

The European Higher Education Area in 2015:

**Bologna Process
Implementation Report**

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EXECUTIVE SUMMARY

Degree system

The EHEA has evolved towards a more common and much more understandable structure of degrees. There is, however, no single model of first-cycle programmes in the EHEA. Most countries combine programmes of 180 ECTS and 240 ECTS. In some countries the number of (usually professional) programmes using the 210 ECTS model is significant as well.

In the second cycle, the most common model is 120 ECTS – two thirds of programmes follow this workload. Other models dominate in particular countries, e.g. 90 ECTS in Cyprus, Ireland and United Kingdom (Scotland) and 60-75 ECTS in Montenegro, Serbia and Spain.

The differences in the total workload of the first and second cycles combined can vary by up to 120 ECTS. Such a large difference in the total workload of first and second qualifications may cause problems in recognition of second cycle qualifications in particular.

Short-cycle qualifications are the exception to the rule of convergent development in degree structures. They have a different status in different countries - part of higher education, part of post-secondary vocational education or even part of secondary education, and may be called very differently from one country to the next. When continuing in first-cycle programmes, short-cycle graduates gain different numbers of credits – from full credit down to zero credits.

Access to the next cycle (according to the Lisbon Recognition Convention definition) is generally smooth. The cases where access is not granted most often occur where the applicant has graduated from a professional programme but applies for admission to an academic programme in the next cycle (or vice versa) and where the applicant holds a qualification which does not follow the Bologna pattern.

The share of first-cycle students continuing studies in a second-cycle programme after graduation from the first cycle varies among the countries. While in some countries only 1-25% of first cycle graduates go on to the second cycle, in other countries this figure may reach 75-100%.

Bologna tools

At least 15 countries have made substantial progress in implementation of national qualifications frameworks, although at the other end of the scale, 12 countries still have not started implementation at programme and institution level, some showing no progress since 2012. A majority of countries still face challenges in including non-formal qualifications within national higher education frameworks self-certified against the QF-EHEA.

There is evidence of progress in ECTS implementation since 2012. ECTS is implemented for both accumulation and transfer to some extent practically everywhere. Linking credits with learning outcomes has progressed as well, although this remains an issue where more effort is needed.

Despite improvement compared to 2012, two thirds of countries have failed to fulfil all the requirements of the Diploma Supplement, and the least achieved requirement is its automatic issuing.

Student-centred learning

Steering and encouraging the use of learning outcomes in curriculum development has grown substantially. However; the use of learning outcomes in student assessment is much less widespread.

In the countries that struggle with a shift to student centred learning, the most critical problems are a lack of recognition of the value of student evaluation of teaching, independent learning and the use of learning outcomes.

Recognition

In more than two thirds of countries higher education institutions make the final decision on recognition of foreign qualifications, while recognition of credits gained abroad is fully in the hands of higher education institutions.

Since recognition is carried out by higher education institutions without the advice of ENIC/NARIC centres in 1/3 of countries, it is important to improve the knowledge and capacity of higher education institutions to undertake this role.

Nearly three quarters of qualifications from at least some of the EHEA countries are treated equally as national qualifications. This demonstrates that there already is some potential for working towards automatic recognition at system level in most EHEA countries.

Quality Assurance

This report provides strong evidence that quality assurance continues to be an area of dynamic evolution across the EHEA.

The trend for higher education institutions to develop their own strategies for quality enhancement is spreading and increasing. Equally the public accountability and transparency requirements in quality assurance systems are evolving, with a significant increase in the number of countries reporting that all institutions publish the outcomes of quality assurance evaluations, even when negative.

External quality assurance systems are now practically ubiquitous in the EHEA – with 22 countries having established quality assurance agencies since the Bologna process. The main issue is no longer whether or not a quality assurance system is in place, but rather whether the system is producing effective results and working in compliance with the European Standards and Guidelines.

In this respect there is still progress to be made, particularly regarding student participation in quality assurance. This is one of the few areas where it is difficult to find evidence of recent positive change. Indeed, it appears that some gains with regard to comprehensive student involvement in quality assurance systems may be slipping back as systems are reformed and reorganised.

While national quality assurance systems can still be differentiated by their tendency to be more accreditation oriented or focused more on quality enhancement, there is an increasing consensus on the issues examined by quality assurance agencies. All systems now focus on teaching, and research is also subject to some form of quality assurance system.

The majority of systems also consider issues such as internal management and the organisation of student services. There are also examples of quality assurance systems becoming more tailor-made and adapted for areas of specialisation in higher education and shifting focus to topics such as internationalisation and entrepreneurship whose relevance is increasing.

One of the major trends and commitments made in the context of the Bologna process is to open up the possibility for higher education institutions to be evaluated by foreign agencies, provided that these are working in full conformity with the European Standards and Guidelines. While there is evidence that higher education institutions are increasingly taking advantage of opportunities to work with agencies from other countries, national reforms in this area are slow-moving. Indeed since the renewed commitments made in the Bucharest Communiqué, only two countries – adding to 12 where this was already possible – have followed up with legislative reform enabling higher education institutions to work with foreign agencies.

Social Dimension

Within the EHEA, countries have committed to the goal the student body should reflect the diversity of the populations and that the background of students should not have an impact on their participation in and attainment of higher education.

While some progress can be noted, the analysis clearly shows that the goal of providing equal opportunities to quality higher education is far from being reached.

With regard to gender, some imbalances have reduced over time but nevertheless continue to exist in most countries and across the EHEA as a whole. Women are overrepresented in the total student population and in new entrants in nearly all countries.

At the level of doctoral education the picture is mixed: in four countries the shares of men and women entering doctoral education are more or less equal; in 12 countries men are underrepresented, in 14 countries women are under-represented.

The greatest gender imbalances exist, however, between different fields of study. In some fields, such as teacher training or social services, men are strongly under-represented. In other fields, such as computing or engineering, women are strongly under-represented. Policies aimed at achieving gender balance in higher education are therefore likely to be most effective if they take study-field-specific imbalances into account.

Another central concern of the social dimension is whether immigrants and children of immigrants have the same chances to participate in and attain higher education as native students. Such information is, however, much more difficult to gather, so data on foreign-born students are used as proxy. This data shows very clearly that in nearly all countries, an immigration background is negatively associated with higher education attainment. Foreign-born young adults are more likely to quit education and training at an early stage and less likely to participate in tertiary education than their native-born counterparts.

Similarly, the educational background of parents continues to have a strong impact on tertiary education attainment. In all EHEA countries for which data is available, children of medium educated parents have much lower chances to attain tertiary education than children of highly educated parents.

Being aware of those (and other) imbalances, almost all higher education systems reflect the objective of widening participation in their higher education policy and more than 70 % of the systems claim to do so through a set of concrete measures.

Despite the commitment in the Leuven/Louvain-la-Neuve Communiqué of 2009 to set ‘measurable targets for widening overall participation and increasing participation of underrepresented groups in higher education, to be reached by the end of the [...] decade’ (), less than 20 % of the systems have defined quantitative objectives with a reference to underrepresented groups. More common are targets for increasing overall participation – 30 of the 48 systems for which data is available have at

least one such target, in most cases related to the European Union's Europe 2020 strategy and its target that by 2020 at least 40 % of young people (aged 30-34) should have completed tertiary or equivalent education. However, whether increasing overall participation will also result in a more balanced composition of the student body remains to be seen.

In more than 90 % of the higher education systems in the EHEA the composition of the student body is subject to some kind of systematic monitoring. In many cases, however, the monitoring covers only a limited number of characteristics, such as age, gender and type and level of qualification achieved prior to entry to higher education. Other characteristics, such as disability, migrant status or labour market status prior to entry to higher education, are monitored to a much lesser degree.

As far as alternative access to higher education is concerned, the overall picture across the EHEA looks very similar to the situation described in the previous implementation report. In 22 higher education systems (most of them in Western Europe) at least one such alternative route to higher education exists, while in the remaining 25 systems for which data is available access to higher education still depends on the possession of an upper secondary school leaving certificate (general or vocational).

Some progress can be noted concerning the recognition of prior non-formal and informal learning but a lot of work remains to be done, with regard to policies, procedures, implementation and monitoring. Currently, there is hardly any data on how many students / candidates are actually participating in the recognition of non-formal and informal learning and are exempted from some or all higher education programme requirements. The same goes for access via alternative routes more generally.

Academic and/or career guidance services are commonly provided by higher education institutions in all 48 higher education systems for which data is available. In two-thirds of the systems, higher education institutions provide psychological guidance services as well. Special services for students with disabilities also exist in a number of cases. In all systems for which information is available, support services are not only offered to enrolled students but also to prospective students. While this wide-spread existence of student services is certainly a positive development, the available data does not allow the quality and effectiveness of the services provided to be assessed, nor the extent to which services are accessible to all students.

Fees and financial support systems have been relatively stable within the EHEA, with no major changes in the general approaches, the share of household contributions or public expenditure on student support. Fees (comprising both tuition and administrative fees) are widespread, with only seven education systems not levying any student contributions. Yet there is a large variation between higher education systems regarding the proportion of students paying fees (from nearly no one to everyone) as well as the amount of fees they need to pay. Countries also rely on different combinations of forms of student support, and the proportion of students receiving such support also varies widely. In general, first cycle students tend to receive more public support than students studying in the second cycle. In the third cycle, as a result of different statuses of doctoral candidates in EHEA countries, fees and support systems are even more diverse.

Lifelong Learning

Lifelong Learning continues to be a challenging concept and one which needs to be broken down into different elements in order to compare realities across countries. Although recent years have seen dramatic economic and social changes to the higher education landscape and have accentuated the need to develop lifelong learning provision, evidence of major structural changes or national action to respond to such challenges is difficult to find. More commonly, institutions are adapting existing provision to meet new and developing needs.

Lifelong learning is a recognised mission in all higher institutions in most of the EHEA countries. Moreover, higher education institutions have a well-established flexible course provision in many countries, offering various types of distance- and e-learning, in addition to part-time studies. Even though not all countries have an official part-time status for higher education students, students may have *de facto* part-time status while theoretically studying full time.

Financing of lifelong learning is fragmented, but the majority of funding in many countries comes from the general public education budget, with additional funding from private contributions from students and businesses. In most countries part-time students do not make higher contributions to the cost of their education than full-time students, although in eight countries they do. Moreover, the financial support for part-time students is in some countries more limited than for their full-time counterparts. Indeed the two issues are often related as in some countries where part-time students need to make higher financial contributions; the support they receive is lower or does not exist. Hence, in these countries there are no financial incentives to study part-time, so students wishing to study more flexibly may find it difficult to do so.

The concept of lifelong learning is rarely well defined in operational terms in EHEA countries, and where definitions exist, they are in many cases rather vague and they vary across countries. Therefore, it is important to take into account the limitations of lifelong learning as a concept through which the demands of 'new learners' are examined. Adults, or mature students, are often considered as learners whose needs often demand specific solutions when designing study paths. When analysing the challenges of new learners, more emphasis could be placed on how education systems deal with the needs of adult learners, while at the same time taking into account the lifelong learning framework.

Effective outcomes and employability

The report provides evidence that higher education attainment levels are generally on the rise in the EHEA. Yet many students still drop out of higher education before completing their studies. Though data availability and comparability still pose challenges, less than 69 % of higher education entrants complete higher education in half of the EHEA countries with available data.

Higher education graduates have been hit hard by the economic crisis. Unemployment ratios have grown proportionally more for them than for their peers with lower levels of education; their income advantages have slightly decreased; and their over-qualification rates have increased in the period between 2010 and 2013. And while unemployment ratios are still the lowest for young people with high educational attainment in most countries, this is not true everywhere within the EHEA. In fact, in one third of the countries with available data, higher education graduates do not have the most secure position in the labour market. In a few countries this is linked to the economic crisis; in others it is due to the structure of the economy and the relatively small higher education sector. Nevertheless, the

situation is improving in this latter group, which includes former Soviet Union member countries and countries in the Balkans, as unemployment ratios of the highly educated are now decreasing.

Hitting male dominated sectors faster and more severely, the economic crisis had a different impact on the unemployment ratios of women and men. In contrast to pre-crisis years, men with low educational attainment have now higher unemployment ratios than their female counterparts, while unemployment ratios are similar for both sexes among the highly educated. This implies that obtaining a higher level qualification can improve men's employment prospects more than those of women.

These developments highlight the need for higher education policy-makers to (re-)focus attention on the employability of graduates. Currently, while almost all EHEA countries recognise employability as a policy concern, systematic measures, such as using labour market forecasting, involving employers, providing incentives to include work placements, improving career guidance services, and monitoring performance with established feedback-mechanisms) are still not applied everywhere. Nevertheless, more and more countries are introducing new policies and monitoring tools such as graduate surveys in order to improve graduate employment.

Some countries apply more centralised policy tools (such as enrolment quotas, compulsory work placement, or rankings) to stimulate employability, while higher education institutions have great autonomy in others. Where this is the case, performance agreements represent a more systematic approach towards improving the employability of graduates – together with the use of other performance indicators such as completion rates.

No matter which approaches are taken, policies have so far neglected the employability issues faced by underrepresented groups. Despite the disadvantages graduates from underrepresented groups might face in the labour market, especially in the current economic climate, the social dimension of graduates' employability is not prominent in the higher education policy agenda in EHEA countries.

Mobility and Internationalisation

EHEA countries are in very different situations with regard to internationalisation and mobility, especially when looking at their individual mobility flows and the level of implication in internationalisation activities.

More than half of the countries lack a national strategy that would position them internationally. Higher education institutions in many countries also lack a comprehensive internationalisation strategy, although they are increasingly engaged in internationalisation activities such as joint programmes/degrees, MOOCs and cross-border cooperation in research. Many countries are yet to adopt national quantitative targets for different forms of mobility.

There is no doubt that the trend for internationalisation is growing, and that this offers great potential for higher education institutions in the EHEA. However, lack of funding as well as inflexible national legal frameworks may hinder development in some countries.

Student mobility rates show slight increases since the 2012 report, but there is little evidence of significant national action to strengthen mobility. Mobility flows can still be considered to be relatively low (even though some countries are experiencing increases) with the result that only a minority of students are benefitting from such experience.

Both the incoming and the outward degree mobility rates within the EHEA are below 5 % for the vast majority of countries with available data. Students from outside the EHEA make up more than 5 % of the total student population in only four countries, while in many this proportion is less than 1 %. Overall, the average rate of incoming degree mobile students (from EHEA and non-EHEA countries) is

relatively low, reaching 4.4 % of total enrolments. This is a very small increase from 4% in 2008/09. The rate of outward mobility (students undertaking a degree in a non-EHEA country) is extremely low, the weighted average of the EHEA countries reaching only 0.33 %, a figure that has not changed since 2008/09.

The concept of 'balanced' mobility is increasingly discussed, yet hardly any country can claim to have genuinely balanced degree mobility. Even when flows reach similar numbers, the countries of origin and destination differ significantly.

It is not yet possible to report accurately on whether the EHEA collective target of 20 % mobility by 2020 can be reached or not, as comprehensive and harmonised data collection is not yet fully in place – particularly for credit mobility.

Funding is perceived by ministries and students alike as the biggest obstacle to increased mobility. The portability of financial student support is clearly one important measure to address this concern, but only a minority of countries currently ensure full portability for their students.

Data limitations pose even more significant challenges in evaluating the current situation for staff mobility. There is no agreed operational definition of staff mobility, a necessary condition to set proper quantitative targets and collect comparable data on participation rates. 'Staff' is not a homogenous group, and it would be important to distinguish obstacles to mobility by type of staff mobility in the future.

For both student and staff mobility, it will be essential to focus not only on numbers, but also on the quality of mobility. This implies investing in information services, monitoring experience, ensuring that recognition and evaluation processes operate fairly, and making changes in light of experience. Improved monitoring of the impact of measures taken to remove obstacles to mobility will also be crucial if optimal mobility flows are to be achieved.

CHAPTER 1: CONTEXT OF THE EUROPEAN HIGHER EDUCATION AREA

2012 Implementation Report

The 2012 report provided information on the conditions for higher education across the European Higher Education Area, showing that the context for higher education reform and development differs substantially between countries. As well as reporting on the array of different structural realities, including institutional types and demographic challenges, the report was able to give a first analysis of the impact of the economic crisis. This illustrated that while expenditure on higher education was affected very differently from one country to the next, overall there had been a decline in public spending on higher education.

Chapter outline

Ministers of the 47 countries in the European Higher Education Area (EHEA) agreed on the common future priorities of the EHEA but they are facing very different contexts when implementing their higher education policies. This first chapter of the report sets the scene in which the higher education systems evolve across the EHEA. It provides insights into the student population in the EHEA area (section 1), the structure of higher education systems in terms of institutions (section 2) and on higher education expenditure throughout the EHEA (section 3).

1.1. Student population

There are around 37.8 million tertiary students in the EHEA (academic year 2011/12). Most of them (nearly 80 %) are enrolled in theoretically-based programmes (ISCED level 5A ⁽¹⁾) in the first two cycles, while only 20 % are in programmes that are more occupationally specific (ISCED level 5B). Students in the third cycle (ISCED level 6 i.e. programmes that lead directly to the award of an advanced research qualification) account for 2.7 % of the total tertiary student population.

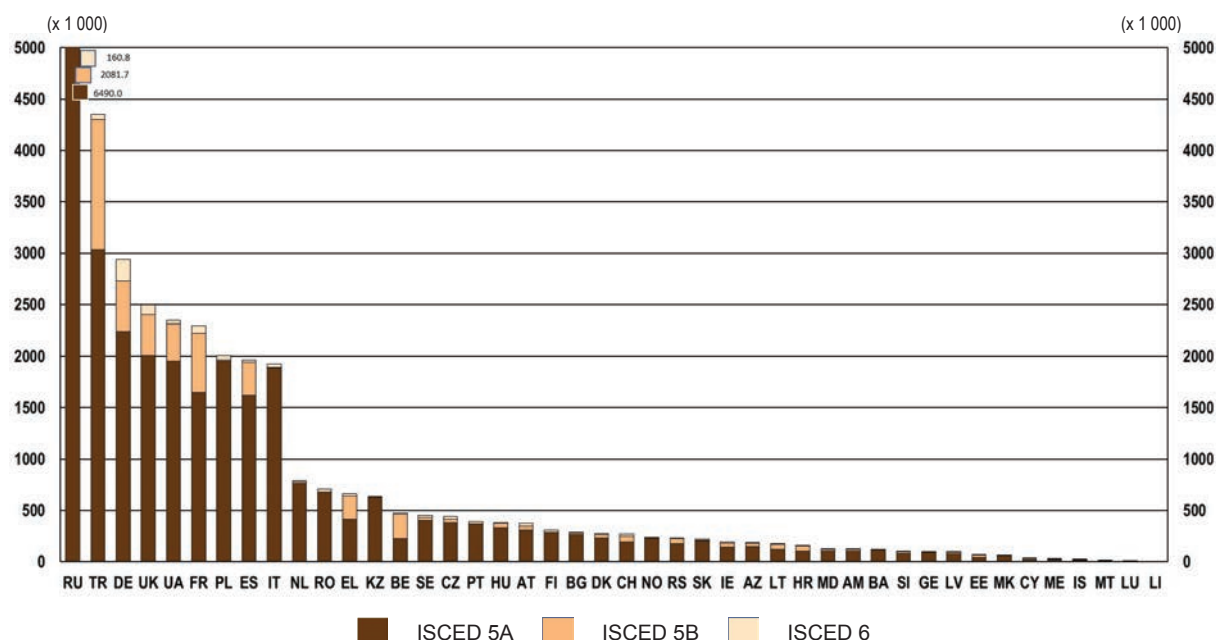
The size of the student population is very diverse in the 47 countries of the EHEA and reflects the demographic characteristics of each country. Demographic conditions (i.e. the size of young age cohorts) impact student enrolments in tertiary education but other inter-related factors also affect the size of the student population: the size of the eligible population (i.e. persons with qualification required to enter tertiary education); the effective entry in tertiary education conditioned by the particular aspirations of the eligible population, the selection criteria for admission, existing alternative opportunities in the labour market, the cost of participation and the potential gain of completing tertiary education; the theoretical length of studies (which in turn depends on the structure of the programmes supplied by tertiary education system) and the effective duration of studies (impacted by the drop-out rate and part-time attendance among other things) (OECD 2008)².

(¹) When the source of the data is Eurostat, ISCED refers to the ISCED97 classification.

(²) OECD (2008), "What is the Impact of Demography on Higher Education Systems? A Forward-looking Approach for OECD Countries" Higher Education to 2030, Volume 1: Demography, Chapter 2

The total number of students in ISCED levels 5A, 5B and 6 varies between 960 in Liechtenstein to 8 732 579 in Russia, a country which takes up slightly more than 23 % of the student population in the whole EHEA area. Students in the five countries with the highest number of tertiary education students (Russia, Turkey, Germany, the United Kingdom and Ukraine) represent slightly more than 55 % of the total. Apart from these countries, France, Poland, Spain and Italy have more than 1 900 000 students, while there are less than 200 000 in 18 countries of the EHEA (out of those where data is available).

Figure 1.1: Number of students enrolled in tertiary education by ISCED level, 2011/12



Number	RU	TR	DE	UK	UA	FR	PL	ES	IT	NL	RO
TOTAL	8 732 579	4 353 542	2 939 463	2 495 780	2 347 380	2 296 306	2 007 212	1 965 829	1 925 930	793 678	705 333
ISCED 5A	6 490 002	3 031 232	2 240 603	2 010 039	1 954 789	1 649 057	1 953 696	1 621 895	1 887 038	765 252	681 515
ISCED 5B	2 081 736	1 270 351	490 360	390 792	356 768	576 668	13 253	321 392	4 263	15 884	:
ISCED 6	160 841	51 959	208 500	94 949	35 823	70 581	40 263	22 542	34 629	12 542	23 818
Number	EL	KZ	BE	SE	CZ	PT	HU	AT	FI	BG	DK
TOTAL	663 698	629 507	477 712	453 328	440 230	390 273	380 757	376 498	308 924	284 995	275 009
ISCED 5A	415 773	627 919	228 327	404 482	381 255	370 972	331 455	310 011	288 645	264 082	232 820
ISCED 5B	224 478	:	235 217	27 494	32 870	74	42 048	40 436	84	16 210	33 230
ISCED 6	23 447	1 588	14 168	21 352	26 105	19 227	7 254	26 052	20 195	4 703	8 959
Number	CH	NO	RS	SK	IE	AZ	LT	HR	MD	AM	BA
TOTAL	269 573	238 224	231 661	221 227	192 647	184 834	175 066	157 289	124 784	120 733	115 907
ISCED 5A	191 844	229 135	178 789	206 231	143 937	147 774	122 414	104 656	105 588	106 855	115 036
ISCED 5B	55 717	871	47 322	2 851	39 780	35 978	49 777	49 398	17 321	12 779	659
ISCED 6	22 012	8 218	5 550	12 145	8 930	1 082	2 875	3 235	1 875	1 099	212
Number	SI	GE	LV	EE	MK	CY	ME	IS	MT	LU	LI
TOTAL	104 003	99 376	97 041	67 607	63 318	31 772	25 313	19 099	12 203	6 085	960
ISCED 5A	82 781	95 110	77 697	43 765	60 940	22 604	20 690	18 388	10 498	4 320	854
ISCED 5B	17 124	:	16 821	20 791	1 921	8 458	4 532	259	1 628	1 375	:
ISCED 6	4 098	4 266	2 523	3 051	457	710	91	452	77	390	106

Notes:

Countries are sorted by total number of students in tertiary education.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

The picture is rather different when considering the population of students in ISCED level 6 only. The four countries with the highest number of students in doctoral education (Germany, Russia, the United Kingdom and France) represent nearly 53 % students in the EHEA. With 208 500 students, nearly

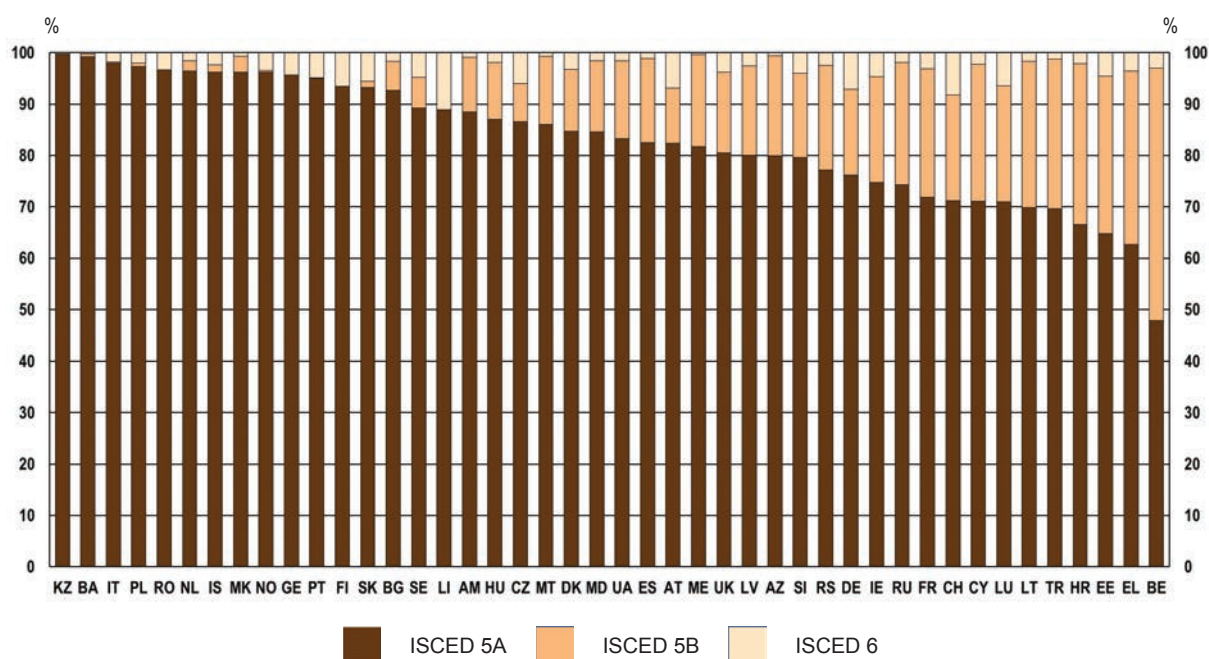
21 % of the EHEA students at this level of education are enrolled in Germany while 15.9 % of them are enrolled in Russia. At the other end of the spectrum, there are less than 2 000 students in 20 countries of the EHEA for which data is available.

Countries of the EHEA also differ largely in the composition of their tertiary student population in terms of level of education. This reveals differences in terms of supply of educational programmes (i.e. between programmes with an academic orientation which are largely theoretically based – ISCED level 5A – and those with an occupational orientation which are typically shorter and designed to enter to the labour market – ISCED level 5B³⁾ but also in terms of the aspiration of students regarding the type of programmes in which they wish to enrol.

In all EHEA countries except Belgium, a majority of tertiary students are enrolled in ISCED level 5A programmes (Bachelor and Master). Such programmes account for 63 % of the total student population in Greece and nearly all students in Bosnia and Herzegovina, Kazakhstan and Italy. In seven EHEA countries (Croatia, Cyprus, Estonia, France, Greece, Lithuania and Turkey), at least a quarter of the student population is enrolled in programmes with an occupational orientation (ISCED level 5B) while in Belgium the number rises to 49 %.

Students in doctoral programmes usually account for less than 5 % of the student population with the exception of eight countries where they represent a higher proportion, despite standing below 9 % of the total student population (except in Liechtenstein where the 106 students in doctoral programmes represent 11 % of the total population of students).

Figure 1.2: Distribution of students enrolled in tertiary level of education by ISCED level, 2011/12



⁽³⁾ Although it is specified in the ISCED97 classification, the distinction between academic and vocational orientation of programmes in tertiary education might be considered as somewhat artificial: most graduates from ISCED 5A programmes enter the “non academic” labour market after completion, while it is a common policy goal to enable graduates of all kinds of programme to progress in their studies if they wish – irrespective of the academic/vocational orientation of the programme.

	KZ	BA	IT	PL	RO	NL	IS	MK	NO	GE	PT	FI	SK	BG	SE
ISCED 5A	99.7	99.2	98.0	97.3	96.6	96.4	96.3	96.2	96.2	95.7	95.1	93.4	93.2	92.7	89.2
ISCED 5B	:	0.6	0.2	0.7	:	2.0	1.4	3.0	0.4	0.0	0.0	0.0	1.3	5.7	6.1
ISCED 6	0.3	0.2	1.8	2.0	3.4	1.6	2.4	0.7	3.4	4.3	4.9	6.5	5.5	1.7	4.7
	LI	AM	HU	CZ	MT	DK	MD	UA	ES	AT	ME	UK	LV	AZ	SI
ISCED 5A	89.0	88.5	87.1	86.6	86.0	84.7	84.6	83.3	82.5	82.3	81.7	80.5	80.1	79.9	79.6
ISCED 5B	:	10.6	11.0	7.5	13.3	12.1	13.9	15.2	16.3	10.7	17.9	15.7	17.3	19.5	16.5
ISCED 6	11.0	0.9	1.9	5.9	0.6	3.3	1.5	1.5	1.1	6.9	0.4	3.8	2.6	0.6	3.9
	RS	DE	IE	RU	FR	CH	CY	LU	LT	TR	HR	EE	EL	BE	
ISCED 5A	77.2	76.2	74.7	74.3	71.8	71.2	71.1	71.0	69.9	69.6	66.5	64.7	62.6	47.8	
ISCED 5B	20.4	16.7	20.6	23.8	25.1	20.7	26.6	22.6	28.4	29.2	31.4	30.8	33.8	49.2	
ISCED 6	2.4	7.1	4.6	1.8	3.1	8.2	2.2	6.4	1.6	1.2	2.1	4.5	3.5	3.0	

Notes:

[To be included]. Countries are sorted by number of students enrolled at ISCED level 5A.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

EHEA countries show a mixed picture when looking at the changes in the total student population during the periods between some of the recent key milestones of the Bologna process (i.e. between 2005/06 and 2008/09 and between 2008/09 and 2011/12) as well as when considering this entire time period. Changes in the student population through time result from the influence of multiple factors. It should also be borne in mind that demographic changes (i.e. an increase or a decrease of a cohort) only gradually affect the higher education system because of the “continued impact of past cohorts” (OECD 2008)⁴

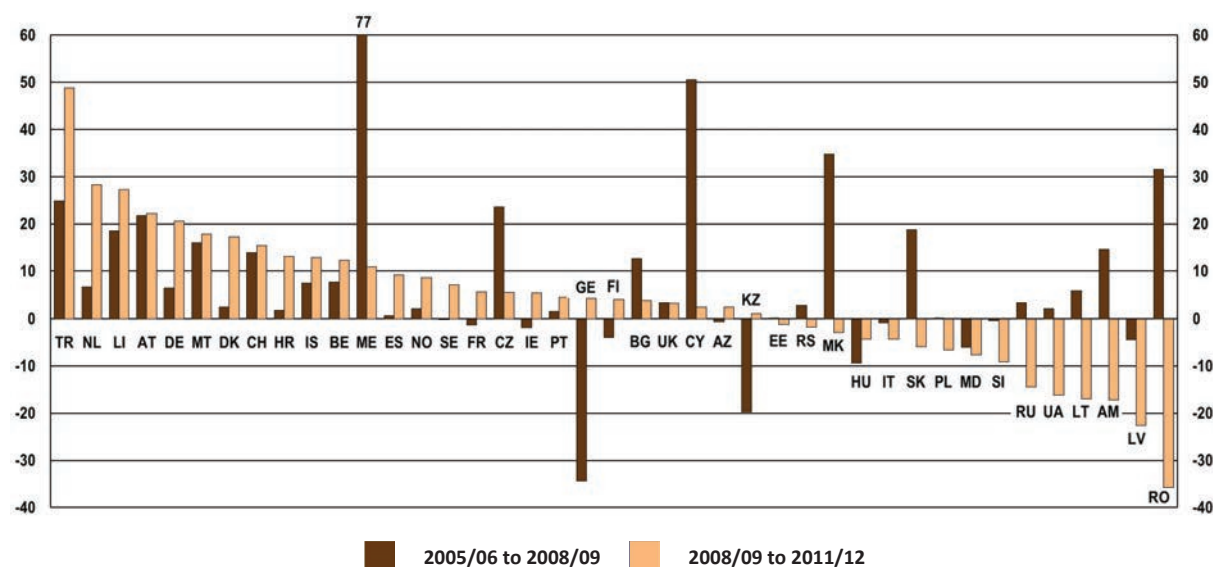
The total number of students enrolled in tertiary education is lower in 2012 than in 2006 in nearly one third of the EHEA countries for which data is available. This decrease is the most pronounced in Georgia (- 31.5 %), Latvia (-26 %), Kazakhstan (-18.8 %) and Romania (-15.5 %) when comparing the two academic years, despite the four countries showing different patterns within this time period. Georgia and Kazakhstan recorded a strong decrease in the number of students between 2006 and 2009 while showing a limited rise between 2009 and 2012. Latvia registered two consecutive decreases in the total number of students. In Romania the strong growth in the number of students in 2009 compared to 2006 was followed by a decline in 2012 compared to 2009.

The number of tertiary students declined during the two time periods in Hungary, Italy, Moldova and Slovenia. In Italy and Slovenia, the decrease in the number of tertiary student was moderate between 2005/06 and 2008/09 but more pronounced during the second time period. Overall, the decline of the student population ranges from 5 % in Italy to 13 % in Moldova and Hungary.

On the other hand, the total number of tertiary students strongly increased in Luxembourg – where it more than doubled (from 2 692 students in 2006 to 6 085 in 2012) – Montenegro (+96 %) and Turkey (+86 %). Both Montenegro and Turkey register high increases over both periods. Austria, Cyprus, Liechtenstein, Malta and the Netherlands show an increase of more than one third of their student population in 2012 compared to 2006. These countries are among the half of EHEA countries where the total number of students increased during the two periods.

⁽⁴⁾ OECD (2008), "What is the Impact of Demography on Higher Education Systems? A Forward-looking Approach for OECD Countries" Higher Education to 2030, Volume 1: Demography, Chapter 2

Figure 1.3: Change in the total number of students enrolled in tertiary education between 2005/06 and 2008/09 and/or between 2008/09 and 2011/12



	TR	NL	LI	AT	DE	MT	DK	CH	HR	IS	BE	ME	ES	NO	SE
2005/06 to 2008/09	24.8	6.7	18.6	21.7	6.5	16.0	2.5	13.9	1.8	7.6	7.8	76.9	0.6	2.1	0.0
2008/09 to 2011/12	48.9	28.3	27.3	22.2	20.5	17.9	17.2	15.5	13.1	12.9	12.3	10.9	9.2	8.6	7.3
2005/06 to 2011/12	85.8	36.9	50.9	48.7	28.4	36.8	20.1	31.5	15.1	21.5	21.1	96.2	9.9	11.0	7.3
	FR	CZ	IE	PT	GE	FI	BG	UK	CY	AZ	KZ	EE	RS	MK	HU
2005/06 to 2008/09	-1.3	23.5	-1.8	1.5	-34.4	-4.0	12.6	3.4	50.5	-0.6	-19.8	0.2	2.9	34.8	-9.4
2008/09 to 2011/12	5.7	5.6	5.5	4.6	4.4	4.1	3.9	3.3	2.5	2.5	1.1	-1.2	-1.8	-2.9	-4.3
2005/06 to 2011/12	4.3	30.5	3.5	6.3	-31.5	0.0	17.1	6.8	54.3	2.0	-18.9	-1.0	1.0	30.9	-13.2
	IT	SK	PL	MD	SI	RU	UA	LT	AM	LV	RO	EL	LU		
2005/06 to 2008/09	-0.9	18.7	0.2	-6.0	-0.4	3.4	2.1	6.0	14.6	-4.4	31.5	:	:		
2008/09 to 2011/12	-4.3	-5.9	-6.6	-7.7	-9.1	-14.4	-16.1	-16.9	-17.2	-22.6	-35.8	:	:		
2005/06 to 2011/12	-5.1	11.8	-6.5	-13.2	-9.4	-11.5	-14.3	-12.0	-5.1	-26.0	-15.5	1.6	126.0		

Notes:

[To be included]. Countries are sorted by the percentage change between 2008/09 and 2011/12.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

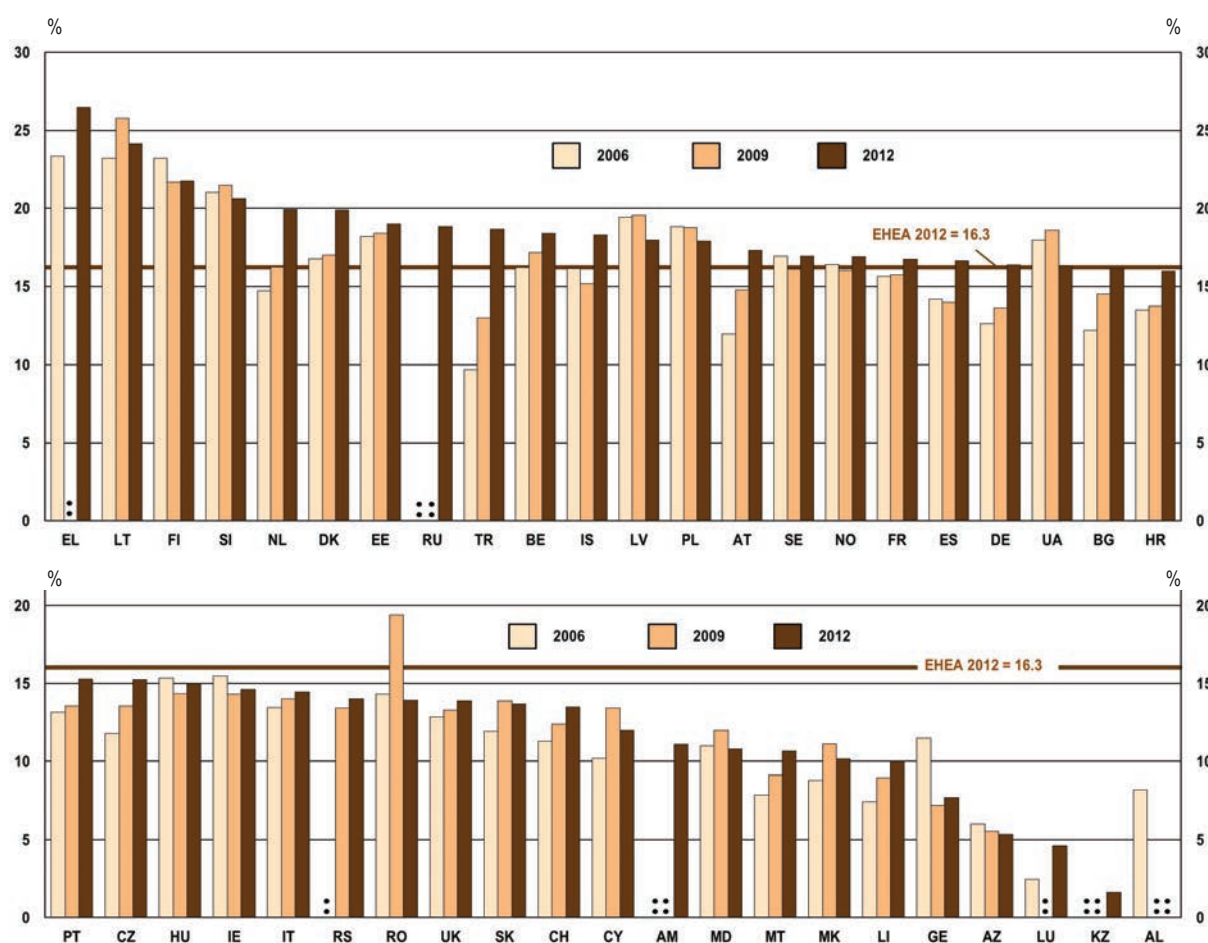
As mentioned above, there is a time lag before the total student population is impacted by a change in the population of younger cohorts. Information on the trend of the total population of students should thus be balanced by information on the enrolment rate which compares the total population of students with the population of a specific age group. The share of the population aged 18-34 enrolled in tertiary education provides insight into the capacity of the education system to enrol students of this age group. However, defining the most appropriate higher education age group is not completely self-evident as education systems still differ significantly between countries. The theoretical age at which secondary general education ends varies between 17 and a half years old (e.g. Genel Liseler or Anadolu Liseleri in Turkey) and 21 years old for some programmes in Sweden (Eurydice 2013⁽⁵⁾). Furthermore, the enrolment rate is impacted by the duration of programmes and the actual time spent in higher education. Countries with a shorter average study duration would have a lower enrolment

⁽⁵⁾ Eurydice (2013) The structure of the European education systems 2013/14: schematic diagrams available at: http://eacea.ec.europa.eu/education/eurydice/facts_and_figures_en.php#diagrams

rate than countries with a higher study duration even if the share of an age cohort enrolled in tertiary education is the same between the two countries. In parallel, a shortening or lengthening (e.g. in cases where students tend to stay longer in higher education due to a worsening labour market situation) of the average study duration will also have an impact on the enrolment rate over time.

EHEA countries show different levels of enrolment rates of the 18-34 years old in tertiary education. In Greece, slightly more than a quarter of the 18-34 years olds are enrolled in tertiary education. Lithuania, Finland, Slovenia, the Netherlands and Denmark also experience high participation rates, approaching 20 % or beyond. At the end of the spectrum, the participation rate in Georgia, Azerbaijan, Luxembourg and Kazakhstan is below 10 %.

Figure 1.4: Enrolment rates in tertiary education for the 18-34 years old (% of the total population aged 18-34), 2005/06, 2008/09, 2011/12



	EL	LT	FI	SI	NL	DK	EE	RU	TR	BE	IS	LV	PL	AT	SE
2006	23.4	23.2	23.2	21.0	14.7	16.8	18.2	0.1	9.7	16.2	16.1	19.4	18.8	12.0	16.9
2009	:	25.8	21.7	21.5	16.3	17.0	18.4	0.3	13.0	17.2	15.2	19.6	18.8	14.8	16.1
2012	26.5	24.1	21.7	20.6	19.9	19.9	19.0	18.8	18.7	18.4	18.3	18.0	17.9	17.3	16.9
	NO	FR	ES	DE	UA	BG	HR	PT	CZ	HU	IE	IT	RS	RO	UK
2006	16.4	15.7	14.2	12.7	18.0	12.2	13.5	13.2	11.8	15.3	15.5	13.4	:	14.3	12.8
2009	16.0	15.7	14.0	13.6	18.6	14.5	13.8	13.6	13.6	14.3	14.3	14.0	13.4	19.4	13.3
2012	16.9	16.7	16.6	16.4	16.3	16.1	16.0	15.3	15.2	15.0	14.6	14.5	14.0	13.9	13.9
	SK	CH	CY	AM	MD	MT	MK	LI	GE	AZ	LU	KZ	AL		
2006	11.9	11.3	10.2	:	11.0	7.9	8.8	7.4	11.5	6.0	2.4	:	8.2		
2009	13.9	12.4	13.4	:	12.0	9.1	11.1	9.0	7.2	5.5	:	:	:		
2012	13.7	13.5	12.0	11.1	10.8	10.7	10.2	10.0	7.7	5.3	4.6	1.6	:		

Notes:

[To be included]. Countries are sorted by enrolment rate in academic year 2011/12.

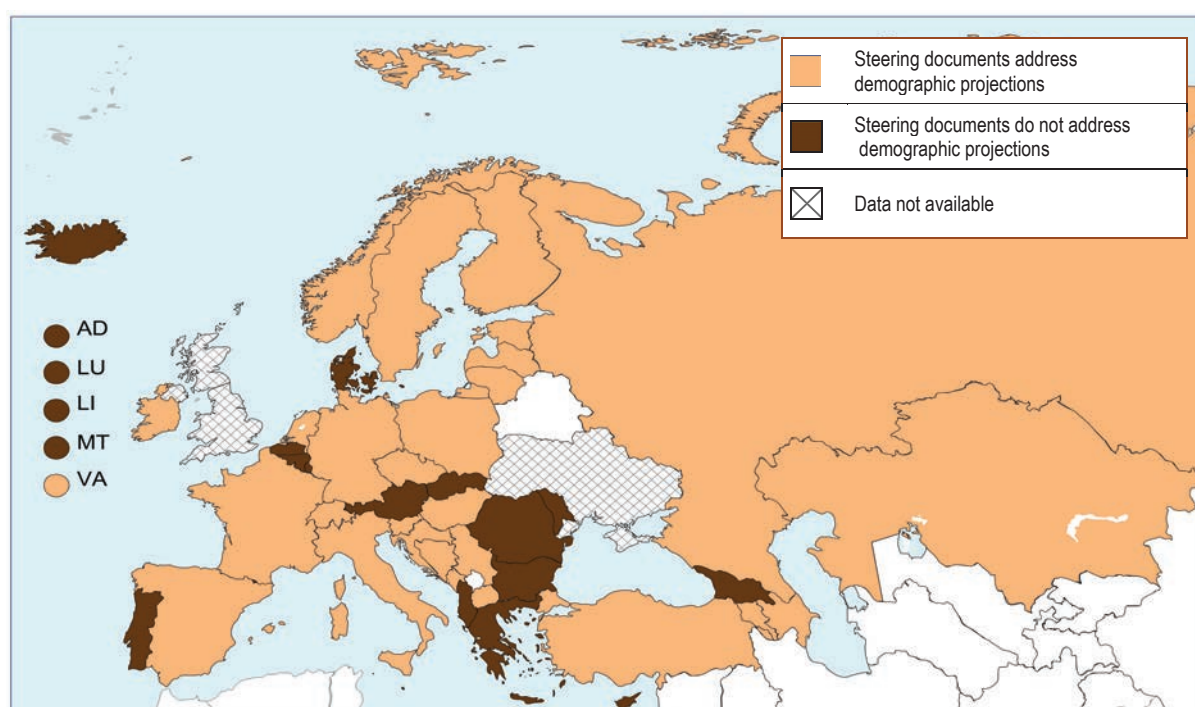
Source: Eurostat, UOE data collection and additional collection for the other EHEA countries.

Enrolment of 18-34 years old as a percentage of the population of the same age group increased in 2012 compared to 2006 and 2009 in half of the countries for which data is available. This confirms the trend in some countries towards the development of tertiary education complemented, for some of them, by increasing inflows of degree mobile students (see Chapter 7). Furthermore, in 2012, half of the EHEA countries for which data is available show an enrolment rate higher than 16.3 % (against 14.3 % in 2009 and 13.5 % in 2006). In Latvia, Romania and Georgia, the percentage of the 18-34 in tertiary education decreased by 1.5 percentage point (pp), 0.4 pp and 3.8 pp respectively. As the decline of the student population in these countries is stronger overall, this suggests that the decrease is not exclusively explained by demographic factors. Similarly, the percentage of the population aged 18-34 enrolled in tertiary education is lower in 2012 than in 2006 in Hungary, Slovenia and Moldova. Italy shows a different pattern: while the number of students decreased over the period, the enrolment rate (of the 18-34 population) stands at 14.5 % in 2012 which is 1 pp higher than in 2006.

Five other EHEA countries (Azerbaijan, Poland, Ireland, Finland and Ukraine) experience a lower enrolment rate of the 18-34 years old population in 2012 than in 2006 in conjunction with a decrease of the population of tertiary students (Poland and Ukraine), little change (Finland) and an increase (Ireland) in 2012 compared to 2006.

Demographic changes affecting the number of students have to be taken into consideration when designing higher education policies and goals. Figure 1.5 shows that in around 60 % of countries, steering documents for higher education explicitly take account of demographic projections. On the one hand, many countries are concerned about the decreasing number of young people and how such changes will affect higher education participation and funding. On the other hand, several countries prepare for the increasing skills needs of an ageing population and the entry of non-traditional learners into higher education.

Figure 1.5: Demographic projections in steering documents for higher education policy, 2014/15



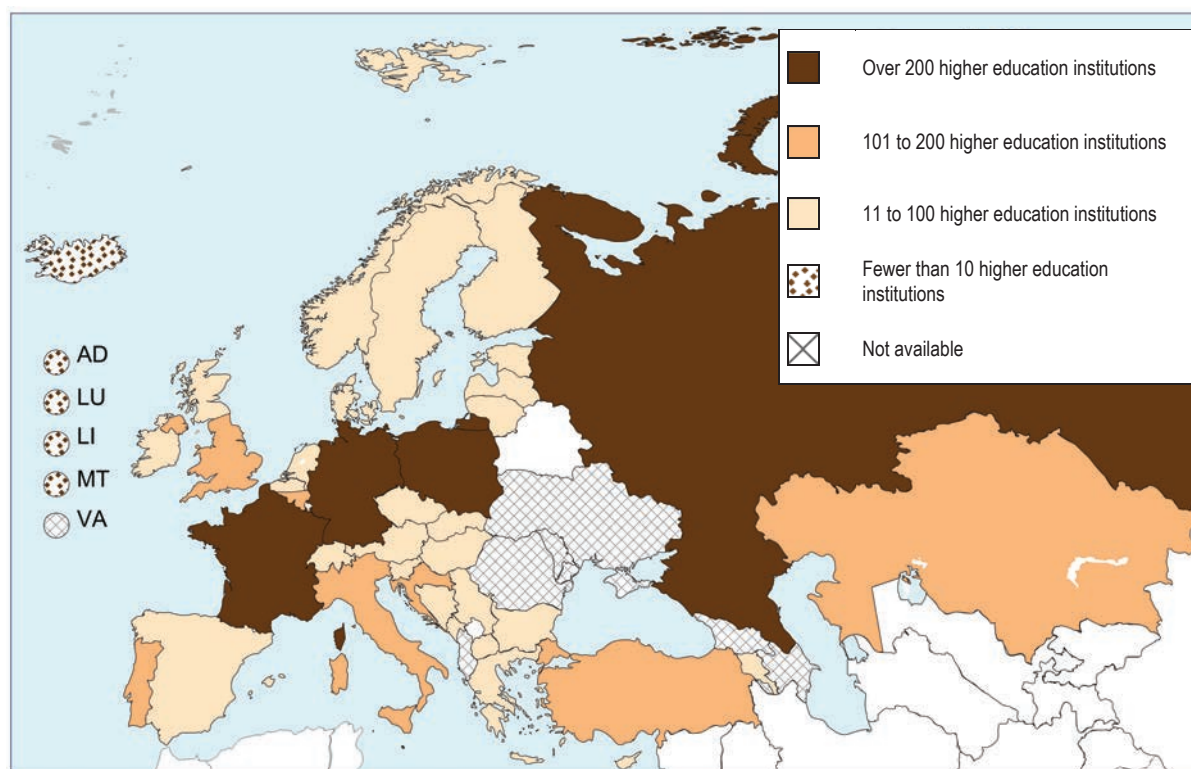
In comparison to the 2012 Bologna Implementation Report, seven countries have introduced demographic projections in their steering documents (Croatia, Former Yugoslav Republic of Macedonia, Holy See, Italy, Latvia, Russia and Spain). Conversely, four countries - Denmark, Georgia, Moldova and Romania – now report that demographic projections are not included in steering documents.

1.2. Higher education institutions

The type and number of higher education institutions also vary among the EHEA countries. Higher education institutions can be academically or professionally oriented; can be publicly or privately founded and funded; or there might be other distinctions applied in a given country context. Indeed, in an age of rapid development in the forms of higher education – with increasing open and distance higher education provision for example - it is not an obvious matter to define precisely what a higher education institution actually is.

Figure 1.6 shows the total number of recognised higher education institutions in EHEA countries. The numbers of institutions reported in this context covers each country's domestic higher education institutions operating within its own territory. Most commonly, there are between 11 and 100 higher education institutions (26 countries). Within this range, Montenegro, Serbia and the United Kingdom (Scotland) have the lowest number of institutions, between 11 and 20. In the middle, Ireland, Sweden and Finland have each 44 higher education institutions, and at the higher end of this category, the Czech Republic, Norway and Spain have between 70 and 90 higher education institutions. Seven countries have between 101 and 200 higher education institutions, ranging from 124 in Portugal to 184 in Turkey. Four countries have over 200 higher education institutions: there are almost 300 in France, over 400 in Germany and Poland, while the highest number of higher education institutions can be found in Russia, with over 900 institutions.

Figure 1.6: Number of higher education institutions in the EHEA, 2015



Source: BFUG questionnaire

While higher education institutions can be academically or professionally oriented, this distinction is becoming less clear-cut. In many countries, old differences between academically and professionally oriented institutions still exist formally, but – partly due to the Bologna Process – actual differences are diminishing or have ceased to exist altogether. For example, in many cases, both academically and professionally oriented institutions can offer academic and professional programmes. This also means that while there might be a (formal) distinction between the institutions, there are no differences between the degrees awarded. In other cases, there might be no distinction between institutions, but there could still be a difference between the orientations of the study programmes offered. Therefore, it is impossible to create a clear typology of countries along this dimension.

A second possible distinction to be made is between public and private higher education institutions. This distinction refers mainly to the source of funding: whether higher education institutions are financed primarily from public or private sources (for a detailed definition, see the Glossary and methodological notes). In an age where higher education institutions are increasingly diversifying their funding sources, this distinction is also less clear-cut than in the past. For this reason, privately founded higher education institutions funded mainly by the state or from public sources are considered as public institutions here.

There are both public and private higher education institutions in the vast majority of the EHEA countries. However, the weight of private institutions within a country might differ. Whereas some countries have more private institutions than public, in many the number of private institutions is fairly small in comparison to public higher education institutions. In the vast majority of EHEA countries, Eurostat data shows that between 70 % and 95 % of tertiary students are enrolled in public institutions. Cyprus is the only country where the majority of students are enrolled in private institutions. The private independent sector also accounts for nearly 30 % of students in Poland.

All institutions are considered public in four education systems (Belgium (French Community), Bosnia and Herzegovina, Liechtenstein and Greece).

1.3. Public expenditure on higher education

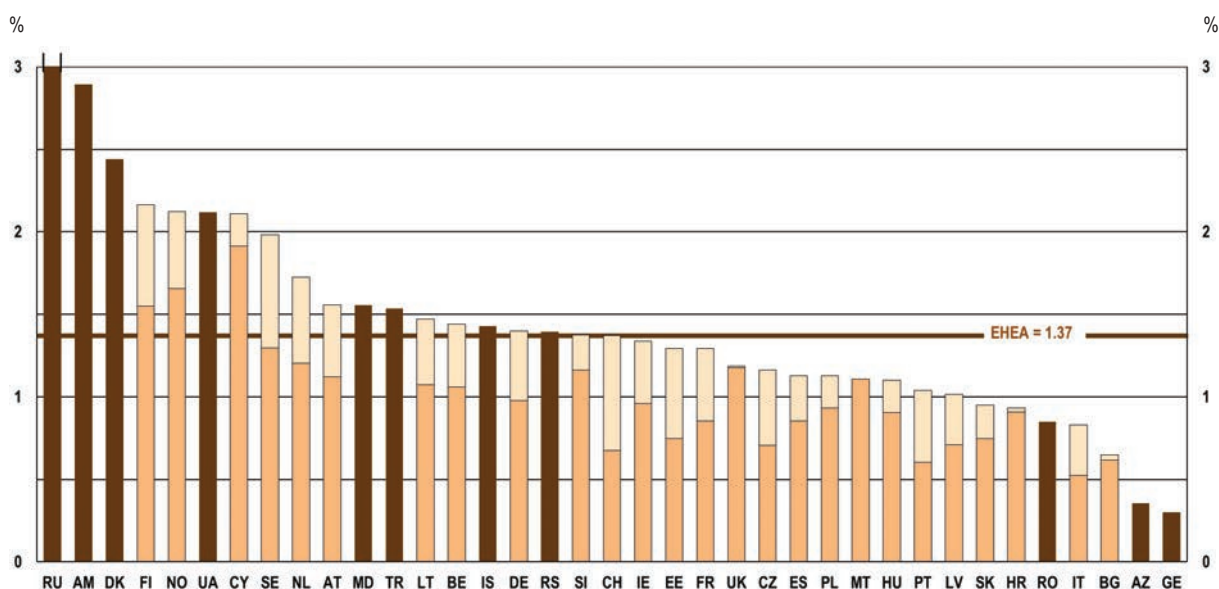
European higher education institutions are funded predominantly from public sources. This section compares public expenditure on higher education based on Eurostat indicators. Alone, none of the indicators presented below can provide a sufficient basis for comparing EHEA countries; but taken together they provide a broad overview of similarities and differences between them. The economic crisis had a strong impact on the level of public funding of education and higher education systems were not spared (see EACEA/Eurydice, 2011b).

Annual public expenditure on tertiary education (which includes expenditure from all levels of government) not only covers the funding of universities and higher education institutions but also all other tertiary educational institutions providing education-related services. These include entities administering education (e.g. ministries or department of education), providing ancillary services, and entities performing educational research, curriculum development and educational policy analysis. Annual public expenditure on tertiary education as a percentage of GDP can be used as an indicator of the country's public financial effort in supporting its higher education system in relation to the strength of the country's economy.

Thus, apart from expenditure on educational core goods and services (i.e. expenditure that is directly related to instruction and education e.g. expenditure on teachers, university and institutions' buildings, teaching materials, etc.), annual public expenditure also includes all expenditure on research performed at universities and other tertiary institutions and public expenditure on ancillary services (i.e.

services provided by educational institutions that are peripheral to the main educational mission). Annual public expenditure on tertiary education also includes public transfers and payments to private entities such as public subsidies to households (including scholarships and grants, public loans to students, specific public subsidies in cash or in kind for transport, medical expenses, books and other materials, etc.). However, annual public expenditure does not cover tuition fees which are direct household expenditure on education.

Figure 1.7: Annual public expenditure on tertiary education as a % of GDP, 2011



■ Total ■ Annual public expenditure excluding R&D ■ R&D

	RU	AM	DK	FI	NO	UA	CY	SE	NL	AT	MD	TR	LT
Total	8.71	2.89	2.44	2.17	2.12	2.12	2.11	1.98	1.72	1.56	1.56	1.54	1.47
R&D	:	:	:	0.62	0.46	:	0.20	0.69	0.52	0.44	:	:	0.40
(*)	8.71	2.89	2.44	1.55	1.66	2.12	1.91	1.30	1.20	1.12	1.56	1.54	1.07
	BE	IS	DE	RS	SI	CH	IE	EE	FR	UK	CZ	ES	PL
Total	1.44	1.43	1.40	1.39	1.37	1.37	1.34	1.29	1.29	1.19	1.16	1.13	1.13
R&D	0.38	:	0.42	:	0.21	0.70	0.38	0.55	0.44	0.01	0.46	0.27	0.19
(*)	1.06	1.43	0.98	1.39	1.16	0.68	0.96	0.75	0.85	1.17	0.71	0.85	0.93
	MT	HU	PT	LV	SK	HR	RO	IT	BG	AZ	GE		
Total	1.11	1.10	1.04	1.01	0.95	0.93	0.85	0.83	0.65	0.36	0.30		
R&D	0.00	0.20	0.44	0.30	0.20	0.02	:	0.31	0.03	:	:		
(*)	1.11	0.91	0.60	0.71	0.75	0.91	0.85	0.52	0.62	0.36	0.30		

(*) Annual public expenditure excluding R&D

Notes:

[Source: UOE educ_esms_an20 – FA01_4]

Belgium: Expenditure excludes independent private institutions and the German speaking Community.

Denmark: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. R&D expenditure is not available. Expenditure excludes independent private institutions.

Iceland and Ireland: Expenditure for ancillary services is not available.

Croatia: Public transfers to private entities other than households are not available. Expenditure excludes independent private institutions. Data exclude local transfers and payments to private entities.

Cyprus: Including financial aid to students studying abroad.

Portugal: Expenditure at local level of government is not available. Expenditure for ancillary services is not available. Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. Student loans from public sources are not available. Public transfers to private entities other than households are not available.

Slovakia: Expenditure of ISC 5B is not included.

Source: Eurostat (UOE data collection), UIS-UNESCO for Armenia and Azerbaijan and additional collection for the other EHEA countries.

Notes:

[Source: UOE educ_esms_an20 – FA01_4]

Belgium: Expenditure exclude independent private institutions and the German speaking Community.

Denmark: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. R&D expenditure is not available. Expenditure excludes independent private institutions.

Ireland: Expenditure for ancillary services is not available.

Croatia: Public transfers to private entities other than households are not available. Expenditure excludes independent private institutions. Data exclude local transfers and payments to private entities.

Cyprus: Including financial aid to students studying abroad.

Portugal: Expenditure at local level of government is not available. Expenditure for ancillary services is not available. Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. Student loans from public sources are not available. Public transfers to private entities other than households are not available.

Slovakia: Expenditure of ISC 5B is not included.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Half of the EHEA countries for which data is available invest more than 1.3 % of their GDP in tertiary education. Annual public expenditure on tertiary education is the highest in Nordic countries (from 2 % of GDP in Sweden to 2.4 % of GDP in Denmark) and around 2 % in Cyprus and Ukraine. Annual public expenditure on tertiary education is the lowest and below 1 % of GDP in Slovakia, Croatia, Romania, Italy, Bulgaria, Azerbaijan, Armenia and Georgia.

In some EHEA countries, expenditure on R&D takes up a high part of annual public expenditure on tertiary education. Such direct R&D expenditure might be funded through different modes: institutional funding and/or project-based funding and depend on the overall institutional settings of EHEA countries' research systems. In Switzerland, R&D expenditure accounts for half of the annual expenditure on tertiary education and for 0.7 % of the GDP. Other EHEA countries such as Sweden (0.69 % of GDP), Finland (0.62 %), Estonia (0.55 %) and the Netherlands (0.52 %) also show high research intensity in the tertiary education sector. In these countries, public expenditure for educational core services and ancillary services at tertiary level are thus less than half of the annual public expenditure on tertiary education.

The public financial effort directed to tertiary education can also be assessed against the total public expenditure. Indeed, in periods of public budget rationalisation and constraint, the analysis of annual public expenditure on tertiary education as a share of the total public expenditure indicates the relative priority attached to tertiary education compared to other levels of education and to other functions of public funding.

In 2011, half of the EHEA countries devoted more than 2.7 % of their total public expenditure to tertiary education. The EHEA countries allocating the highest share of their public expenditure to tertiary education expenditure are Norway (4.83 %), Ukraine (4.64 %), Cyprus (4.56 %), Denmark (4.23 %) and Switzerland (4.08 %). Few countries devote less than 2 % of their public funding to tertiary education: Croatia (1.94 %), Bulgaria (1.82 %), Italy (1.67 %) and Azerbaijan (1.06 %).

The trend of this indicator alone does not allow definite conclusions to be drawn with respect to the actual levels of tertiary education funding. Changes in the proportion of expenditure on tertiary education result from the combination of two trends and their respective pace: the first regards public expenditure on tertiary education, and this needs to be seen in relation to total public expenditure. A constant ratio through time only indicates that both public expenditure on tertiary education and total public expenditure grew or diminished at the same rate. It suggests that tertiary education is given the same public financial priority through time.

The ratio increases when public expenditure on tertiary education grows more rapidly (or declines less rapidly) than total public expenditure. Such a situation highlights that tertiary education is given a higher priority compared to other public expenditure or that it has been less severely hit by budgetary cuts than other areas of public expenditure in the framework of the consolidation of public finances.

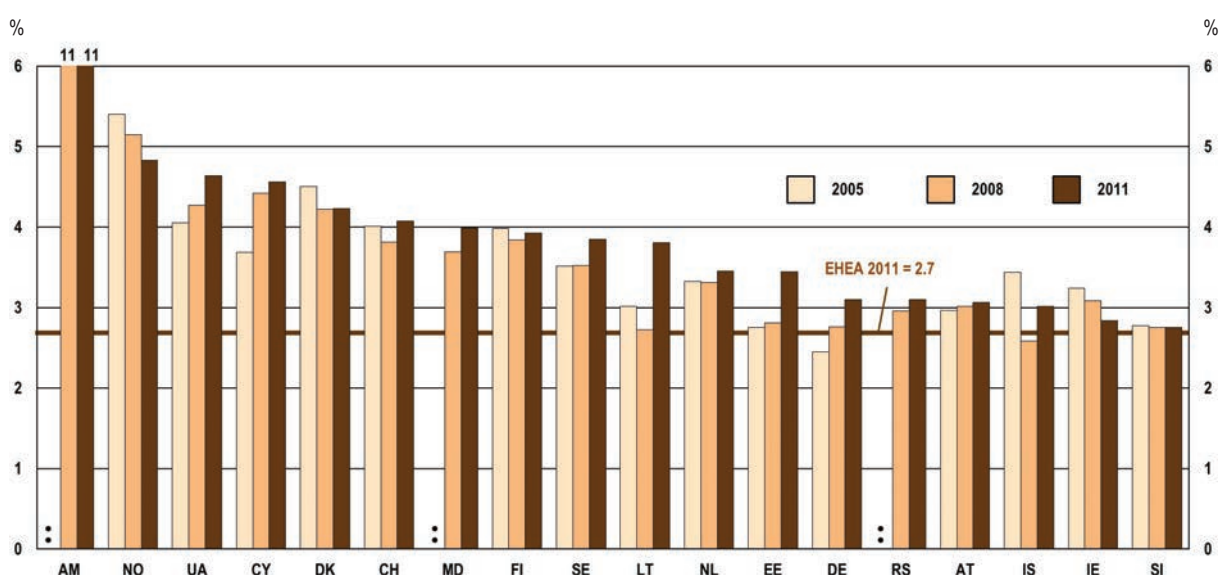
Three groups of countries might be identified when analyzing the evolution of the share of public expenditure directed to tertiary education across the key milestones of the Bologna process (2005, 2008 and 2011).

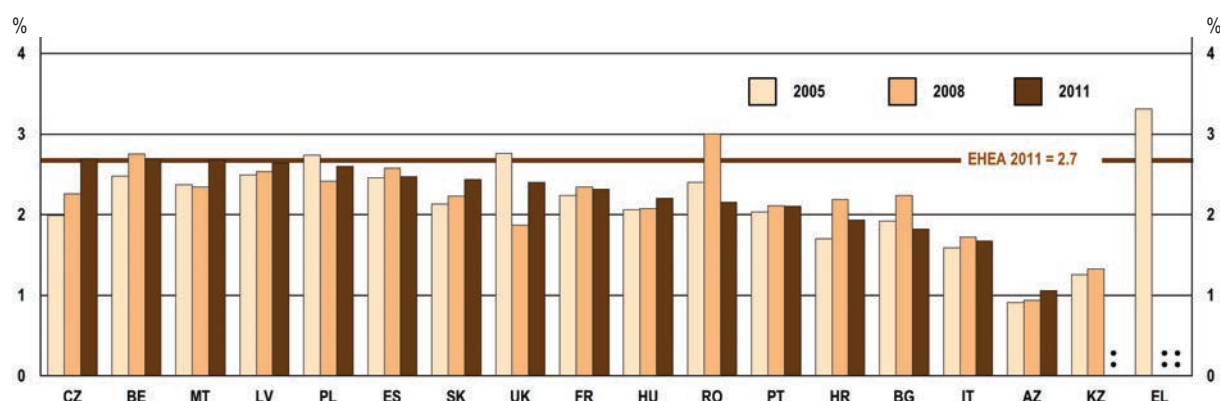
In the first group of EHEA countries (i.e. nearly half of the countries for which data is available) the percentage of total public expenditure devoted to tertiary education is higher in 2011 than in 2005. In these countries, annual public expenditure on tertiary education increased faster than the total public expenditure (or decreased at a slower pace than the total public expenditure). Some countries that belong to this group experienced a decrease of the above-mentioned share in one of the two time periods under scrutiny (either in 2008 compared to 2005 or in 2011 compared to 2008), but this was more than compensated during the second period of time. This is for instance the case of Lithuania, Malta and the Netherlands, which experience a slight decline of the share in 2008 compared to 2005. In Croatia and in Belgium, the stronger public effort recorded in 2008 (compared to 2005) was only partially offset by a weaker effort in 2011 (compared to 2008).

In the second group of countries, public expenditure on higher education grew more or less at the same pace as total public expenditure: hence its share remained roughly unchanged in 2011 compared to 2005. In these countries, the share of total public expenditure allocated to tertiary education changed by a maximum 0.1 percentage point in 2011 compared to 2005. This is what occurred for instance in Switzerland, Spain, Slovenia and Finland.

In the third group of countries (nearly one quarter of EHEA countries for which data is available), public expenditure on tertiary education increased at a slower pace than public expenditure (or decreased more rapidly than public expenditure). In these countries, the percentage of total public expenditure devoted to tertiary education is lower in 2011 than in 2005. This is the case in Norway, Iceland and Ireland where the share of public expenditure aimed at tertiary education is respectively 0.57 pp, 0.42 pp and 0.4 pp lower in 2011 than in 2005. In the other countries of this group, the decrease ranges from 0.14 pp in Poland to 0.36 pp in the United Kingdom when comparing the same reference years.

Figure 1.8: Annual public expenditure on tertiary education as a % of total public expenditure, 2005, 2008 and 2011





	AM	NO	UA	CY	DK	CH	MD	FI	SE	LT	NL	EE	DE	RS	AT	IS	IE	SI
2005	:	5.4	4.1	3.7	4.5	4.0	:	4.0	3.5	3.0	3.3	2.8	2.4	:	3.0	3.4	3.2	2.8
2008	11.2	5.1	4.3	4.4	4.2	3.8	3.7	3.8	3.5	2.7	3.3	2.8	2.8	3.0	3.0	2.6	3.1	2.8
2011	11.1	4.8	4.6	4.6	4.2	4.1	4.0	3.9	3.9	3.8	3.5	3.4	3.1	3.1	3.1	3.0	2.8	2.8

	CZ	BE	MT	LV	PL	ES	SK	UK	FR	HU	RO	PT	HR	BG	IT	AZ	KZ	EL
2005	2.0	2.5	2.4	2.5	2.7	2.5	2.1	2.8	2.2	2.1	2.4	2.0	1.7	1.9	1.6	0.9	1.3	3.3
2008	2.3	2.8	2.3	2.5	2.4	2.6	2.2	1.9	2.3	2.1	3.0	2.1	2.2	2.2	1.7	0.9	1.3	:
2011	2.7	2.7	2.7	2.6	2.6	2.5	2.4	2.4	2.3	2.2	2.2	2.1	1.9	1.8	1.7	1.1	:	:

Notes:

[Source: UOE educ_esms_an20 – FA01_4]

Belgium: Expenditure excludes independent private institutions and the German speaking Community. 2008: Excludes transfers to local governments.

Denmark: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. R&D expenditure is not available. 2009 and 2011: Expenditure excludes independent private institutions.

Ireland: Expenditure for ancillary services is not available.

Greece: 2005: Expenditure at local level of government is not available.

Spain: 2005 and 2008: Expenditure for ancillary services is not available.

Croatia: 2005: Public transfers to other private entities are not available. 2005 and 2008 Scholarships and other grants are not available. 2008 and 2011: Public transfers to private entities other than households are not available; Expenditure excludes independent private institutions. 2011: Excludes local transfers and payments to private entities.

Cyprus: Including financial aid to students studying abroad.

Lithuania: Public transfers to other private entities are not available.

Malta: 2008: Public transfers to private entities are not available.

Portugal: Expenditure for ancillary services is not available. 2005: Expenditure at regional and local levels of government is not available. 2005 and 2008: Imputed retirement expenditure is not available. 2008: Excludes direct expenditure to private institutions at regional level of government. 2008 and 2011: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. 2011: Expenditure at local level of government is not available; Student loans from public sources are not available and public transfers to private entities other than households are not available.

Romania: 2005: Expenditure at local level of government is not available.

Slovakia: Expenditure of ISC 5B is excluded.

Sweden: 2008: Excludes intergovernmental transfers for education.

United Kingdom: 2005: Expenditure for ancillary services is not available.

Iceland: Expenditure for ancillary services is not available. 2008: R&D expenditure is not available.

Source: Eurostat, (UOE data collection) and UIS-UNESCO for Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Kazakhstan, Moldova, Serbia, Russia and Ukraine.

Most EHEA countries have been severely hit by the economic and financial crisis, putting stronger pressure on public budgets and thus on public expenditure on education. It should be noted, however, that since the latest available data in the UOE (Unesco-UIS/OECD/Eurostat) data collection is from 2011, the most recent impact of the economic crisis cannot be seen. For this reason, additional data compiled in accordance with the classification on COFOG (Classification of the Functions of Government) is used to complement the analysis despite technical differences between UOE and COFOG data (see the Glossary and methodological notes).

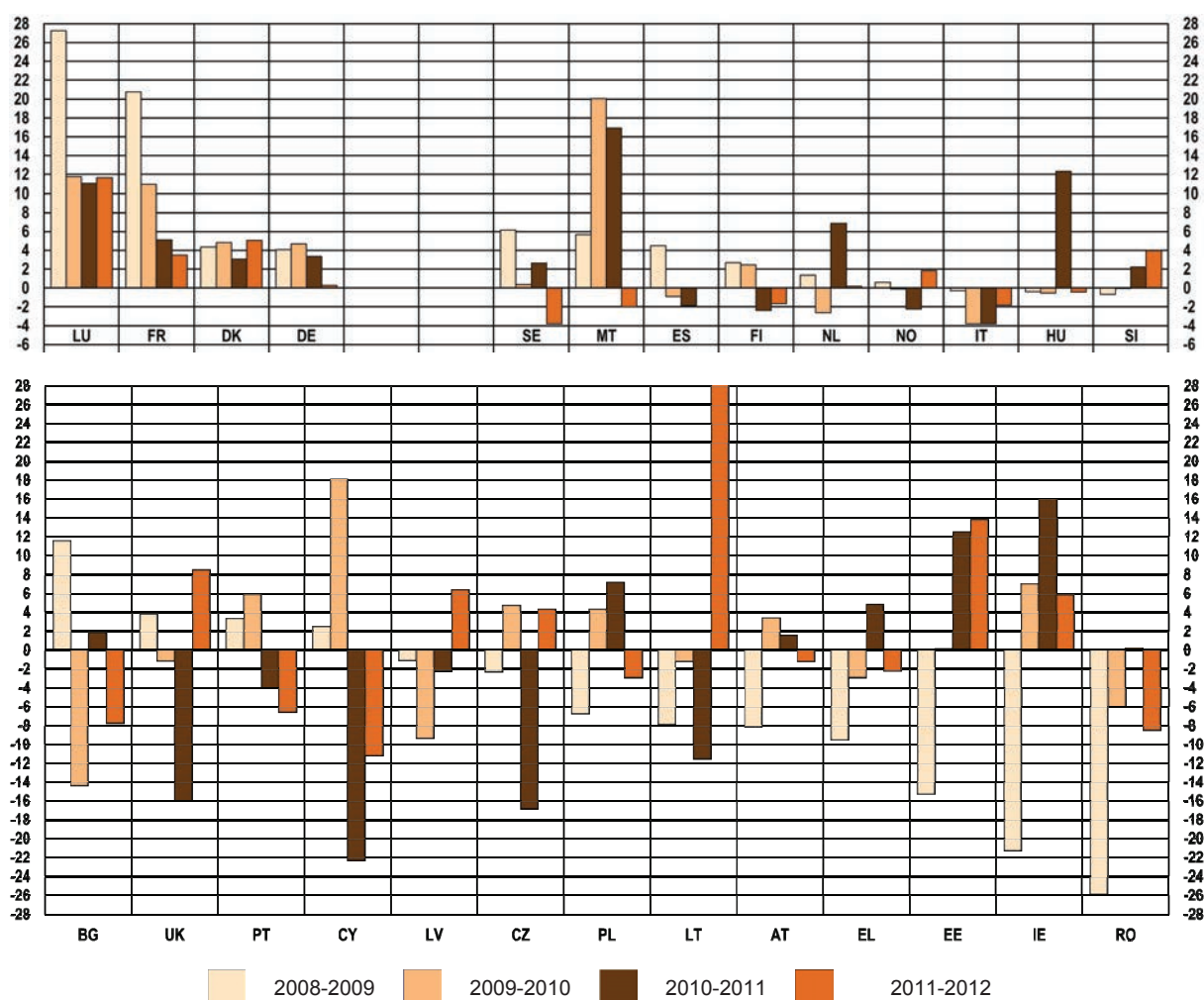
Analysing public expenditure on tertiary education at a constant price allows price distortions over time to be avoided. Within the EHEA, all countries except Luxembourg, France, Denmark and Germany

decreased public expenditure for tertiary education at a constant price at least once in the years between 2008 and 2012. In Luxembourg, the lowest yearly change in public expenditure at this level of education at a constant price was 11 % over this period. In France, public expenditure (constant price) at this level recorded over 10% yearly growth between 2008 and 2010 but growth was much more moderate in the following years. In Denmark and Germany, yearly growth never exceeded 5 % during this period.

In a second group, yearly decrease(s) in public expenditure on tertiary education were relatively small, and never exceeded 5 %. These decreases were usually preceded by relatively greater increases (e.g. Sweden, Spain, Finland) or offset by growth in subsequent years (e.g. the Netherlands, Slovenia). Among this group of countries, Italy is the only one recording four consecutive decreases in public expenditure on tertiary education..

In a third group, countries experienced much more significant decreases (yearly decreases higher than 5 %) either during a single year (the United Kingdom, Portugal, Latvia, the Czech Republic, Austria, Estonia, Ireland and Poland), over two years (Bulgaria, Cyprus, Lithuania) or even over three years (Romania). In all these countries except Lithuania, the level of public expenditure devoted to tertiary education at a constant price was lower in 2011 compared to 2008. The most severe decline can be observed in Romania (-36.2 %). In Lithuania, the increase of public expenditure in tertiary education at current price registered in 2012 is amplified by the decrease in the price index. This leads to an increase of public expenditure of 52.6 % in 2012 at constant prices.

Figure 1.9: Yearly changes in real public expenditure on tertiary education between 2008 and 2012, (price index 2005=100)



	LU	FR	DK	DE	SE	MT	ES	FI	NL	NO	IT	HU	SI
2008-2009	27.3	20.8	4.4	4.1	6.1	5.7	4.5	2.7	1.3	0.6	-0.3	-0.4	-0.7
2009-2010	11.8	10.9	4.8	4.7	0.3	20.1	-0.9	2.5	-2.6	-0.1	-3.8	-0.5	0.0
2010-2011	11.1	5.1	3.1	3.4	2.7	16.9	-1.9	-2.4	6.9	-2.2	-3.8	12.3	2.2
2011-2012	11.6	3.5	5.1	0.3	-3.8	-2.0	:	-1.7	0.2	1.8	-1.8	-0.5	4.0
	BG	UK	PT	CY	LV	CZ	PL	LT	AT	EL	EE	IE	RO
2008-2009	11.5	3.8	3.4	2.6	-1.1	-2.4	-6.7	-7.9	-8.2	-9.5	-15.3	-21.3	-25.9
2009-2010	-14.4	-1.2	5.9	18.2	-9.3	4.7	4.4	-1.2	3.4	-2.9	0.1	7.1	-6.0
2010-2011	1.8	-16.1	-4.1	-22.3	-2.3	-16.9	7.2	-11.5	1.6	4.8	12.6	16.0	0.2
2011-2012	-7.7	8.5	-6.6	-11.2	6.5	4.3	-2.9	52.6	-1.2	-2.3	13.8	5.8	-8.5

Notes:

Within each group, data are sorted by the degree of change between 2008 and 2009.

Source: Eurostat (national accounts, government finance statistics, COFOG).

In addition to public expenditure on tertiary education, private expenditure should also be considered when analysing the investment in tertiary education at national level. Private sources of funding include households (i.e. students and their families) and other private entities such as private businesses and non-profit organisations. Household expenditure includes payments to tertiary educational institutions (e.g. tuition fees, administrative fees, laboratory fees, lodging and any other welfare services, etc.) and for educational goods and services outside tertiary educational institutions. Private entities (e.g. private companies, private foundations) other than households may also contribute to tertiary education through contracts for research or training, grants or charitable donations, as well as financial aids to students (scholarship, grants or loans). In this latter case, expenditure from other private entities is directed to students and households but not tertiary educational institutions.

Looking at the total public and private annual expenditure per student allows a comparison of the total financial investment of a country in relation to the size of its student population. In 2011, half of the EHEA countries spent more than PPS⁶ 8 850 per student with a maximum of PPS 15 987 in Denmark, while the other half of EHEA countries spent less with a minimum at PPS 3 255 (Romania). The EHEA displays wide disparities since the highest level of expenditure per full-time equivalent student is five times higher than the lowest one. Expenditure per full-time equivalent student is the highest of the EHEA (more than PPS 13 500) in four of the Nordic countries (Denmark, Sweden, Norway and Finland) and stands at more than PPS 10 000 in some other countries. However, the majority of countries for which data is available spend less than PPS 10 000.

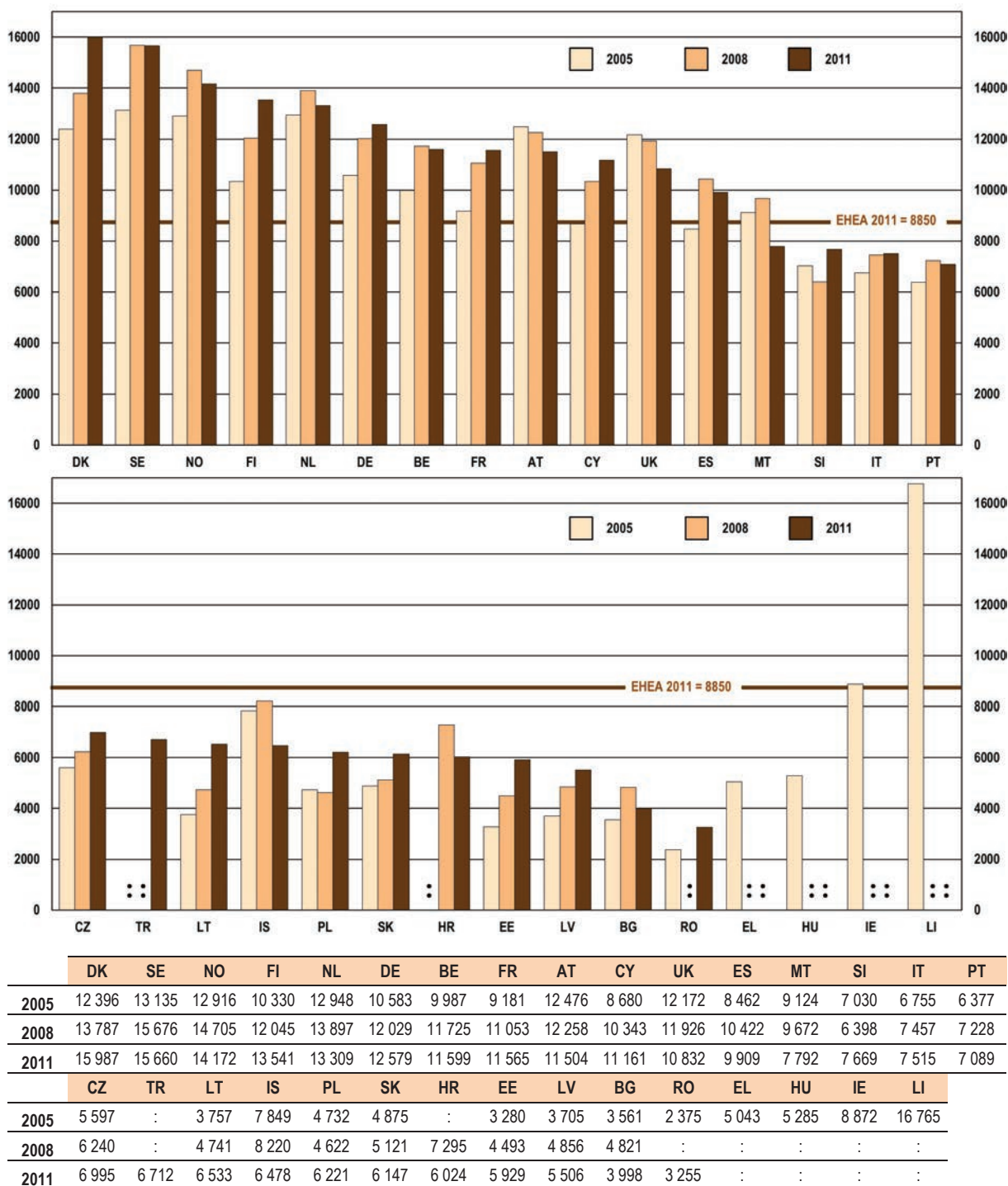
The differences observed in terms of annual expenditure per full-time equivalent student should also be considered in relation to the situation some years ago. The highest increase in annual expenditure per full-time student took place in the Baltic countries. In 2011, investment per full-time student increased by 80.8 %, 73.9 % and 48.6 % compared to 2005 in Estonia, Lithuania and Latvia respectively. Such increases may be caused by more investment in tertiary education but they might also be amplified by a decrease or a slower growth in the student population.

Romania increased its investment per full-time equivalent student by 37.1 % in 2011 compared to 2005 and, according to this indicator, is therefore among the countries with the highest growth rates in the EHEA area. In reality, however, Romania saw a strong decrease in the number of tertiary students (see Figure 1.3) and a decline of real public expenditure on tertiary education (see Figure 1.10). At the

⁽⁶⁾ The purchasing power standard, abbreviated as PPS, is an artificial currency unit. Theoretically, one PPS can buy the same amount of goods and services in each country. For more details please see: http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Glossary:Purchasing_power_standard_%28PPS%29

other end of the spectrum, expenditure per full-time equivalent student is lower in 2011 compared to 2005 in Austria (-7.8 %), the United Kingdom (-11 %), Malta (-14.6 %) and Iceland (-17.5 %). Despite such decreases, expenditure per full-time student in Austria and the United Kingdom remains over PPS 10 000.

Figure 1.10: Annual expenditure on tertiary education per full-time equivalent student in PPS, 2005, 2008 and 2011



Notes:

[Source: UOE educ_fitotin – FA01_4]

Belgium: Expenditure exclude independent private institutions and the German speaking Community.

Denmark: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. R&D expenditure is not available. 2005 and 2011: Payments from other private entities to educational institutions are not available. 2008 and 2011: Expenditure for independent private educational institutions is not available.

Ireland: 2005: Expenditure for ancillary services is not available.

Spain: 2005 and 2008: Expenditure for ancillary services is not available.

Croatia: 2008: Capital expenditure from private educational institutions is not available. 2008: Expenditure for compensation of personnel in private educational institutions is not available. 2008 and 2011: Payments from international agencies and other foreign sources to independent private educational institutions are not available. 2008: Expenditure for independent private educational institutions is not available.

Austria: 2005: Payments from international agencies and other foreign sources to educational institutions are not available. 2008: Payments from private entities other than households to public educational institutions are not available.

Poland: Payments from other private entities to educational institutions are not available. 2005 and 2008: Payments from international agencies and other foreign sources to educational institutions are not available.

Portugal: Expenditure at local level of government is not available. 2008 and 2011: Expenditure of post secondary non-tertiary level of education is partially included in upper secondary and tertiary level of education. 2005 and 2008: Imputed retirement expenditure is not available; Payments from international agencies and other foreign sources to educational institutions are not available. 2005: Expenditure at regional and local levels of government is not available; Payments from other private entities to educational institutions are not available.

Slovenia: 2008: Capital expenditure from private educational institutions is not available.

Slovakia: Expenditure of ISC 5B is not included. 2008: Expenditure for independent private educational institutions is not available. Payments from international agencies and other foreign sources to private educational institutions are not available.

United Kingdom: 2005: Expenditure for ancillary services is not available. Adjustment of educational expenditure of financial year, that is running from 1st of April to 31st of March, to the calendar year.

Iceland: 2005 and 2008: Expenditure for ancillary services is not available; Payments from other private entities and payments from international agencies and other foreign sources to educational institutions are not available. 2008: Capital expenditure from private educational institutions is not available. 2008 and 2011: R&D expenditure is not available.

Norway: 2005 and 2008: Payments from other private entities to educational institutions are not available. Payments from international agencies and other foreign sources to educational institutions are not available.

Source: Eurostat (UOE data collection).

The analysis of expenditure on tertiary education should consider the population of students enrolled in tertiary education (aligned to data on educational finance) but might also take into account the wealth of each country: a positive relationship between expenditure per student and the GDP per inhabitant is expected. The level of the GDP per capita could be considered as the country's ability to pay for the tertiary education of its population. Cross-country comparison of this indicator is easier for primary and secondary education as enrolment rates across countries show similar levels. Indeed, in countries where primary and secondary education is nearly universal, this indicator informs about the amount that is spent per pupil. For higher education, cross-country comparison is more complex as enrolment rates vary in greater proportions: countries where the enrolment rate is low could show higher expenditure per full time equivalent students than countries with higher enrolment rates.

The positive relationship between the wealth of a country (expressed by the GDP per capita) and the investment per student is clearly identifiable in Europe. However, this relationship does not imply a direct causal relationship between the two variables in the short term. Indeed, public expenditure (i.e. the major part of total expenditure on tertiary education) involves long-terms commitments (capital expenditure or staff salaries) and cannot be adjusted rapidly to the economic recession; the number of students is the result of multi-cohorts behaviors and their attitudes towards tertiary education.

This indicator reveals that countries that have different levels of GDP per capita and annual expenditure per student, make a similar relative financial effort towards tertiary education. For instance, Turkey spends slightly more than 50 % of its GDP per capita on each tertiary student which is nearly as much as Denmark and slightly more than Sweden while its GDP per capita and annual expenditure per student are less than half of the one in these two countries in 2011.

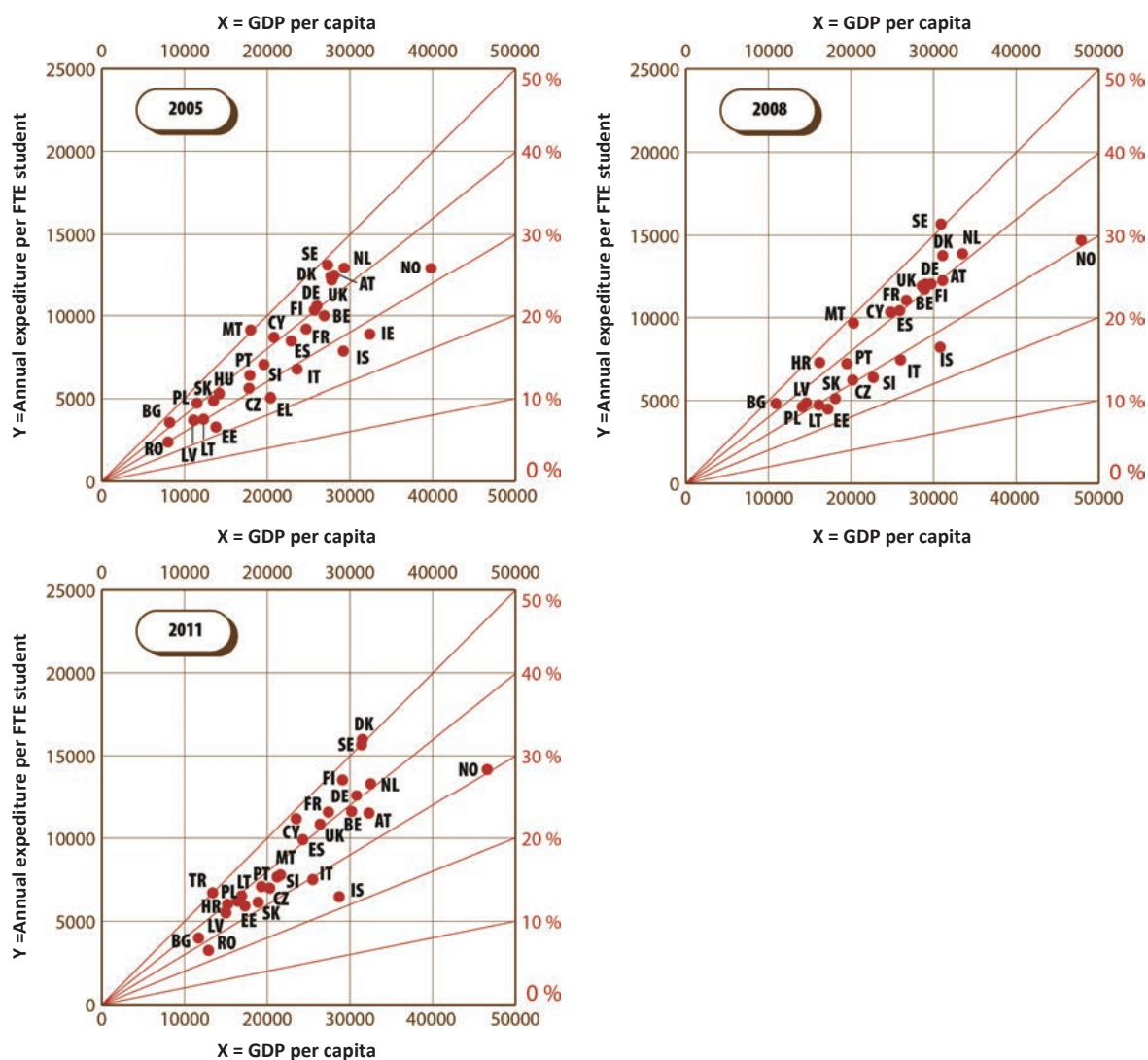
The economic and financial crisis provoked a decrease in the GDP per capita in numerous European countries when comparing 2011 with 2008. In these countries, investment per tertiary student decreased at a slower pace than GDP per capita (Spain); at a faster pace than GDP per capita (the Netherlands, Portugal, the United Kingdom, Croatia, Iceland and Norway); or still increased (Italy, Cyprus, Slovenia and Finland).

The above-mentioned countries show different profiles when considering the pre-crisis period. More than half of them increased their GDP per capita faster than expenditure per students (Cyprus, the Netherlands, Slovenia, the United Kingdom, Iceland and Norway). In Slovenia and the United Kingdom, expenditure per full time equivalent student was even on a downward trend. In the others

group of countries, the annual public expenditure on tertiary education per full-time equivalent student in PPS relative to the GDP per inhabitant increased during the pre-crisis period.

Investment per tertiary student also decreased in countries where the GDP per capita grew in 2011 compared to 2008. This situation occurs in Belgium, Bulgaria, Malta, Austria and Sweden. Among all these countries, expenditure per tertiary student was already on a negative trend in Austria (i.e. in 2008 compared to 2005).

Figure 1.11: Annual public expenditure on tertiary education per full-time equivalent student in PPS relative to the GDP per inhabitant in PPS, 2005, 2008 and 2011



	DK	TR	SE	CY	FI	FR	DE	ES	NL	UK	HR	LT	BE	PL	PT	LV
2005	44.7	:	48.1	41.6	40.3	37.2	40.7	36.9	44	44.1	:	30.6	37.1	41.1	35.7	33.3
2008	44.3	:	50.7	41.6	40.5	41.4	41.5	40.2	41.4	39.9	44.9	29.4	40.6	32.9	37.1	33.3
2011	50.8	50.2	49.9	47.3	46.6	42.2	40.8	40.8	40.7	40.4	39.7	39.2	38.5	38	36.7	36.6
	SI	MT	AT	CZ	BG	EE	SK	NO	IT	RO	IS	EL	HU	IE	LI	
2005	35.8	50.5	44.4	31.4	43.3	23.7	36.1	32.4	28.5	30.2	26.8	24.8	37.3	27.3	26.8	
2008	28.2	47.7	39.4	30.8	44.4	26.1	28.3	30.7	28.6	:	26.7	:	:	:	:	
2011	36.5	36	35.6	34.7	34.2	34.1	32.5	30.4	29.5	27.5	22.5	:	:	:	:	

Notes:

Belgium: Expenditure exclude independent private institutions and the German speaking Community. 2005 and 2008: Payments from private entities other than households to educational institutions are not available for primary and secondary education in the Flemish Community.

Denmark: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. R&D expenditure is not available. 2005 and 2011: Payments from other private entities to educational institutions are not available. 2008 and 2011: Expenditure for independent private educational institutions is not available.

Ireland: 2005: Expenditure for ancillary services is not available.

Spain: 2005 and 2008: Expenditure for ancillary services is not available.

Croatia: 2005 and 2008: Capital expenditure from private educational institutions is not available. 2008: Expenditure for compensation of personnel in private educational institutions is not available; Expenditure for independent private educational institutions is not available. 2008 and 2011: Payments from international agencies and other foreign sources to independent private educational institutions are not available.

Austria: 2005: Payments from international agencies and other foreign sources to educational institutions are not available. 2008: Payments from private entities other than households to public educational institutions are not available.

Poland: Payments from other private entities to educational institutions are not available. 2005 and 2008: Payments from international agencies and other foreign sources to educational institutions are not available.

Portugal: Expenditure at local level of government is not available. 2005: Expenditure for ancillary services is not available. 2008 and 2011: Expenditure of post secondary non-tertiary level of education is partially included in tertiary level of education. 2008: Imputed retirement expenditure is not available. 2005: Expenditure at regional and local levels of government is not available; Payments from other private entities to educational institutions are not available. 2005 and 2008: Payments from international agencies and other foreign sources to educational institutions are not available.

Slovenia: 2008: Capital expenditure from private educational institutions is not available.

Slovakia: Expenditure of ISC 5B is not included. 2008: Expenditure for independent private educational institutions is not available. Payments from international agencies and other foreign sources to private educational institutions are not available.

United Kingdom: 2005: Expenditure for ancillary services is not available.

Iceland: 2005 and 2008: Expenditure for ancillary services, payments from other private entities to educational institutions and payments from international agencies and other foreign sources to educational institutions are not available. 2008: Capital expenditure from private educational institutions is not available. 2008 and 2011: R&D expenditure is not available.

Norway: 2005 and 2008: Payments from other private entities to educational institutions are not available. Payments from international agencies and other foreign sources to educational institutions are not available.

Source: Eurostat.

In a first group of countries (more than half of the countries for which data is available) the growth of the annual expenditure per student in 2011 compared to 2005 is higher than the one of the GDP per capita. Within this group, several patterns could be observed. In Belgium, Portugal and Sweden, annual expenditure per student increased at a higher pace than the GDP per capita in 2008 compared to 2005 while the opposite occurred during the second period of time (GDP per capita increased at a faster pace than expenditure per students in 2011 compared to 2008). In the second group of countries (Czech Republic, Denmark, Cyprus and Slovenia), the stronger increase in annual expenditure per student than that of GDP per capita (in 2011 compared 2008) explains the growth in the share of GDP per capita devoted to higher education. Annual expenditure per student increased at a faster pace than the wealth of the country during both periods of time in Estonia, France, Italy, Latvia, Lithuania and Finland. In Spain, annual expenditure per student decreased less than the GDP per capita which explains the growth in the proportion of GDP per capita devoted to expenditure per student.

In the second group of countries (Bulgaria, the Netherlands, Poland, Romania, Slovakia and Norway), expenditure per tertiary students increased at a slower rhythm than the GDP per inhabitant leading to a decreasing share of the GDP per capita invested in tertiary education in 2011 compared to 2005.

Finally, four countries lowered their investment per student in 2011 compared to 2005 while their GDP per capita increased (Malta and Austria) or decreased (the United Kingdom and Iceland).

CHAPTER 2: DEGREES AND QUALIFICATIONS

The Bucharest Communiqué

Adoption of a system of easily readable and comparable degrees with the aim of promoting the employability of European citizens and the international competitiveness of European higher education is a core action line of the Bologna Declaration itself. In Bucharest in 2012 ministers acknowledged the significant progress that has been made, stating that, 'higher education structures in Europe are now more compatible and comparable' ⁽¹⁾. However, they also recognised that

we must make further efforts to consolidate and build on progress. We will strive for more coherence between our policies, especially in completing the transition to the three cycle system, the use of ECTS credits, the issuing of Diploma Supplements, the enhancement of quality assurance and the implementation of qualifications frameworks, including the definition and evaluation of learning outcomes ⁽²⁾.

Ministers also committed themselves to examining national legislation and practices relating to joint programmes and degrees as a way to dismantle obstacles to cooperation and mobility embedded in national contexts, encouraging higher education institutions to further develop joint programmes and degrees as part of a wider EHEA approach.

The Bucharest Communiqué also acknowledges that realising the full benefits of qualifications frameworks can in practice be more challenging than developing the structures and that the development of qualifications frameworks must continue so that they become an everyday reality for students, staff and employers. Ministers also invited countries that could not finalise the implementation of national qualifications frameworks compatible with QF-EHEA by the end of 2012 to redouble their efforts.

With regard to recognition, Ministers welcomed the European Area of Recognition (EAR) Manual and recommended its use as a set of guidelines for recognition of foreign qualifications and a compendium of good practices, as well as encouraged higher education institutions and quality assurance agencies to assess institutional recognition procedures in internal and external quality assurance. They also declared their determination to remove outstanding obstacles hindering effective and proper recognition and their willingness to work together towards the automatic recognition of comparable academic degrees, building on the tools of the Bologna framework, as a long-term goal of the EHEA. Ministers therefore committed to reviewing national legislation to comply with the Lisbon Recognition Convention and pledged to support the work of a pathfinder group of countries exploring ways to achieve the automatic academic recognition of comparable degrees.

The 2012 Bologna Implementation Report

The 2012 report provided evidence of change to higher education systems brought about through Bologna process reforms. In particular the commitment to establish three cycle degree structures was being implemented in all countries, with the majority of countries having high percentages of their students in programmes corresponding to the Bologna system. Indeed the mapping showed that only countries where legislative reforms had been introduced relatively late still maintained a majority of students in other types of higher education programme.

⁽¹⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012

⁽²⁾ Ibid.

While progress was also evident on establishing National Qualifications Frameworks, and in using Bologna tools (ECTS, Diploma Supplement), a number of questions remained open regarding the way in which instruments are understood and implemented. The findings of the report also raised concerns that, despite the reforms in degree structures, problems of recognition of qualifications and credits still persist.

BFUG Working Group on Structural Reforms

The 2012-2015 Working Group on Structural Reforms was mandated to develop proposals for policy and practice aiming to improve instruments for structural reform: qualifications frameworks, quality assurance, recognition of qualifications and transparency instruments as well as the coherence between the main elements of structural reform within the European Higher Education Area as well as to oversee and advise the BFUG on the implementation of structural reforms.

Close cooperation between the Reporting Working Group and the Working Group on Structural Reforms Working group facilitated the work in this report on Degrees and Qualifications.

Chapter outline

This chapter deals with the basic structures and tools of the Bologna Process and with recognition. The first section is devoted to the implementation of the three-cycle degree structure. The second section covers the Bologna tools – National Qualifications Frameworks, ECTS, and the Diploma Supplement. Section 3 examines recognition issues and the implementation of the Lisbon Recognition Convention ⁽³⁾.

2.1. Structure and implementation of the Bologna three-cycle system (BA, MA, PhD)

The commitment to adopt easily readable and comparable degrees and to establish a two-cycle system are mentioned as the two first action lines in the 1999 Bologna Declaration originally signed by 29 countries and now being implemented in the 47 countries constituting the European Higher Education Area. The stage of implementation of the two cycles has been an important goal of the Bologna process and therefore it has been addressed in all the reports prepared for the Bologna Ministerial summits in 2005, 2007, 2009, 2010 and 2012. Since 2012 the data for this indicator is collected by Eurostat, thus adding precise statistical data to complement the comparisons based on the BFUG qualitative survey. The overarching qualifications framework for the EHEA adopted in 2005 sets credit ranges: 180-240 ECTS credits for the first cycle and 90-120 credits with at least 60 credits at second-cycle level.

This section considers how successful the implementation of the two cycles has been, and also provides a more detailed look at the typical models of the two-cycle system that have emerged. In addition to analysis of the changes in access between Bologna cycles, the report provides information on which countries regulate the minimum total student workload of the two cycles together. The report also follows the implementation of the third cycle (doctorates) which was introduced to the Bologna Process structural objectives in 2003 (Berlin Communiqué) as well as issues regarding the links between short-cycle studies and the first cycle.

2.1.1. Stage of implementation of the three cycles

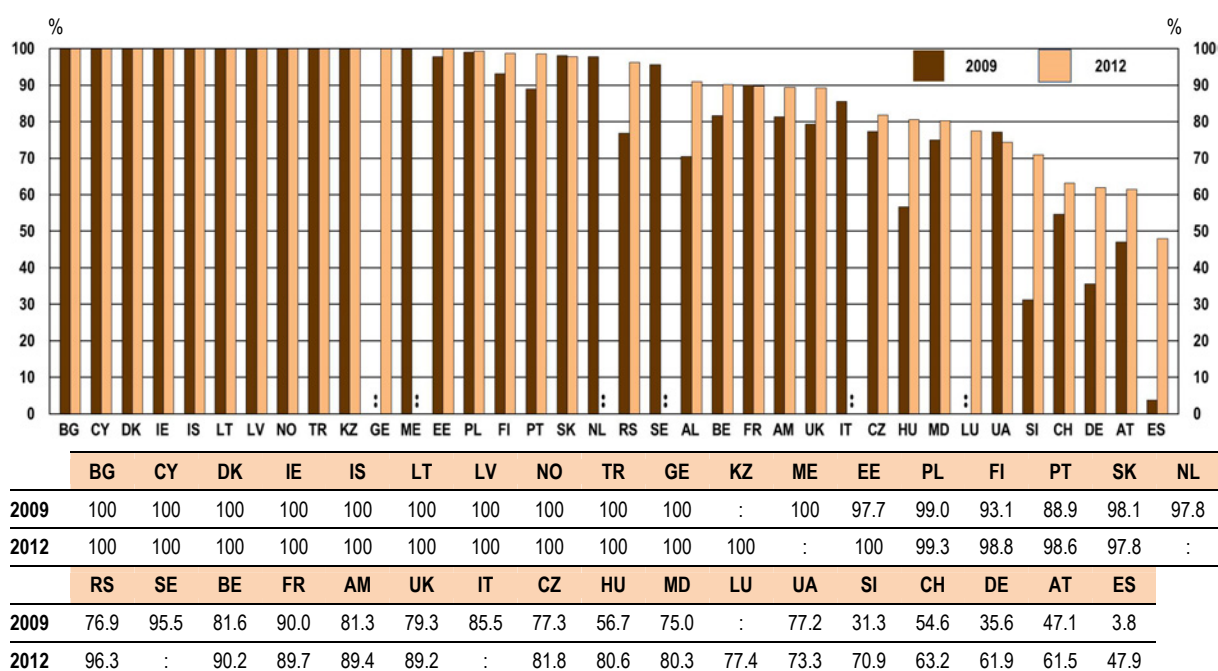
One way to monitor the stage of implementation of the Bologna model is to analyse the percentage of students enrolled in programmes following the Bologna three-cycle structure considering how it

⁽³⁾ Convention on the Recognition of Qualifications concerning Higher Education in the European Region, Lisbon, 11 April 1997.

changed between 2009 and 2012. A high value of this percentage suggests that the Bologna structure is nearly fully implemented in the country concerned while a low value highlights the opposite.

Overall in 2012, with the exception of Spain, a majority of students in countries where data are available are enrolled in programmes following the Bologna three-cycle structure. In more than one third of the EHEA countries shown, the Bologna model is fully implemented (i.e. all students are enrolled according to the Bologna framework). In another third, more than 89 % of students are enrolled in the Bologna three-cycle structure. In the remaining countries, with the exception of Switzerland (63.2 %), Germany (61.9 %), Austria (61.5 %) and Spain (47.9%) more than 70 % of students are enrolled in three-cycle programmes.

Figure 2.1: Percentage of students enrolled in programmes following the Bologna three-cycle structure, 2008/09 and 2011/12



Notes:

Belgium (Flemish Community): The programmes outside the Bologna structure concern the ISCED 5B, short cycle programmes offered by the Centres for Adult Education. The number of students enrolled on those programmes amounts to about 9.8% of the total number of students.

Switzerland: the low figures are explained by the fact that the professional education and training system is located at ISCED level 5B. These qualifications are not compatible with the Bologna model, as they often consist of an examination for which the student can take voluntary preparatory courses

Source: Eurostat, UOE and additional collection for the other EHEA countries.

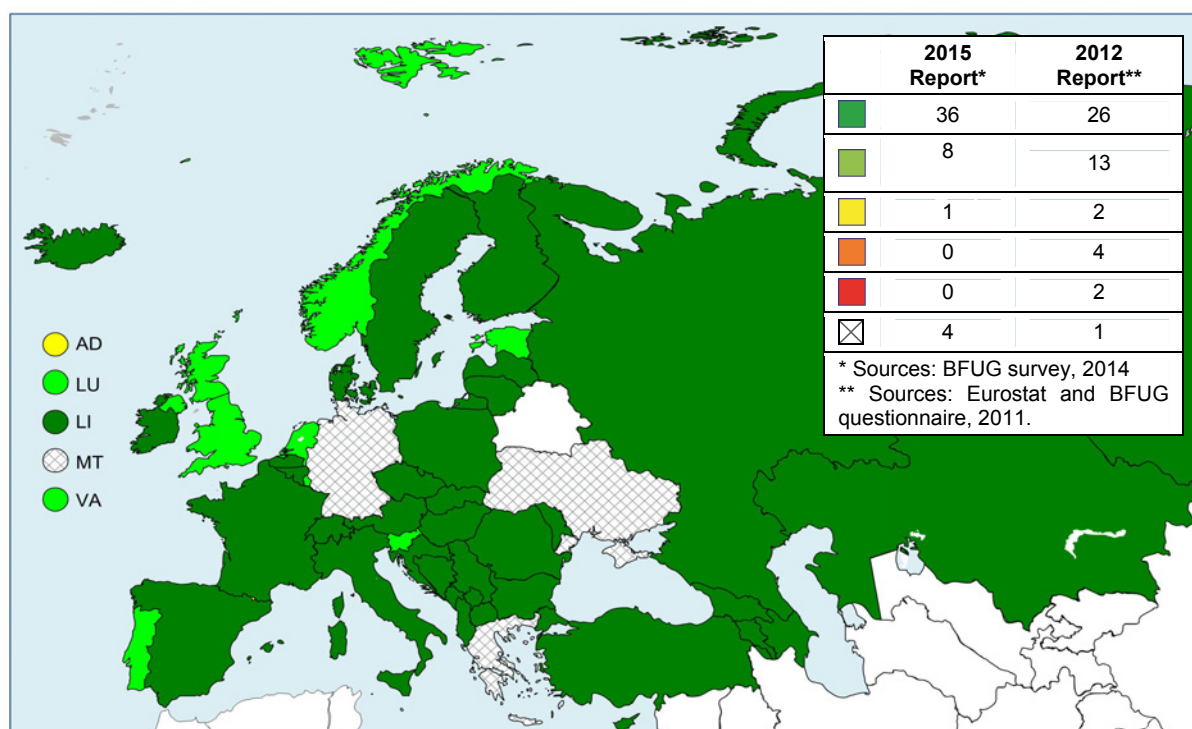
A comparison of data from 2009 and 2012 demonstrates that, apart from the 11 countries which already had 100% Bologna structure in 2009, 19 other countries have progressed in the implementation of the Bologna model. The greatest progress happened in some of the countries which chose an unhurried and seemingly slower step-by-step implementation model in the first stages of the Bologna process, but have sped up implementation in recent years. In Spain, for example, the percentage of students enrolled in the Bologna structure increased by 44 percentage points (pp) from 3.8 % of all students to almost 48 %. In Slovenia, this percentage reaches nearly 71 % (an increase of 40 pp compared to 2009). Germany and Hungary also register a significant development of the Bologna model with increases of 26 pp and 24 pp respectively. In Serbia, the percentage of students enrolled in the Bologna structure reached 96 % in 2012 (a 19 pp increase compared to 2009).

It should, however, be recognised that the latest Eurostat data goes up to 2012 only. For data on the progress between 2012 and 2014, information is provided in Figure 2.2, and is based on BFUG survey

data. Data have been collected for both the share of students in Bologna structures and the share of programmes.

Scorecard indicator No1 shows that the first and second cycles are close to being fully implemented. Country explanations confirm that the seven countries which score “light green” (Estonia, Holy See, the Netherlands, Norway, Portugal, Switzerland and United Kingdom-Scotland) have a high number of students studying in programmes leading to qualifications in regulated professions which are not following the typical bachelor-master pattern. Norway explains that while these programmes are not structured in the Bologna two-cycle model, other aspects of the Bologna process, such as the use of ECTS and learning outcomes, have been fully implemented.

Figure 2.2: Scorecard indicator n°1: Stage of implementation of the first and second cycle, Data from BFUG survey, 2013/14



Notes:

1. The indicator is defined as the share of students studying in the programmes belonging to the Bologna model (in %).
BFUG survey data is reflecting the situation in 2013/14.

2. Germany, Greece, and Malta could not provide the share of students studying in the programmes belonging to the Bologna model. However, these three countries all have more than 90% of the study programmes belonging to the Bologna model.

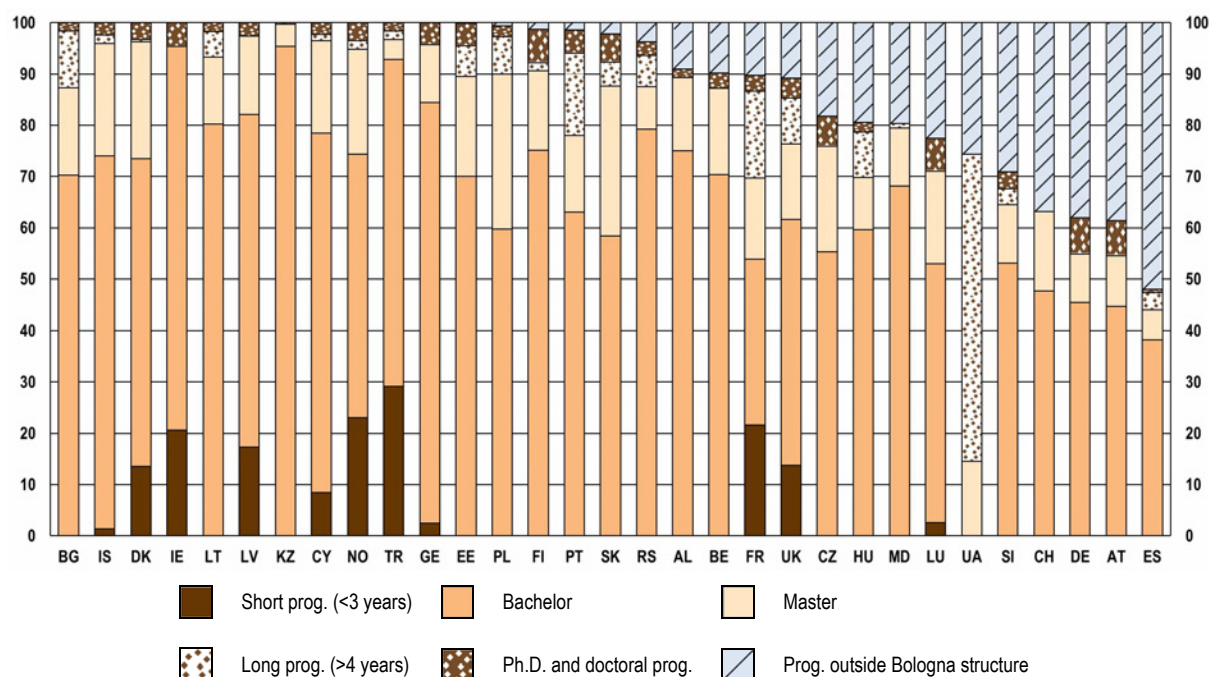
Scorecard categories

- At least 90 % of all (4) students are enrolled in a two-cycle degree system that is in accordance with the Bologna principles
 - 70-89 % of all students are enrolled in a two-cycle degree system that is in accordance with the Bologna principles
 - 50-69 % of all students are enrolled in a two-cycle degree system that is in accordance with the Bologna principles
 - 25-49 % of all students are enrolled in a two-cycle degree system that is in accordance with the Bologna principles
 - less than 25 % students are enrolled in a two-cycle degree system that is in accordance with the Bologna principles
- OR**
- Legislation for a degree system in accordance with the Bologna principles has been adopted and is awaiting implementation

Figure 2.3 presents the distribution of students in the three cycles, and is based on Eurostat 2011/12 data. It illustrates that in 12 out of the 31 higher education systems for which data is available all students were enrolled in programmes following the three-cycle structure, and in a further four systems less than 5% students followed programmes outside the Bologna framework.

Figure 2.3 also shows that in two thirds of the EHEA countries for which data is available, more than half of the students were enrolled in first cycle (bachelor) programmes. In this group of countries, first cycle enrolments range from 50.4 % of the total student population (Luxembourg) to 95.4 % (Kazakhstan). Conversely, first cycle students represent less than 40 % of the total student population in Spain (38.3 %) and France (32.3 %).

Figure 2.3: Distribution of students enrolled in programmes following the Bologna three-cycle structure, by cycle, 2011/12



(4) "All" = All students who could be involved in the 2-cycle system i.e. NOT those in doctoral programmes and NOT those in short higher education programmes. Students of ALL study fields are taken into account.

	BG	IS	DK	IE	LT	LV	KZ	CY	NO	TR	GE	EE	PL	FI	PT	SK
Short prog. (<3 years)	0.0	1.4	13.6	20.6	0.0	17.3	0.0	8.4	23.1	29.2	2.5	0.0	0.0	0.0	0.0	0.0
Bachelor	70.3	72.7	59.9	74.7	80.2	64.8	95.4	70.1	51.3	63.6	81.9	70.1	59.8	75.1	63.1	58.4
Master	17.1	21.9	22.9	0.0	13.1	15.3	4.3	18.0	20.4	3.9	11.3	19.5	30.1	15.5	14.9	29.3
Long prog. (>4 years)	11.0	1.7	0.4	0.0	5.0	0.0	0.0	1.3	1.7	1.7	0.0	6.0	7.4	1.6	16.1	4.6
Ph.D. and doctoral prog.	1.7	2.4	3.3	4.6	1.7	2.6	0.3	2.2	3.5	1.7	4.3	4.5	2.0	6.5	4.6	5.5
Prog. outside Bologna structure	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.2	1.4	2.2
	RS	BE	FR	UK	CZ	HU	MD	LU	UA	SI	CH	DE	AT	ES	MK	
Short prog. (<3 years)	0.0	0.0	21.6	13.8	0.0	0.0	0.0	2.6	:	0.0	0.0	0.0	0.0	0.0	:	
Bachelor	79.3	70.3	32.3	47.9	55.3	59.6	68.1	50.4	:	53.1	47.7	45.5	44.8	38.3	:	
Master	8.2	16.9	15.8	14.7	20.5	10.3	11.3	18.0	14.6	11.4	15.5	9.3	9.7	5.9	:	
Long prog. (>4 years)	6.2	0.0	17.0	9.0	0.0	8.9	0.8	0.0	58.7	3.1	0.0	0.0	0.0	3.2	:	
Ph.D. and doctoral prog.	2.6	3.0	3.1	3.8	5.9	1.9	0.0	6.4	:	3.3	0.0	7.1	7.0	0.6	:	
Prog. Outside Bologna structure	3.7	9.8	10.3	10.8	18.2	19.4	19.7	22.6	26.7	29.1	36.8	38.1	38.5	52.1	100.0	

Notes:

Belgium (Flemish Community): The programs outside the Bologna structure concern the ISCED 5B, short cycle programmes offered by the Centres for Adult Education. The number of students enrolled on those programmes amounts to about 9.8% of the total number of students.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

Short or short-cycle (less than three years) programmes do not exist in more than half of the EHEA countries. Fewer than 5 % of tertiary students are enrolled in them in Iceland (1.4 %), Georgia (2.5 %), Luxembourg (2.6 %) and under 10 % of students in Cyprus (8.4 %). Short programmes are most common in Turkey (29.2 %), Norway (23.1 %), France (21.6 %) and Ireland (20.6 %).

Long (four years or more) programmes are offered in nearly two-thirds of this group of countries. However, the percentage of tertiary students concerned is very low (less than 2 %) in numerous countries (e.g. Finland, Iceland, Cyprus, Moldova, Turkey and Denmark) and exceeds 10 % of the student population only in Bulgaria (11 %), Portugal (16.1 %) and France (17 %).

In the EHEA, the third cycle of the Bologna structure (i.e. Ph.D. and doctoral programmes) usually accounts for less than 5 % of enrolled students. The exceptions are Finland, Slovakia, the Czech Republic, Luxembourg, Germany and Austria.

Countries that still need to progress in the implementation of the Bologna structure show different student enrolment patterns. In Austria and Germany, a majority of the students (60.2 % and 50.2 % respectively) who are not covered by the Bologna structure are enrolled in programmes leading to a first degree lasting 5 years or more (ISCED level 5A). In Spain 44.4 % of the “non-Bologna students” are enrolled in a long first degree (ISCED level 5A), 20 % are studying for a first degree lasting from 3 to less than 5 years (at ISCED level 5A) and 31.4 % are studying for a first qualification provided by more professionally oriented tertiary programmes (ISCED level 5B).

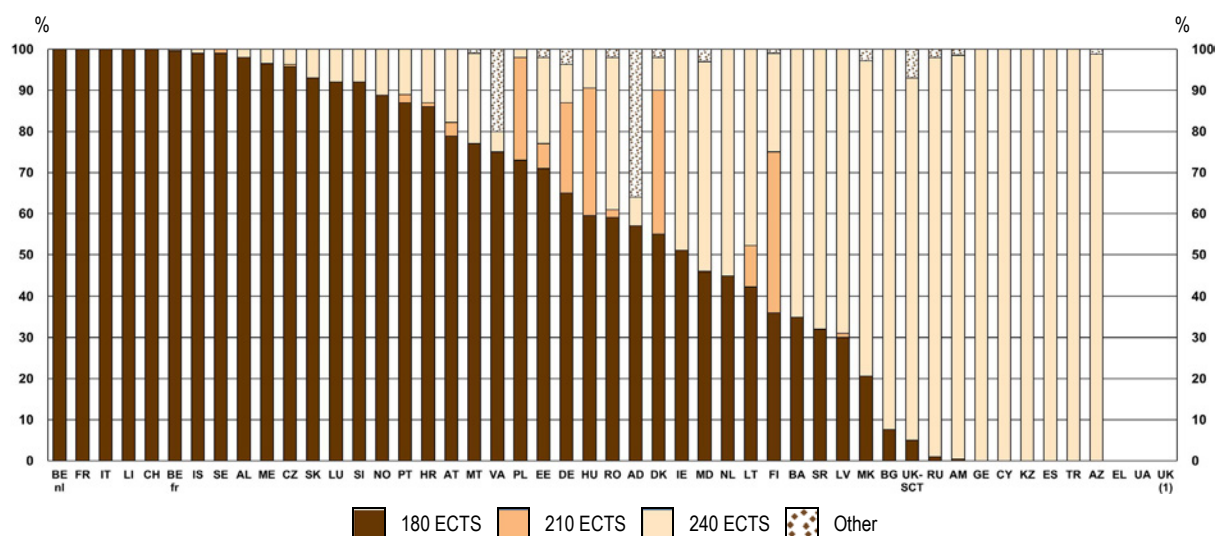
Switzerland displays a more specific pattern for tertiary students ‘outside the Bologna structure’: the majority of these students (56.1 %) are enrolled for a first qualification at ISCED level 5B, while 22.2 % are studying for an advanced research qualification (ISCED level 6). In Slovenia the majority of students studying outside of the Bologna structure (56.6 %) are enrolled for a first qualification at ISCED level 5B level, while the others are enrolled for a first degree lasting between 3 and 5 years (ISCED level 5A).

2.1.2. Common models and credit ranges of ECTS

First cycle

While there has clearly been a strong process of convergence in the structure of first cycle programmes, there is no single model of first-cycle programmes in the EHEA (Figure 2.4). Most countries have a combination of 180 ECTS and 240 ECTS, often accompanied by programmes of other durations. The comparison with the 2012 Bologna Implementation Report (European Commission/ EACEA/Eurydice, Eurostat and Eurostudent, 2012) shows a slight trend of more countries moving away from a workload of 180 ECTS. Nevertheless, the 180 ECTS workload model is still the most widespread, with 58% of programmes following it in comparison to the 37% share of the 240 ECTS workload model.

Figure 2.4: Share of first cycle-programmes having workload 180 ECTS credits, 210 Credits and 240 ECTS credits or other number of credits*, 2013/14



Notes:

UK (1) = UK-ENG/WLS/NIR

Greece and United Kingdom (England, Wales and Northern Ireland) could not provide statistical data on the breakdown of second cycle programmes by workload

Ukraine: no data submitted.

Source: BFUG questionnaire

As reported in 2012, Belgium (Flemish Community), France, Italy, Liechtenstein and Switzerland have 180 ECTS first cycle programmes only. In addition, a strong predominance of the 180 ECTS model can be seen in Albania, Belgium (French Community), the Czech Republic, Luxembourg, Montenegro, Norway, Slovakia, Slovenia and Sweden.

The 240 ECTS model is the only model used in Cyprus, Georgia, Kazakhstan, Spain and Turkey, while in Azerbaijan, Armenia, Bulgaria, The former Yugoslav Republic of Macedonia, Russian Federation, Spain and the United Kingdom (Scotland) more than 75 % of programmes follow the 240 ECTS model. The 240 ECTS model also predominates in the Netherlands where, while the share of programmes of 240 ECTS programmes is 45 %, the share of students in this model reaches 70 %.

The 210 ECTS model is not widespread in the EHEA. However, it is significant in five countries: Denmark (35%), Finland (39%), Germany (20%), Hungary (31%) and Poland (25%). In most of these countries the 210 ECTS workload structure is used in professional/applied bachelor programmes where up to 30 ECTS credits are allocated for professional training or placements.

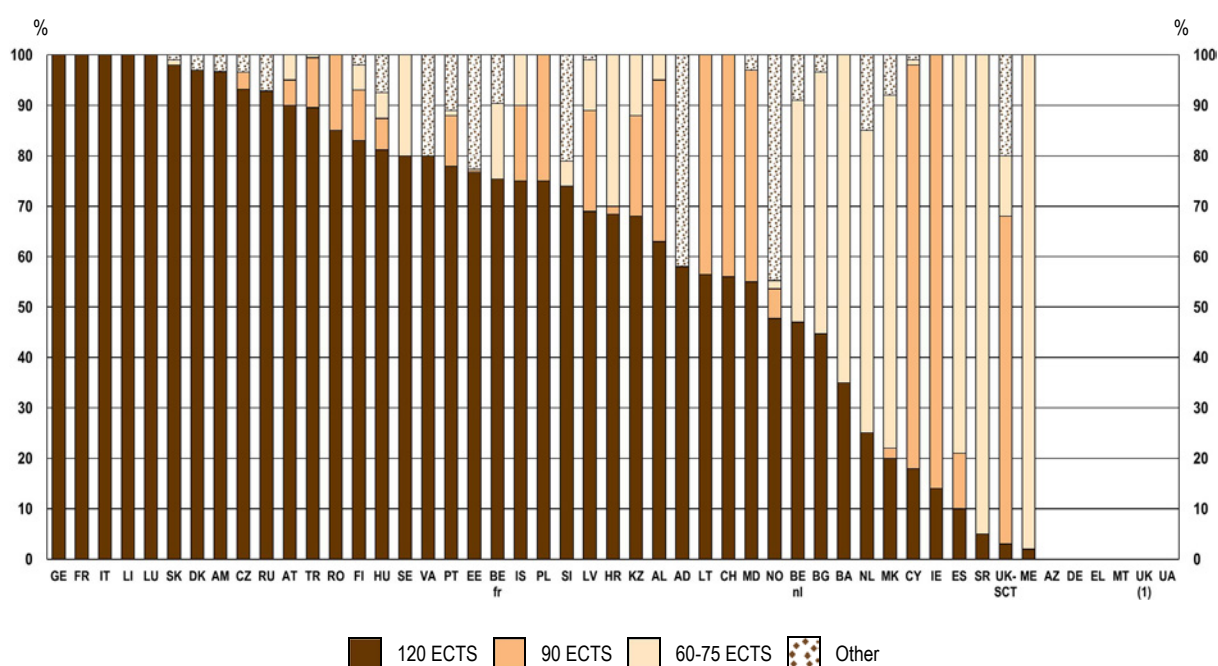
Nearly half of the countries (23) confirmed that academic and professional programmes are structured differently in their higher education systems, for example having a different duration. In the first cycle, professional programmes tend to be longer. This is the case in Denmark, Estonia, Finland, Hungary, Latvia and the Netherlands, where professional programmes have a workload of 210 or 240 ECTS credits while academic programmes typically require 180 ECTS credits. The opposite reality can be found in Bulgaria, where academic programmes require 240 ECTS credits but professional programmes require 180 ECTS credits.

Some countries point to structural differences for programmes leading to regulated professions, particularly those governed by the EU directives 2005/36/EC and 2013/55/EU.

Second cycle

In the second cycle (Figure 2.5), the 120 ECTS model is by far the most widespread, being present in 43 higher education systems. 120 ECTS credits is the sole model in Azerbaijan, France, Georgia, Italy, Liechtenstein and Luxembourg and is used in more than 75 % programmes in a further 21 systems. Since 2012, Albania, Armenia and Turkey have diversified their programme offer, after previously using only the 120 ECTS model in the second cycle. On average, in the EHEA 65% of all second cycle programmes follow the 120 ECTS model. The 60-75 ECTS model is used for 16% of programmes, while 13% of all second cycle programmes follow the 90 ECTS model. 6% of programmes have another duration. In the United Kingdom (England, Wales and Northern Ireland), although data is not available centrally, the most typical workload is 90 ECTS for taught Master degrees and 180 ECTS for taught Master of Philosophy (MPhil) qualifications.

Figure 2.5: Share of second-cycle (master) programmes with a workload of 60-75, 90, 120 or another number of ECTS credits, 2013/14*



Notes:

UK (1) = UK-ENG/WLS/NIR

Azerbaijan, Germany, Greece, Malta and United Kingdom (England, Wales and Northern Ireland) could not provide statistical data on the breakdown of first cycle programmes by workload

Ukraine: no data submitted.

Source: BFUG questionnaire.

The 60-75 ECTS model is present in 26 countries and dominates in Montenegro, Serbia and Spain (a reduction from being a dominant model in eight systems in 2012). The 90 ECTS model is less widespread: it is only present in 22 systems, and dominates also in three countries– Cyprus, Ireland, and the United Kingdom (Scotland) (a reduction from six in 2012). In 19 higher education systems, there are also programmes with a workload other than 60-75, 90 or 120 ECTS credits. Whereas in the first cycle, professional programmes are typically longer than academic ones, in the second cycle, the tendency is the opposite: professional programmes are often shorter.

The share of second cycle programmes with a duration outside the 60-120 ECTS interval is in most cases between 1% and 5%, but reaches 10% in Russia and 13.5% in Norway.

Combined length of first and second cycle programmes

When examining first and second cycle studies together, the total student workload may vary considerably. While the most widespread combination is 180 ECTS (first cycle) plus 120 ECTS (second cycle), at least twelve combinations are commonly found between 240 ECTS (“3+1”) to 360 ECTS (“4+2”). These combinations are outlined in Figure 2.6.

Figure 2.6: Possible combinations of student workload of the first and second cycle

Number of ECTS credits in the first cycle	Number of ECTS credits in the second cycle	Total number of ECTS	Number of ECTS credits in the first cycle	Number of ECTS credits in the second cycle	Total number of ECTS
180	60	240	210	90	300
180	75	255	210	120	330
180	90	270	240	60	300
180	120	300	240	75	315
210	60	270	240	90	330
210	75	285	240	120	360

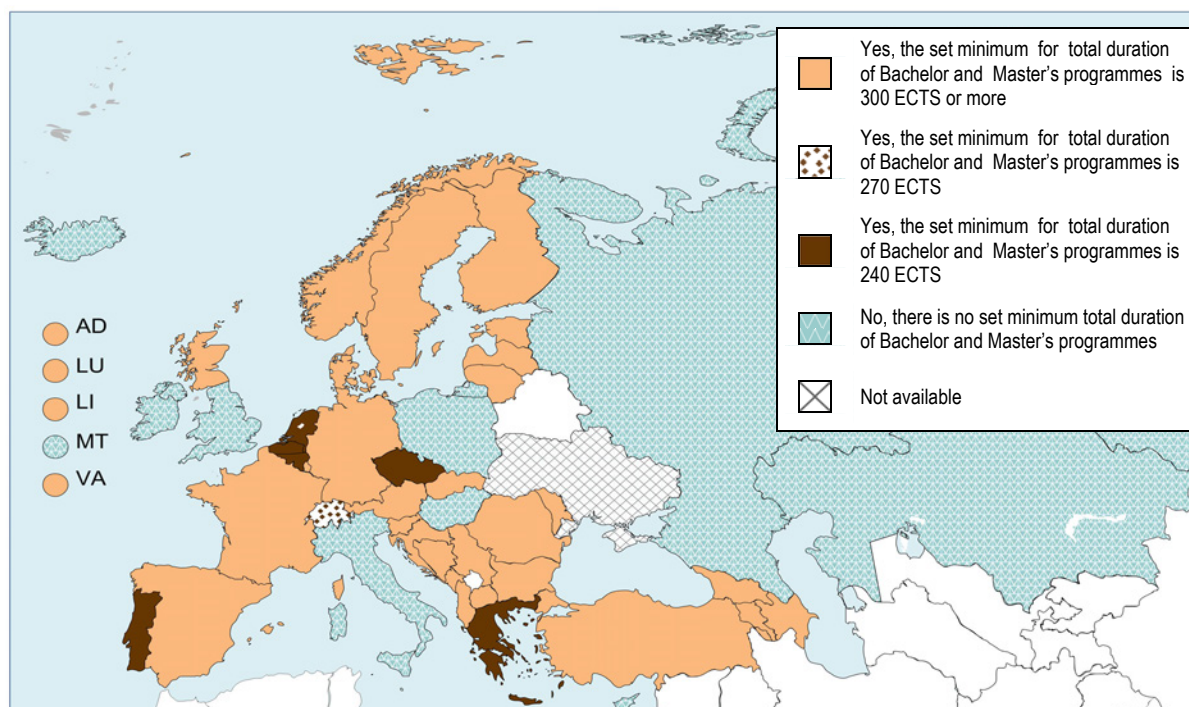
Source: BFUG questionnaire.

The difference between the extremes is 120 ECTS or two nominal years of study. However, the recognition of foreign qualifications whose study workload is substantially smaller than that of the country where recognition is sought can lead credential evaluators to question whether the learning outcomes of such a qualification can be similar to those of the host country (Recommendation on Criteria and Procedures for the Assessment of Foreign Qualifications of the qualification in another country) ⁽⁵⁾. For this reason, larger differences in the total workload of first and second cycle degrees may cause recognition problems.

Therefore, the 2014 BFUG questionnaire asked countries if they have set a minimum total workload of first and second cycle studies. As shown in Figure 2.7, 36 out of 47 higher education systems regulate the minimum total workload of the two cycles. Out of the 37 countries that have set the minimum, 31 countries mention 300 ECTS. Some countries underline that a total of 300 ECTS allows several bachelor and master combinations to coexist (mainly “3+2”; “4+1”). Georgia and Azerbaijan have set an even higher minimum total workload (360 ECTS and 330 ECTS correspondingly). Switzerland has set the minimum of 270 ECTS. Finally, Belgium, Czech Republic, Greece, the Netherlands and Portugal require at least 240 ECTS credits (“3+1”), although in Belgium (French community) the most typical combined minimum duration is 300 ECTS credits. Moldova regulates the maximum workload of the first and second cycle combined at 330 ECTS credits.

⁽⁵⁾ Revised Recommendation on Criteria and Procedures for the Assessment of Foreign Qualifications (adopted by the Lisbon Recognition Convention Committee Austria its fifth meeting, Sèvres, 23 June 2010), paragraph 40 and paragraph 40 of the Explanatory Memorandum, available at: http://www.coe.int/t/dg4/highereducation/recognition/criteria%20and%20procedures_EN.asp#P309_37160

Figure 2.7: Nationally set minimum total duration of the Bachelor & Master programmes, 2013/14



Notes:

It is also possible that country do not set minimum workload for the combination of workload of first and second cycles, but do set minimum workload of each cycle, e.g. Belgium (Flemish Community).

Source: BFUG questionnaire

2.1.3. Programmes outside the typical Bologna models

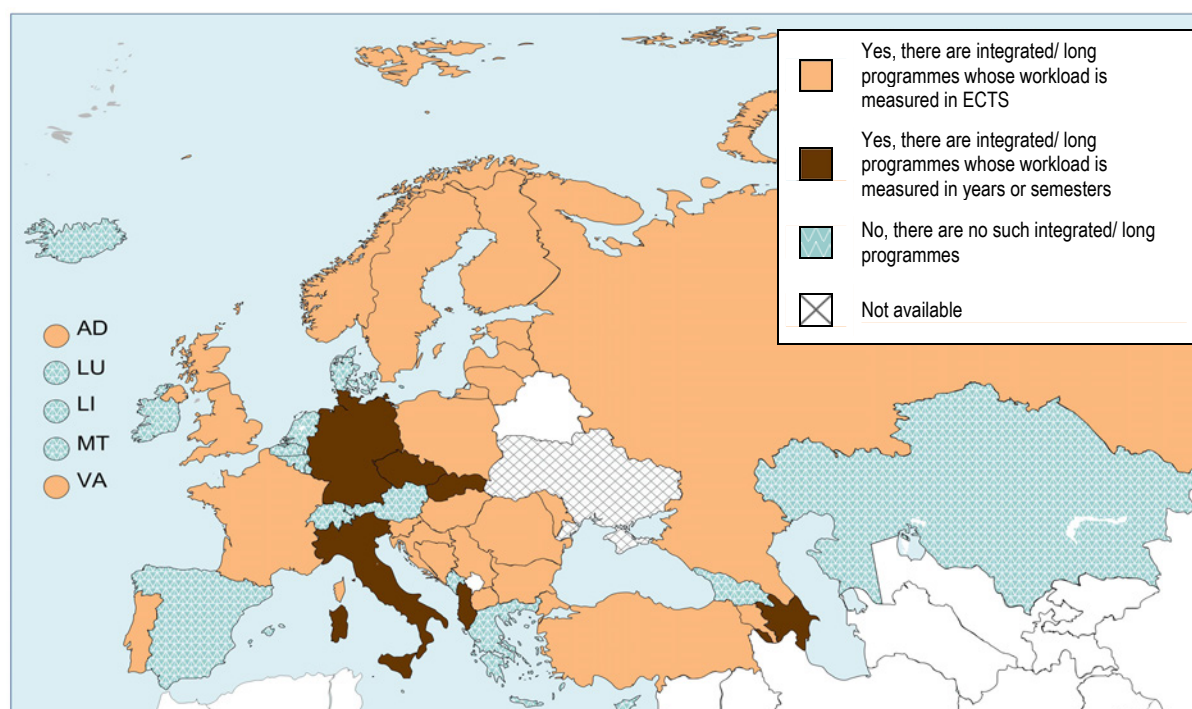
The majority (31) of higher education systems confirm the existence of degree programmes outside the two-cycle (Bachelor-Master) model.

Integrated first and second cycle programmes

The most typical variant from the Bologna two cycle model are integrated programmes including both the first and second cycle and leading to a second cycle qualification. This kind of programme in most cases leads to qualifications in regulated professions, i.e. in the fields of medicine, dentistry, veterinary medicine, nursing and midwifery, architecture, but in some countries also in engineering, law, theology, teacher training and some others. The total number of countries which maintain such integrated/long programmes is 31, and this figure has not changed since 2012.

In previous years a substantial number of countries continued to measure the workload in these programmes in years or semesters. However, Figure 2.8 shows that in 2014 only five countries Albania, Azerbaijan, Czech Republic, Germany and Slovakia still measure workload in years/semesters.

Figure 2.8: Presence of integrated/long programmes leading to a second-cycle degree 2013/14



Source: BFUG questionnaire

The duration of integrated programmes leading to regulated professions is usually chosen according to the requirements of national legislation and in the EU/EEA countries according to the EU directive 2015/36/EC amended by 2014/55/EU. In general, this duration is 300-360 ECTS (five-six years) depending on the regulated profession in question.

The share of such programmes in the total number of programmes varies widely: from 2.3% in Finland to 28% in Sweden and Switzerland. In the United Kingdom, integrated programmes are shorter than in other countries – 240 ECTS/4years of which 60 ECTS credits are obtained at the second cycle level. The main subject areas where these programmes are found are Science, Technology, Engineering and Maths (STEM) subjects and professions allied to medicine.

Second cycle programmes with a duration outside the Bologna 60-75, 90 and 120 ECTS pattern

Deviations to the typical second cycle Bologna duration (outside 60-120 ECTS credits) can be observed in 27 higher education systems. They occur mainly in programmes leading to regulated professions that have been rearranged into two Bologna cycles, but where the regulations of the profession in question require a total study duration beyond 300 ECTS/5 years. For this reason second cycle programmes can comprise up to 180 ECTS in Belgium, Cyprus, Finland, Holy See, Norway and Switzerland, and even more (187.5 ECTS) in the United Kingdom (Scotland). In the Czech Republic, Finland and Hungary, programmes requiring up to 150 ECTS credits may be found in subjects such as medicine, dentistry, pharmacy, veterinary medicine, architecture, law or theology.

In the United Kingdom, there are several second cycle qualifications outside the Bologna model, including the taught MPhil (up to 180 ECTS), postgraduate diplomas (60 ECTS), and postgraduate certificates (30 ECTS). Some other countries have introduced a greater duration in the second cycle (180 ECTS) to accommodate additional study needs of students having a bachelor degree in a different field (Slovakia) or to facilitate programmes with specific language requirements (Holy See).

'Pre-Bologna' programmes

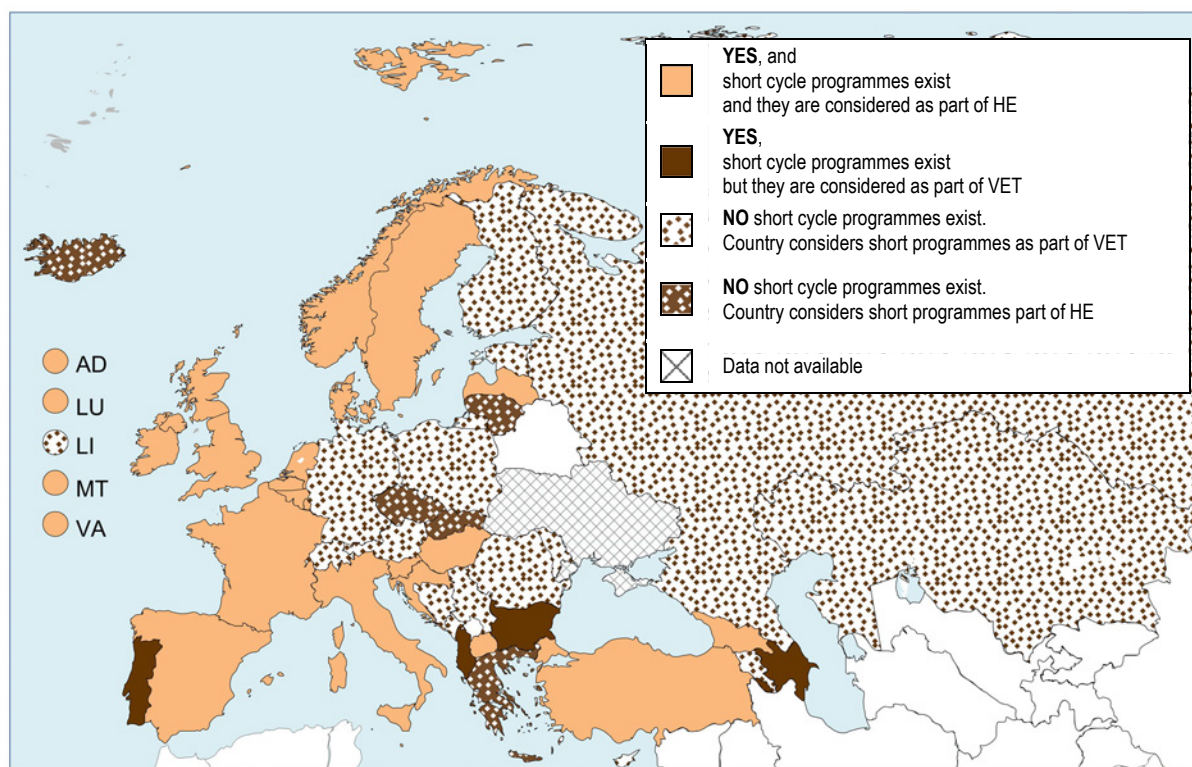
In a few countries (Andorra, Slovenia and Spain) longer 'pre-Bologna' programmes continue to exist for a transition period. However, these programmes will cease to exist when the first cohort of the students studying in the Bologna model graduate.

2.1.4. Short-cycle higher education programmes

Short cycle programmes have been the subject of discussion since the beginning of the Bologna Process. While a group of countries had neither short cycle programmes nor any plans to introduce them, other countries with such programmes were looking to integrate them in the Bologna three cycle system. The compromise wording accepted in the Bologna Process Ministerial Conference in 2005 in Bergen formulated the concept of "short cycle within the first cycle". However this has not solved all the issues. Hence several ministerial communiqués have since addressed short cycle study programmes with a view to improving their transparency and comparability.

The 2014 BFUG survey attempted to clarify several issues related to short cycle studies. The number of educational systems having short cycle programmes has grown from 14 in 2005 to 26 in 2014. As illustrated in Figure 2.9, short cycle programmes are most commonly considered to belong to higher education but in some countries they are attributed to post-secondary Vocational Education and Training (VET). The countries that do not have short cycle provision can also be divided in terms of their attitude to such programmes.

Figure 2.9: Do short cycle programmes belong to higher education? 2014



Source: BFUG questionnaire.

2.1.5. Access to the next cycle

Access between the Bologna cycles has been among the most important issues since the beginning of the Bologna process. The Bologna texts state that first-cycle degrees should give access to studies in the second cycle, while the second-cycle degrees should give access to doctoral studies" ⁽⁷⁾. Access is defined in the sense of the Lisbon Recognition Convention as having the right to be considered for admission.

However, even if access is provided in the understanding of the Lisbon Recognition Convention, there are several reasons why not all first-cycle programmes give direct access to the second-cycle. This is often related to a binary differentiation between "academic" and "professional" programmes. This leads to a requirement that holders of professional first-cycle degrees must follow bridging programmes in order to be able to access "academic" second cycle programmes. Indeed in several countries, there may be no second-cycle programmes that provide direct continuation from some or all professional first-cycle programmes.

Similar reasons may hinder holders of "professional" second cycle qualifications entering doctoral studies. Consequently, ministers in several of Bologna ministerial communiqués have encouraged efforts to remove barriers to access and progression between cycles ⁽⁸⁾⁽⁹⁾.

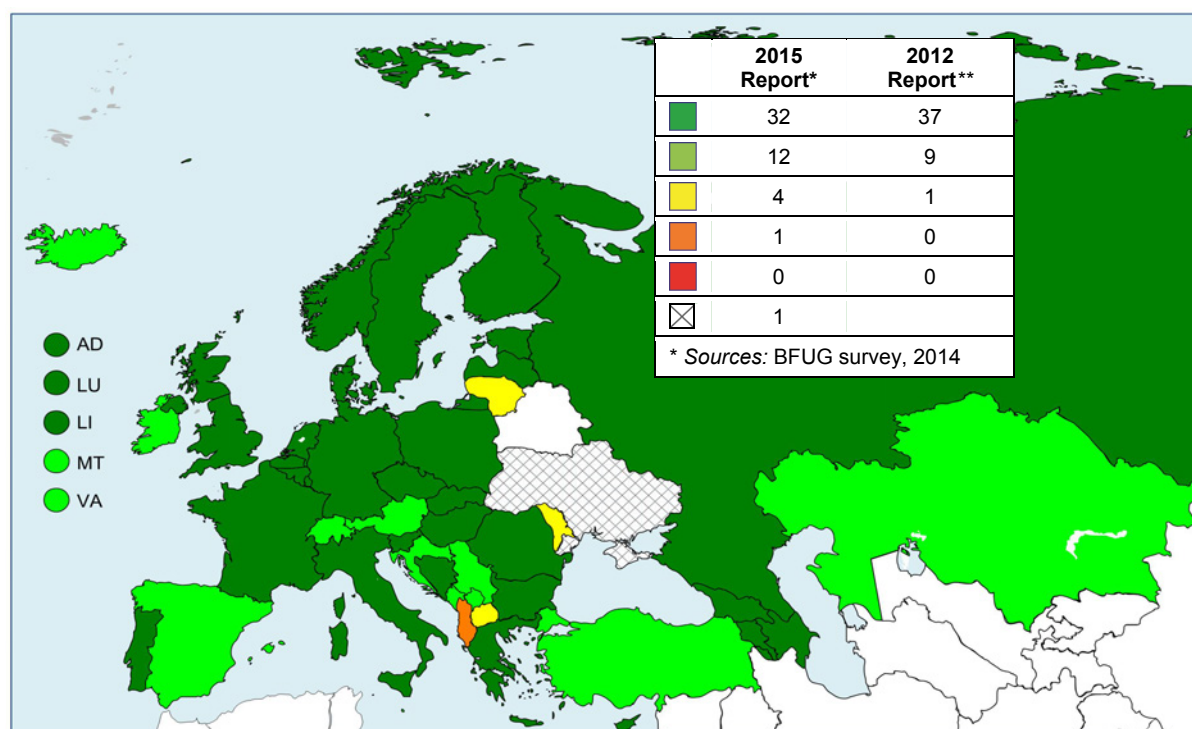
As Figure 2.11 shows, in 32 countries, all first-cycle programmes now give access to the second cycle. However, despite the dominance of dark and light green in the map, a few countries - Lithuania, The former Yugoslav Republic of Macedonia, and Moldova - have some programmes that do not give access to the next cycle, and in Albania has a significant number.

⁽⁷⁾ Realising the European Higher Education Area. Communiqué of the Conference of Ministers responsible for Higher Education, Berlin, 19 September 2003.

⁽⁸⁾ The European Higher Education Area – Achieving the Goals. Communiqué of the Conference of European Ministers Responsible for Higher Education, Bergen, 19-20 May 2005.

⁽⁹⁾ London Communiqué: Towards the European Higher Education Area: responding to challenges in a globalised world, 18 May 2007.

Figure 2.11: Scorecard indicator n°2: Access to the next cycle, 2013/14



Notes:

Access to the next cycle is defined as the right of qualified candidates to apply and to be considered for admission (definition used in the Lisbon Recognition Convention). The indicator measures the percentage of first-cycle programmes that give access to at least one second-cycle programme. Scoring criteria are given in the table above.

United Kingdom: data from Northern Ireland only; for England and Wales data are not centrally available.

Scorecard categories

- All first-cycle qualifications give access to second-cycle programmes and all second-cycle qualifications give access to at least one third-cycle programme without major transitional problems (10)
- There are some (less than 25%) first-cycle qualifications that do not give access to the second cycle, or some second cycle-qualifications that do not give access the third cycle
- There are some (less than 25 %) first-cycle qualifications that do not give access to the second cycle and some second-cycle qualifications that do not give access to the third cycle
- A significant number (25-50 %) of first and/or second-cycle qualifications do not give access to the next cycle
- Most (more than 50 %) first and/or second-cycle qualifications do not give access to the next cycle **OR** there are no arrangements for access to the next cycle

At first sight, it seems that the performance of countries in improving access to the next cycle has decreased over time. However, the country explanations and additional data demonstrate that actually the changes in scores are rather caused because of better data collection and more detailed self-analysis of the countries concerned. According to country explanations, instead of broad estimates claiming 100% access (actually, just meaning that the country takes no additional measures to hinder access), in the current data collection countries paid attention not only to the most common case where graduates choose a next cycle programme in the same field. In the 2014 data collection, countries also considered cases where students choose studies in a different field, where students choose to switch between academic and professional programmes (which exists in 23 EHEA countries), or where students choose a different higher education institution).

Several countries do not grant direct access to second cycle studies to holders of professional first cycle qualifications. For instance, in Belgium (Flemish Community), Lithuania and the Netherlands

(10) Compensatory measures required for students coming from another study field will not be counted as "major transitional problems".

graduates from professional programmes must complete bridging programmes. Malta makes use of a 30 ECTS bridging course if the field of study is different, but in Switzerland additional courses usually have to be taken if the applicant comes from a different higher education institution. In Ireland access is granted for holders of honours degrees rather than the ordinary bachelor (see also next section, particularly Figure 2.12).

Regulation of progression between first and second cycle

Despite the general tendency towards easier access to the next cycle, when it comes to practical measures, access to the next cycle may require sitting additional examinations, taking additional courses or having a mandatory work experience, (see Figure 2.12).

Only a few countries use additional requirements for all students. In seven countries - Azerbaijan, Bosnia-Herzegovina, Georgia, Kazakhstan, Moldova, Russia and Turkey - all students have to sit entrance exams, and some students will have to sit examinations in another 23 countries. Several countries explained that they chose the answer “some students” due to additional requirements in the cases of highly specific fields such as the creative arts or sports, and therefore the requirements affect a small share of all students. The same is true in the cases where additional courses are required. No country has a general requirement for prior work experience, but in 16 countries some students need to have prior work experience. In Finland, for holders of a polytechnic first cycle degree, when applying for further studies, work experience between the two cycles is compulsory.

There are two main groups of applicants who have to fulfil additional requirements: those holding a professional first cycle degree applying for admission to an academic second cycle programmes, and those who hold a first cycle qualification in a different study field. In addition, in some countries this may affect applicants who have a degree in the same field but come from a different higher education institution. Figure 2.12 illustrates the different country realities.

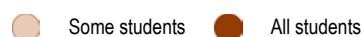
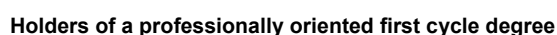
All applicants holding professional first cycle qualifications have to sit examinations in the seven countries mentioned above, and in 19 countries may have to do so in some cases. Some of these countries mention that the additional courses are applied on a case by case basis.

For **applicants holding a first cycle qualification in a different field**, additional examinations are only applied in the above group of countries where the examinations are a general requirement (Azerbaijan, Bosnia-Herzegovina, Georgia, Kazakhstan, Moldova, Russia, Turkey), but 21 countries apply additional examinations in some cases.

In Moldova, Montenegro and Switzerland all applicants coming from a different study field have to take additional courses, but in 17 countries the additional courses are applied in some cases. In Bulgaria there is no formal requirement for those coming from a different field to take additional courses, although the second cycle programme is prolonged.

In the case of **applicants with a qualification in the same field but coming from a different institution**, besides the countries in which all students have to sit additional examinations, in 25 countries some students who have a first cycle degree same field from a different institution have to sit additional examinations. No country applies additional courses to all such applicants, but in 29 countries additional courses can be applied to some students.

All holders of a first-cycle degree

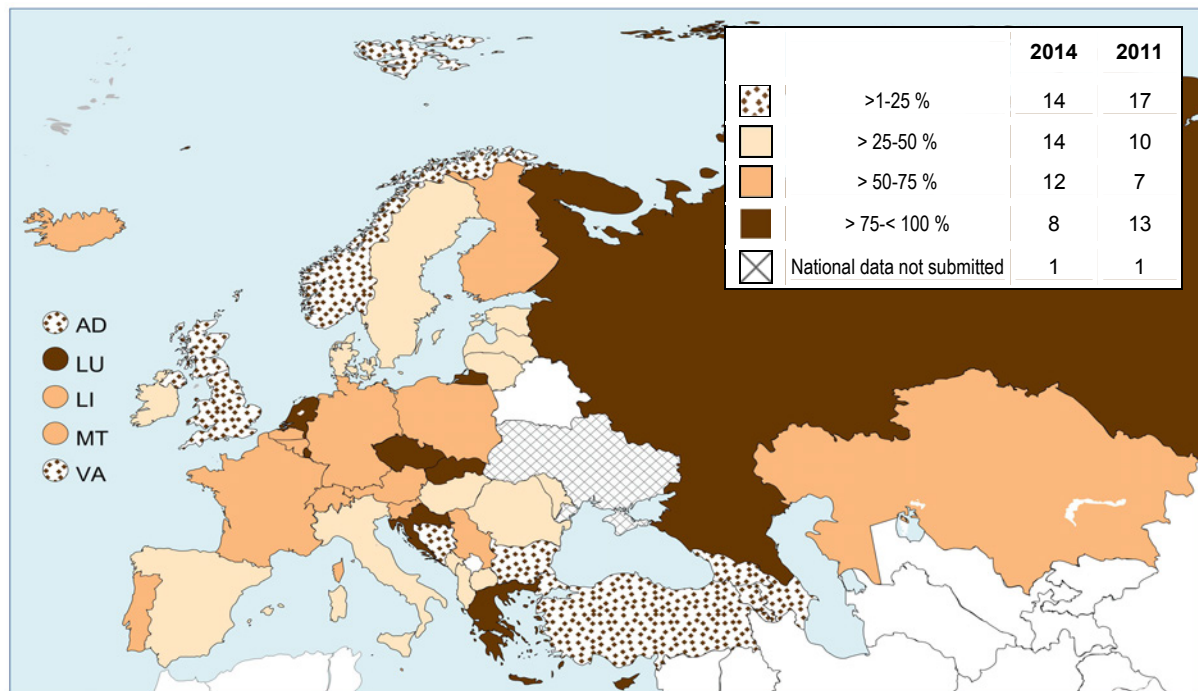


In principle, nearly all first cycle graduates are eligible at least to have access to a second cycle programme in the same field. However, this does not mean that nearly all first cycle graduates *should* undertake further studies in a second cycle programme – nor that they should remain in the same field. Figure 2.13 shows the share of first-cycle graduates who actually continue studies in a second-cycle programme.

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The number of higher education systems where the share of graduates who continue to the second cycle is in the range of 1-25% also decreased: it is now 14 compared to 17 systems in 2011. One explanation of the small share of students continuing to the second cycle in these countries is that graduates of 240 ECTS programmes – which include work placements and/or professional training more often than in the programmes of smaller workload – are more employable and therefore move to the labour market rather than continue studies. Alternatively, another explanation is the high selectivity of admission procedures to the second cycle.

Figure 2.13: Share of first-cycle students continuing studies in a second-cycle programme after graduation from the first cycle (within one year), 2013/14

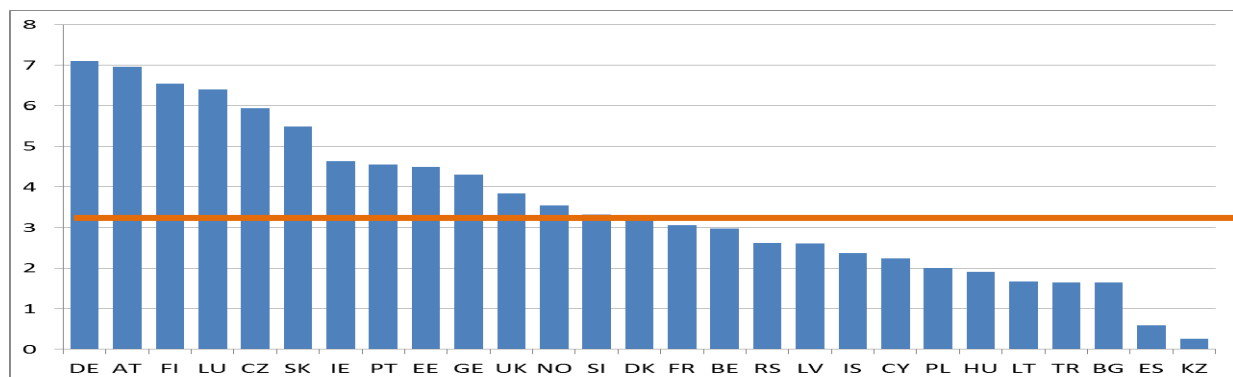


Source: BFUG questionnaire.

2.1.6. Third-cycle programmes

The share of third cycle students in the total student community varies strongly across the EHEA. The newest Eurostat data of 2012 covers 27 countries within and outside the European Union (Figure 2.14).

Figure 2.14: Share of doctoral students in the total number of students in Bologna pattern, 2012



Notes:

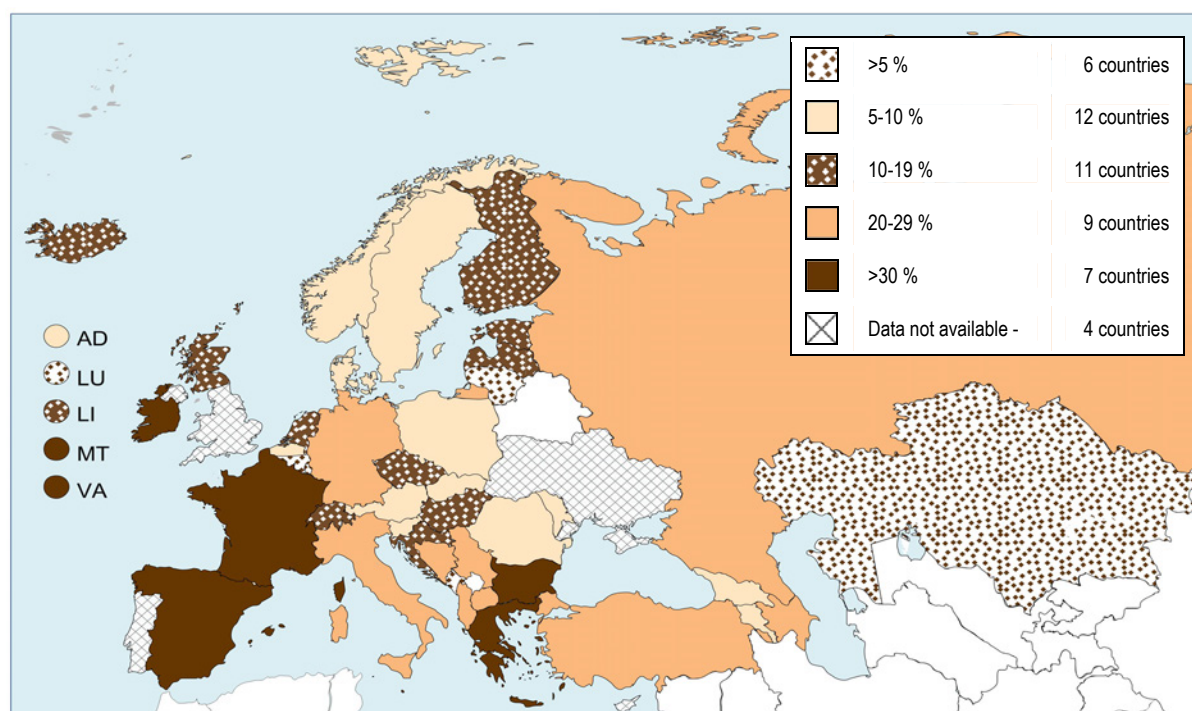
Data does not include doctoral students outside the Bologna pattern

Source: Eurostat

The highest percentages of third cycle students are in Germany and Austria – 7% followed by Finland and Luxembourg with just over 6 %. The smallest shares of doctoral students in the total student population are found in Kazakhstan (0,25%), and in Spain (0,60%). In the case of Spain the reason for such a small percentage may be that doctoral students are not yet studying in Bologna type programmes.

While Eurostat data shows the share of doctoral students among all students, the BFUG survey asked countries to estimate the percentage of second cycle graduates entering into a third cycle programme (Figure 2.15).

Figure 2.15: Percentage of second cycle graduates eventually entering a third cycle programme, 2013/14



Notes:

In the case of Estonia, the percentage is given within two (rather than one) years.

The greatest movement of second cycle graduates to third cycle studies is to be found in Bulgaria, Greece, Holy See, France, Ireland, Malta, and Spain. Although no estimation was provided by the United Kingdom (England, Wales and Northern Ireland) nearly half of the country's doctoral students had their previous education outside the UK.

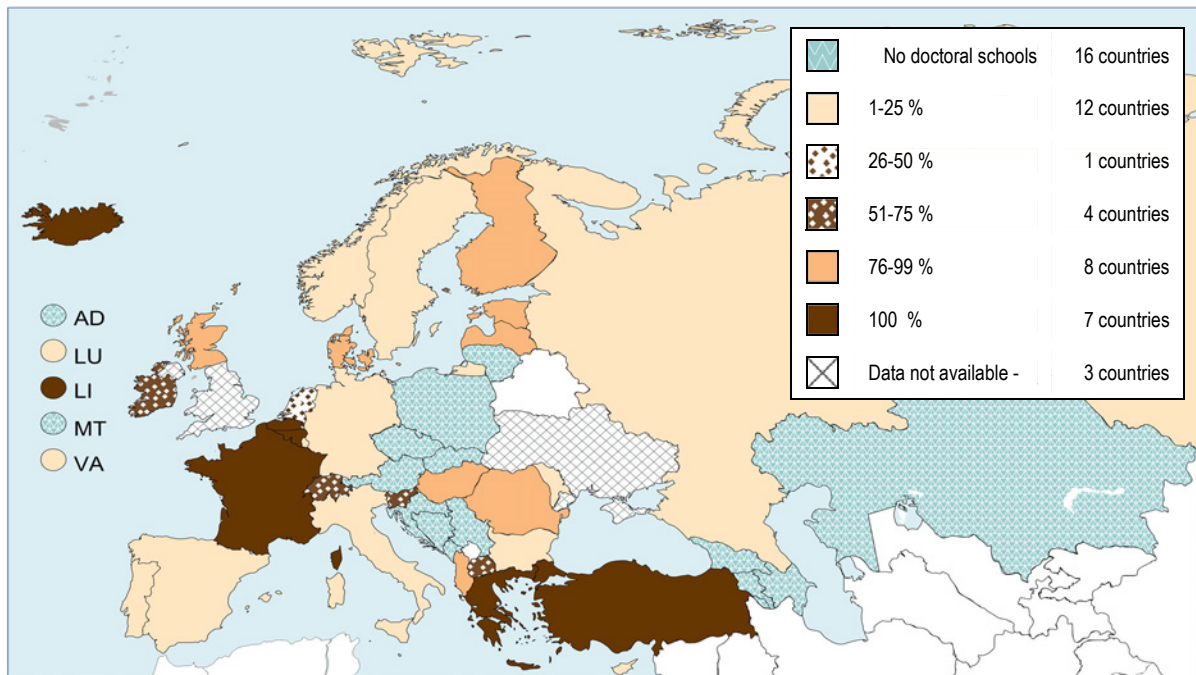
In 19 countries access to studies in the third cycle without a second cycle qualification is also possible. In the vast majority of those countries such access to the third cycle without a second cycle qualification is exceptional and only high performing students are accepted. In Belgium (Flemish Community) this opportunity is mainly given to foreign students. In Holy See, Montenegro, Romania, Spain this path is available to students who have studied in the 300 ECTS programmes and therefore only formally belong to the category of first cycle graduates.

The share of third cycle students entering doctoral studies without a second cycle qualification is 1-5% in Belgium, Germany, Montenegro, Spain, Sweden, Turkey and the United Kingdom (Scotland). In Cyprus, Denmark and the Holy See the share is 6-15%, but in Ireland and Portugal this number reaches 16-25%. Austria, Finland, Greece, Malta, Romania and United Kingdom (England, Wales and Northern Ireland) cannot specify this share.

In 2014, 32 systems state that they have doctoral schools – an increase from 30 in 2012. There are 16 systems which do not have doctoral schools (see Figure 2.16). In 12 of the countries where doctoral

schools exist, 1-25% of doctoral students study within such structures. There are 19 systems where the majority of students study in doctoral schools, including seven where all students study in such a framework.

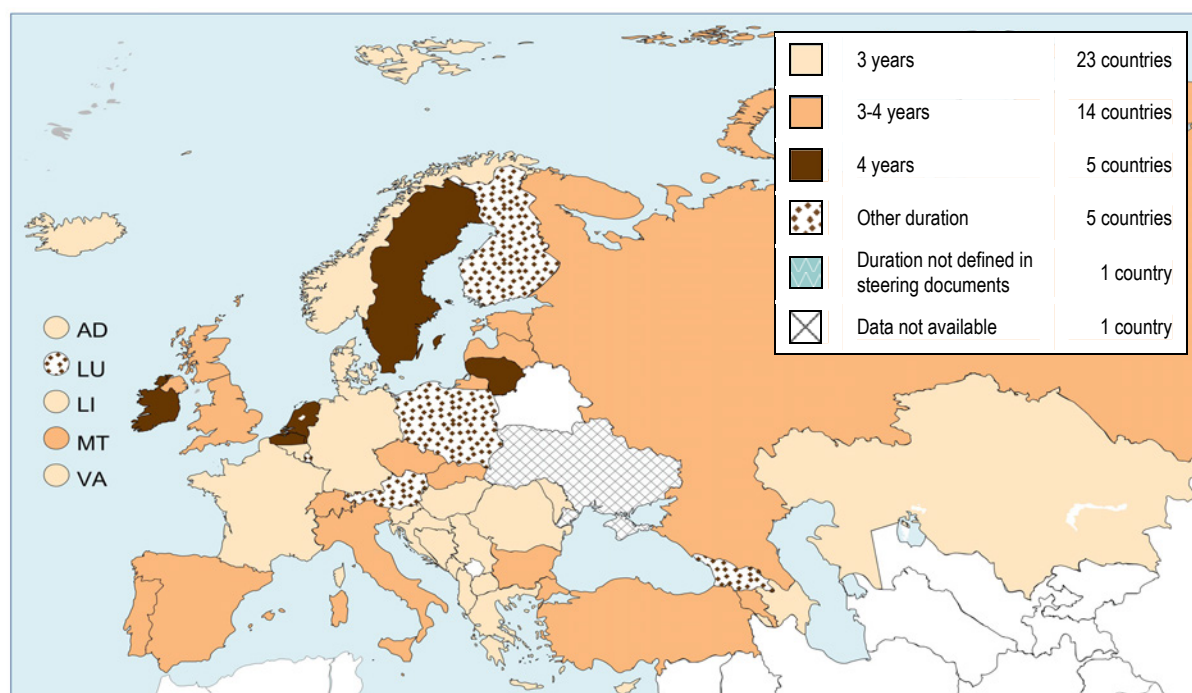
Figure 2.16: Percentage of doctoral students in doctoral schools, 2013/2014



Although the United Kingdom (England, Wales and Northern Ireland) could not give quantitative estimates on doctoral schools, the doctoral system is highly developed, with a range of innovative options. Traditional supervision- based doctorates and specialist training co-exist in doctoral training centres. These structures differ from traditional supervision in that they provide training for students within focused research areas, often defined strategically by the Research Council funder(s) from the outset. Centres can be focused on academic or industrially relevant research topics, or a mix of both. In addition there are other less commonly adopted routes such as professional doctorates.

As shown in Figure 2.17, the most typically prescribed duration of full-time doctoral programmes is three years – 23 countries in 2014 (24 countries in 2012). The second most popular duration for doctoral studies is 3-4 years. In 4 countries, the duration for doctoral studies is 4 years, while in five countries, the duration of doctoral studies reaches beyond this time.

Figure 2.17: The length of full-time third-cycle programmes defined in the national steering documents, 2013/14



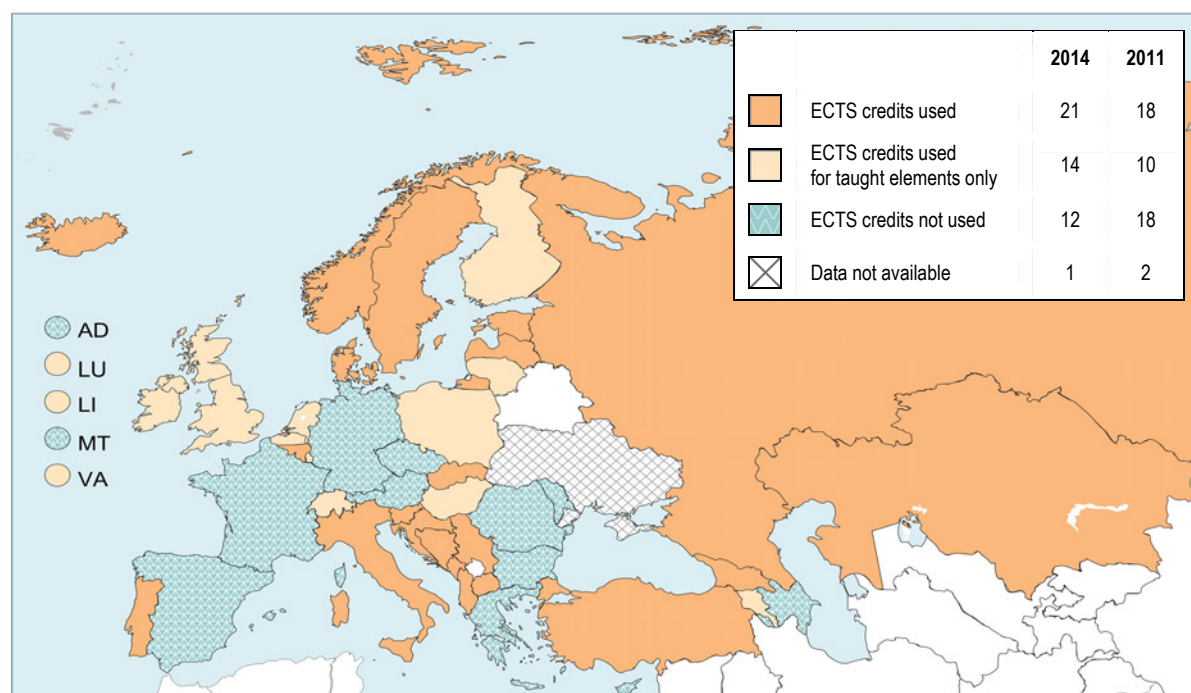
The BFUG survey demonstrates that, while the proportion of structured doctoral programmes is growing, the traditional supervised doctoral studies are still the most widespread. In 16 countries all doctoral training follows such a traditional model and in another 9 countries over 70% of programmes follow the traditional approach.

Professional doctoral programmes are not yet widespread. Only Belgium (Flemish Community), Denmark, Ireland and United Kingdom have 2-5% professional doctoral programmes, while Portugal has 3% industrial doctoral programmes. According to the ad-hoc working group on the third cycle, the duration of such professional programmes is usually prescribed at three years, although it is not regulated in all countries. In Kazakhstan all doctoral programmes resemble professional doctoral programmes.

All countries which have developed a qualifications framework include doctoral qualifications. In eight systems – Albania, Armenia, France, Italy, Moldova, Norway, Slovenia and United Kingdom (Scotland) other third cycle qualifications are also included in the qualifications framework.

The use of ECTS in doctoral studies is also growing over time. In 2014, 21 systems use ECTS throughout doctoral studies, and an additional 14 countries for taught elements only. 12 countries do not use ECTS in third cycle programmes, although among these, the Czech Republic mentions that ECTS credits are used in some higher education institutions (Figure 2.18). In comparison, the 2012 Implementation Report showed that 18 systems used ECTS fully, 10 for taught elements only, while 18 systems did not use ECTS in doctoral programmes at all.

Figure 2.18: Use of ECTS credits in doctoral programmes, 2013/14



Notes:

In Czech Republic ECTS credits used in some doctoral programmes

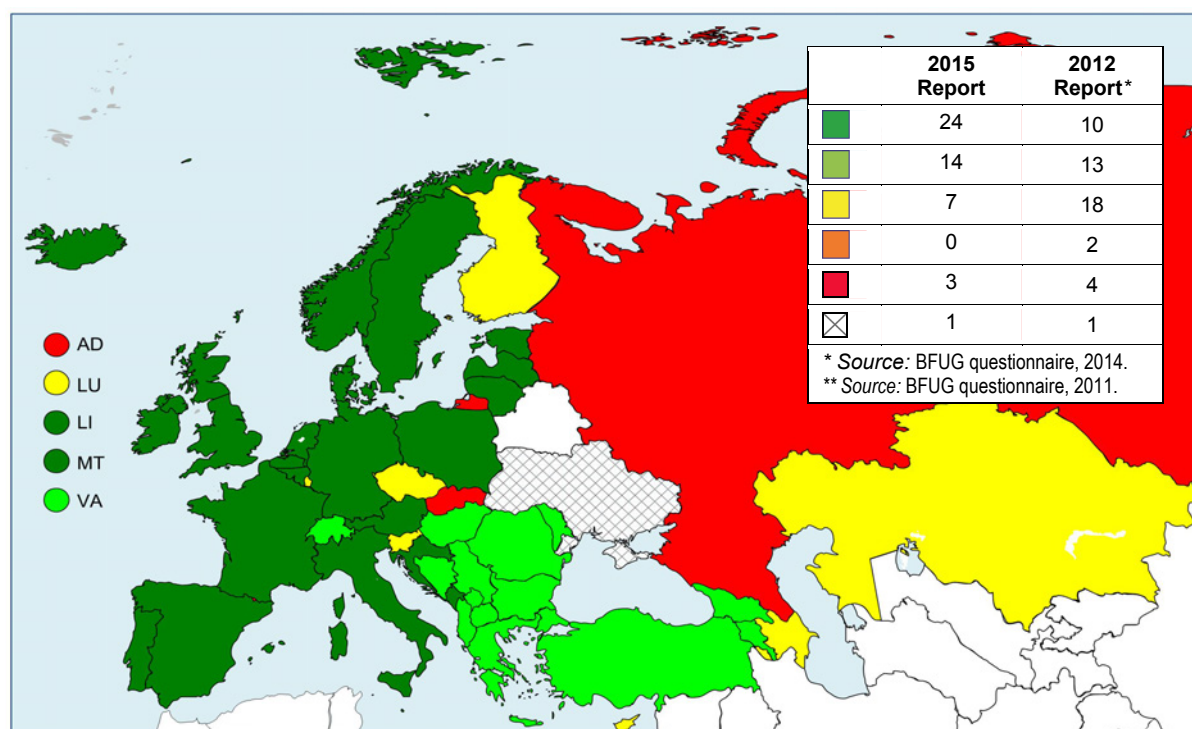
2.2. Bologna tools

2.2.1. National qualifications frameworks (NQF)

22 countries have completed all the 10 implementation steps of qualifications frameworks ⁽¹¹⁾ This represents a significant increase to the 10 countries in this situation in 2012. Moreover 14 more countries are close to completion (Figure 2.19). Moreover, and perhaps even more significantly, the number of countries still in the first three steps of implementation has reduced: there are three such countries compared to nine countries in 2012.

⁽¹¹⁾ Here and further referring to the data provided concern the HE-QF

Figure 2.19: Scorecard indicator n°3: Implementation of national qualifications frameworks, 2013/14*



Notes:

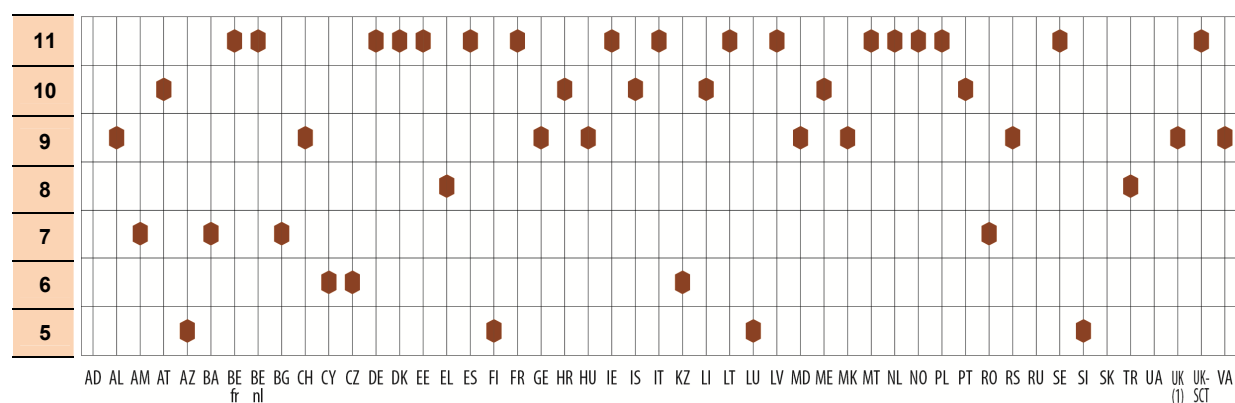
The indicator is defined as the current state in implementation of the national qualifications framework. The state of implementation was measured against the ten steps of implementation of NQF defined by the EHEA qualifications frameworks working group. To keep the same scoring criteria as in 2009 the 10 steps of NQF implementation are transformed into stocktaking scores as shown.

Scorecard categories:

- Step 10: The Framework has self-certified its compatibility with the Qualifications Framework for the European for Higher Education Area
- Steps 7-9:
 - 9. Qualifications have been included in the NQF
 - 8. Study programmes have been re-designed on the basis of the learning outcomes included in the NQF
 - 7. Implementation of the NQF has started with agreement on the roles and responsibilities of higher education institutions, quality assurance agency(ies) and other bodies
- Steps 5-6:
 - 6. The NQF has been adopted in legislation or in other high level policy fora
 - 5. Consultation / national discussion has taken place and the design of the NQF has been agreed by stakeholders
- Step 4: The level structure, level descriptors (learning outcomes), and credit ranges have been agreed
- Step 3-1:
 - 3. The process of developing the NQF has been set up, with stakeholders identified and committee(s) established
 - 2. The purpose(s) of the NQF have been agreed and outlined
 - 1. Decision to start developing the NQF has been taken by the national body responsible for higher education and/or the minister

Figure 2.20 shows the breakdown of countries by each step of implementation. At least 16 countries have made substantial progress in the implementation of NQFs since the 2012 Implementation report. However, 12 countries still have not started implementation at programme and institution level, and some of them show no progress since 2012.

Figure 2.20: Progress in development of national qualifications frameworks according to the 11 steps, 2014



1 AD, SK **2** – **3** RU **4** – Data not available: **UA**

1. Decision to start has been taken by the national body responsible for higher education	2 countries
2. The purpose(s) of the NQF have been agreed and outlined	no countries
3. The process of developing the NQF has been set up, with stakeholders identified and committee(s) established	1 countries
4. The level structure, level descriptors (learning outcomes), and credit ranges have been agreed	no countries
5. Consultation / national discussion has taken place and the design of the NQF has been agreed by stakeholders	4 countries
6. The NQF has been adopted in legislation or in other high level policy for a	3 countries
7. Implementation of the NQF has started with agreement on the roles and responsibilities of higher education institutions, QA agency(ies) and other bodies	4 countries
8. Study programmes have been re-designed on the basis of the learning outcomes included in the NQF	2 countries
9. Qualifications have been included in the NQF	9 countries
10. The Framework has self-certified its compatibility with the European Framework for Higher Education	7 countries
11. The final NQF and the self-certification report can be consulted on a public website	17 countries

Source: BFUG questionnaire.

Notes:

No countries at Step 2 and step 4

Belgium, Denmark, Estonia, France, Germany, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Norway, Poland, Spain, Sweden and United Kingdom (Scotland) have fulfilled all the steps in implementation of qualifications frameworks and have the self-certification report that can be consulted on a public website. Austria, Croatia, Iceland, Lithuania and Portugal miss only the step of providing information on qualifications frameworks on a public website.

The next group of ten countries have included qualifications in the NQF but have not yet self-certified its compatibility with the European Framework for Higher Education. Georgia and Turkey are in the phase where qualifications have been included in the NQF. In Armenia, Bosnia-Herzegovina, Bulgaria, Lithuania, Montenegro and Romania the implementation of the NQF has started but study programmes have not yet been completely re-designed on the basis of the learning outcomes included in the NQF. Legislation has been adopted but practical implementation has not yet started in the Czech Republic and Kazakhstan. In Azerbaijan, Cyprus, Finland, Luxembourg and Slovenia the national agreement on the design of NQF has been reached. In Russia the process of developing the NQF has been set up with stakeholders. Finally, in Andorra and Slovakia only the decision to start work on the NQF has been taken.

Seven countries still do not have legislation for the NQF, and another four countries have legislation but have not started practical implementation.

These findings echo those of the Structural Reforms Working Group ⁽¹²⁾, where, in 2014, the Network of National Correspondents for Qualifications Frameworks conducted a small survey on the development of NQFs for higher education. In that context 10 out of 25 countries stated that they do not yet have a national framework. This means that the commitment made by Ministers to develop national frameworks and prepare them for self-certification by 2012 remains unfulfilled for many countries.

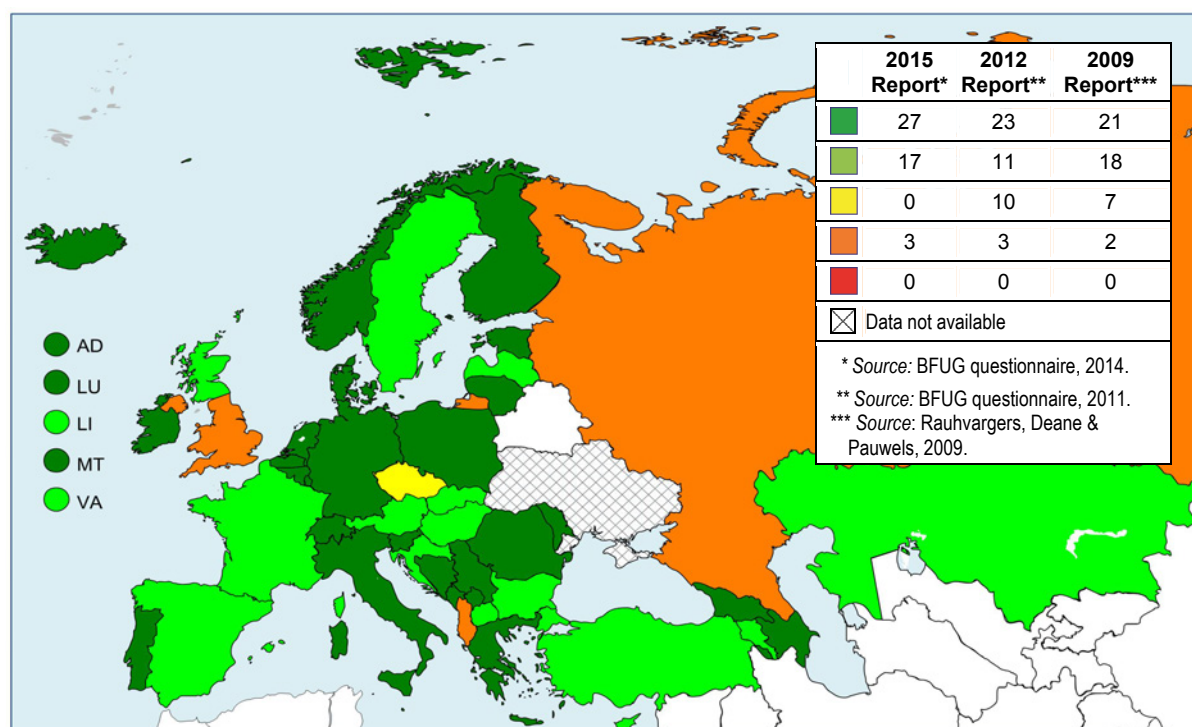
It should be underlined that developing national higher education frameworks requires a development process within each system and that this development takes time. This is particularly relevant for countries that, despite reporting not having an NQF in place, also expected to develop and self-certify their national framework by 2016.

The extent to which national higher education frameworks are open to non-higher education qualifications in a lifelong learning perspective (levels 6, 7 and 8 of the EQF) varies considerably. For half of the responding countries, these levels are only relevant for higher education qualifications. For the other half, they are open to VET qualifications either directly within the higher education framework or via a double entry system. The majority of countries still face challenges in including non-formal qualifications within national higher education frameworks self-certified against the QF-EHEA ⁽¹³⁾.

2.2.2. ECTS, learning outcomes and student centred learning

As Figure 2.21 shows, 44 countries are in the dark or light green categories compared to 34 in 2012 and the four remaining countries are in the orange zone regarding the implementation of the ECTS system. In Albania, Russia and the United Kingdom (England, Wales and Northern Ireland) are the only systems in which ECTS credits are allocated in less than 75% programmes.

Figure 2.21: Scorecard indicator n°8: Stage of implementation of ECTS system, 2013/14*



⁽¹²⁾ Final Report of the Structural Reforms Working Group, 2014, p.68

⁽¹³⁾ Ibid.

Scorecard categories

- ECTS credits are allocated to all components of all HE programmes, enabling credit transfer and accumulation
ECTS credits are demonstrably linked with learning outcomes
- ECTS credits are allocated to all components of more than 75 % of HE programmes, enabling credit transfer and accumulation AND ECTS credits are demonstrably linked with learning outcomes
OR
Credits are allocated to all components of all HE programmes using a fully ECTS compatible credit system enabling credit transfer and accumulation AND credits are demonstrably linked with learning outcomes
- ECTS credits are allocated in 50-75 % of all HE programmes AND ECTS credits are demonstrably linked with learning outcomes **OR**
ECTS credits are allocated to all components of more than 75 % of HE programmes enabling credit transfer and accumulation, but ECTS credits are not yet linked with learning outcomes
- ECTS credits are allocated in at least 49 % of HE programmes **OR**
a national credit system is used which is not fully compatible with ECTS
- ECTS credits are allocated in less than 49 % of HE programmes **OR**
ECTS is used in all programmes but only for credit transfer

Figures 2.22 shows that the vast majority of systems (38) use ECTS for all higher education programmes. In another 9 systems ECTS use ranges between 75-99% of programmes. These findings are a significant improvement over the 30 and 7 countries respectively found in the corresponding categories in the 2012 report. In these two aspects, ECTS implementation can therefore be considered close to completion.

Figure 2.22: Share of programmes using ECTS credits for accumulation and transfer for all elements of study programmes, 2013/2014

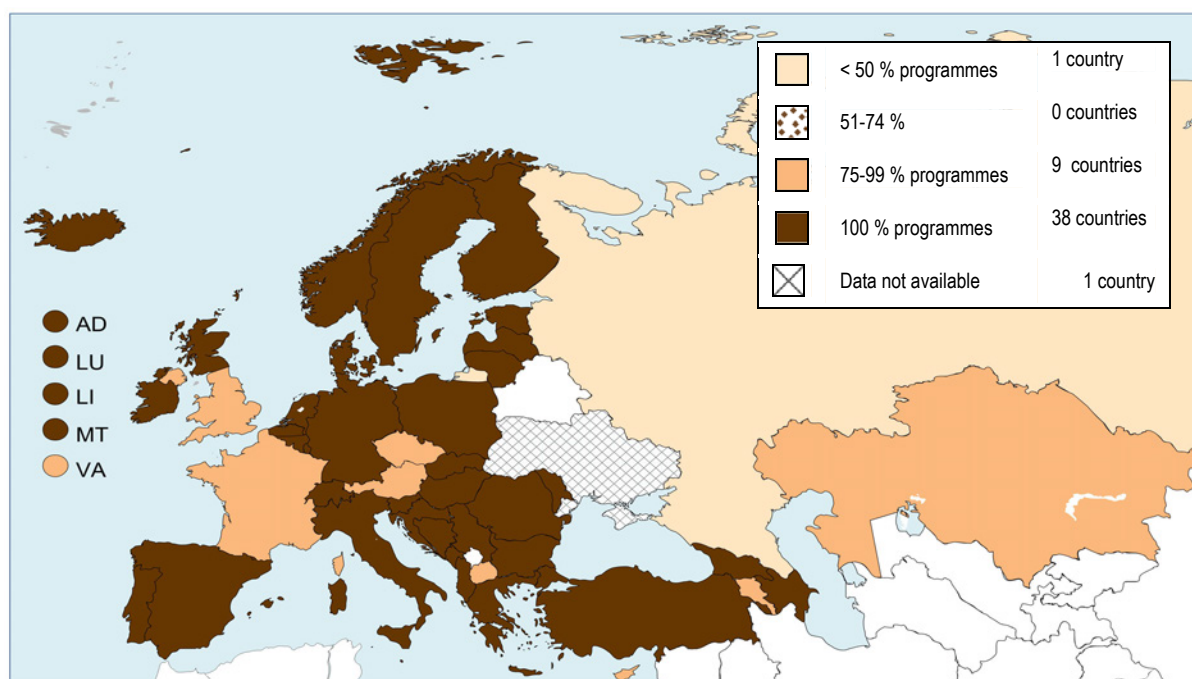
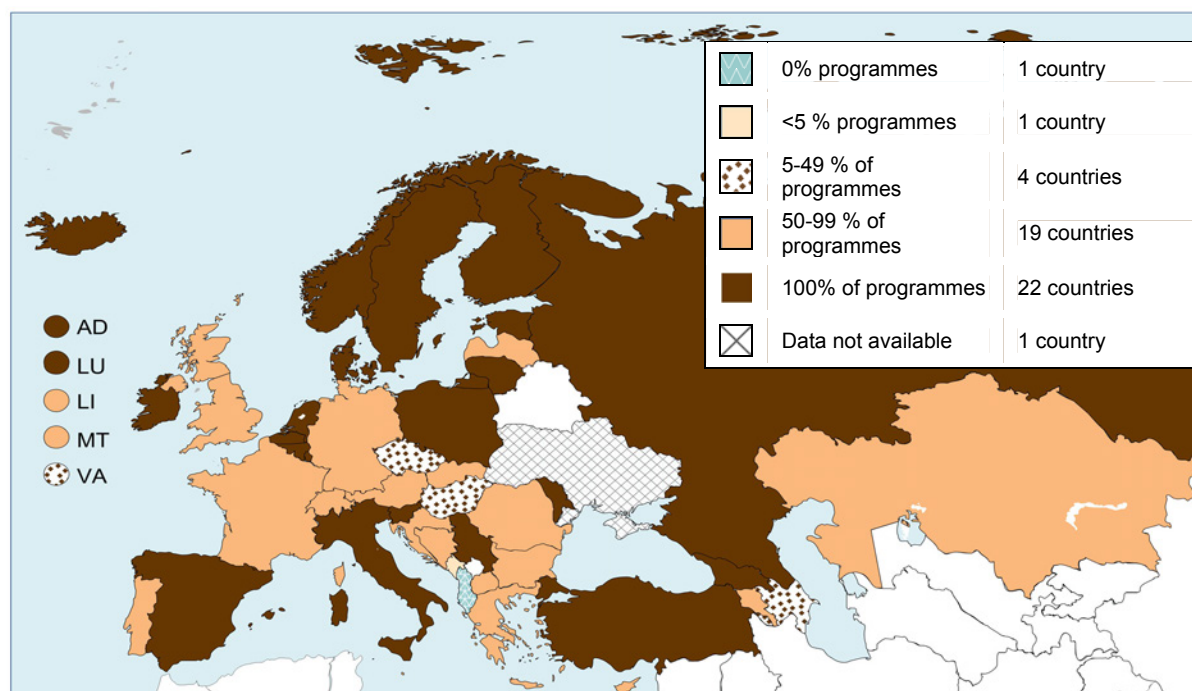


Figure 2.23: Extent to which ECTS credits are linked with learning outcomes in higher education programmes, 2013/2014



The picture regarding the extent to which ECTS credits are linked to learning outcomes is also rather positive (Figure 2.23). 22 higher educational systems estimate that higher education institutions have linked all parts of programmes to learning outcomes while another 19 estimate that 50-99% of their institutions have done so.

There has been visible progress in linking ECTS credits for with the learning outcomes. However, implementation of linking credits with learning outcomes is still lagging behind compared to the achievements of applying ECTS for accumulation and transfer.

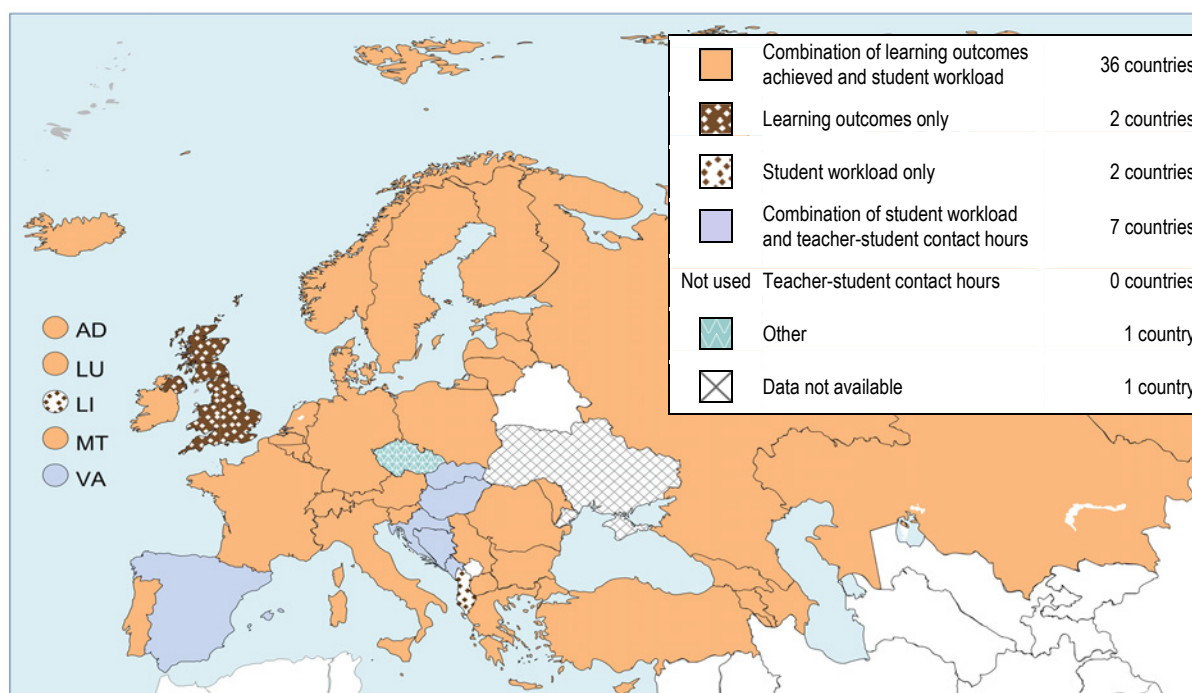
Credit allocation

The new ECTS Guide which has been developed and will be submitted to the Ministerial Conference in Yerevan on 14-15 May, 2015, is based upon the understanding of learning outcomes in the QF-EHEA, i.e. that learning outcomes and the associated workload are intimately linked and that assessment and assessment criteria are also integral to the correct application of a credit system. The Structural Reforms working group noted that the shift to a student centred approach based on learning outcomes is difficult to achieve if the attainment of learning outcomes, and of the ECTS credits associated with them, is not assessed in a consistent and transparent way ⁽¹⁴⁾.

It has been agreed that credits are allocated on the basis of learning outcomes achieved and student workload. 36 systems follow this pattern (Figure 2.24). A second group of seven systems allocate credits on the basis of a combination of student workload and teacher-student contact hours. It should be noted that this combination is not compatible with ECTS. In Albania and Liechtenstein credits are allocated on the basis of student workload only, while in the United Kingdom achieving the student learning outcomes is the only criterion for credit allocation. Finally the Czech Republic reports that learning outcomes may be combined with either student workload or teacher-student contact hours.

⁽¹⁴⁾ Ibid., p.76

Figure 2.24: Basis to award ECTS credit in the majority of higher education institutions, 2013/14



Understanding and usage of learning outcomes

Implementation of ECTS, student-centred learning, qualifications frameworks, internal quality assurance within higher education institutions and other important action lines all depend on successful implementation of learning outcomes. However, it should be kept in mind that the above action lines take more time to implement properly than introducing structural changes. The precondition for the proper introduction of learning outcomes and assessment processes is a change of paradigm from teacher to student-centred learning.

Steering and encouraging the use of learning outcomes in curriculum development has substantially grown. It is stipulated in legislation in 32 higher education systems while 14 encourage learning outcomes through guidelines or recommendations. Only in Albania is there no central encouragement of learning outcomes at all (see Figure 2.25). Compared to previous years, seven more countries encourage the use of learning outcomes through laws or steering documents. This shows that the importance of learning outcomes in programme development has grown.

The use of learning outcomes in student assessment, however, reveals room for development. Indeed Figure 2.26 indicates that the importance of using learning outcomes in student assessment procedures has not yet been widely and fully understood.

Figure 2.25: Steering and/or encouraging use of learning outcomes in national policy for programme development, 2013/14

NB Map image is incorrect and will be updated

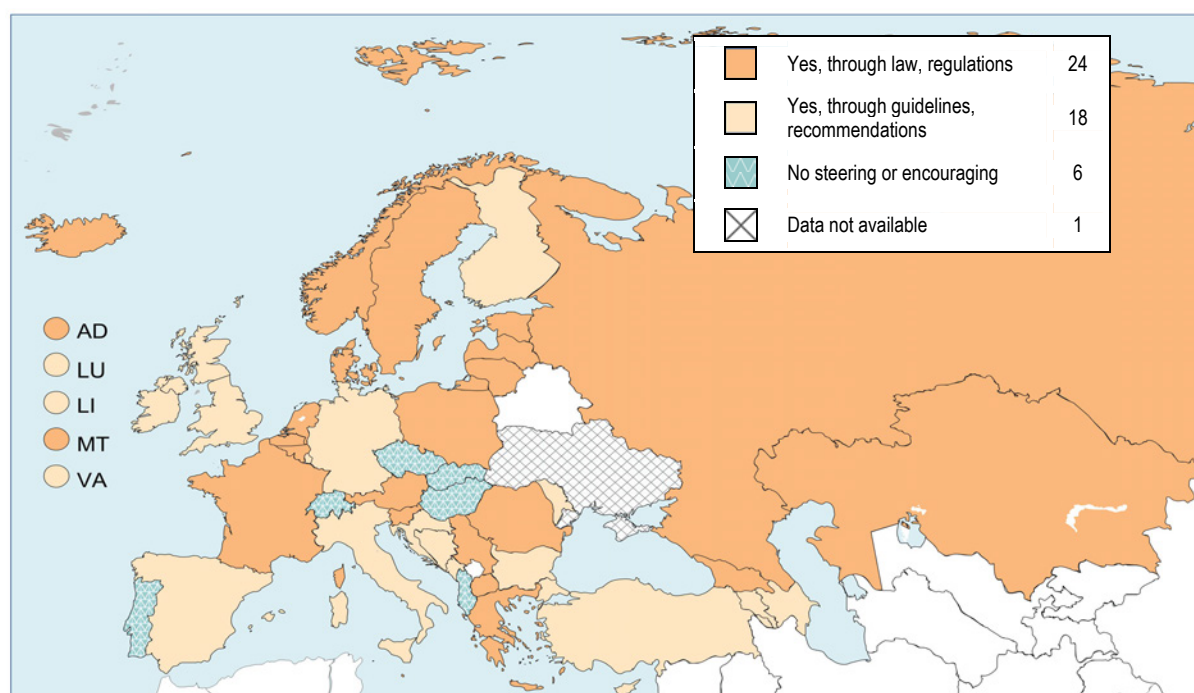
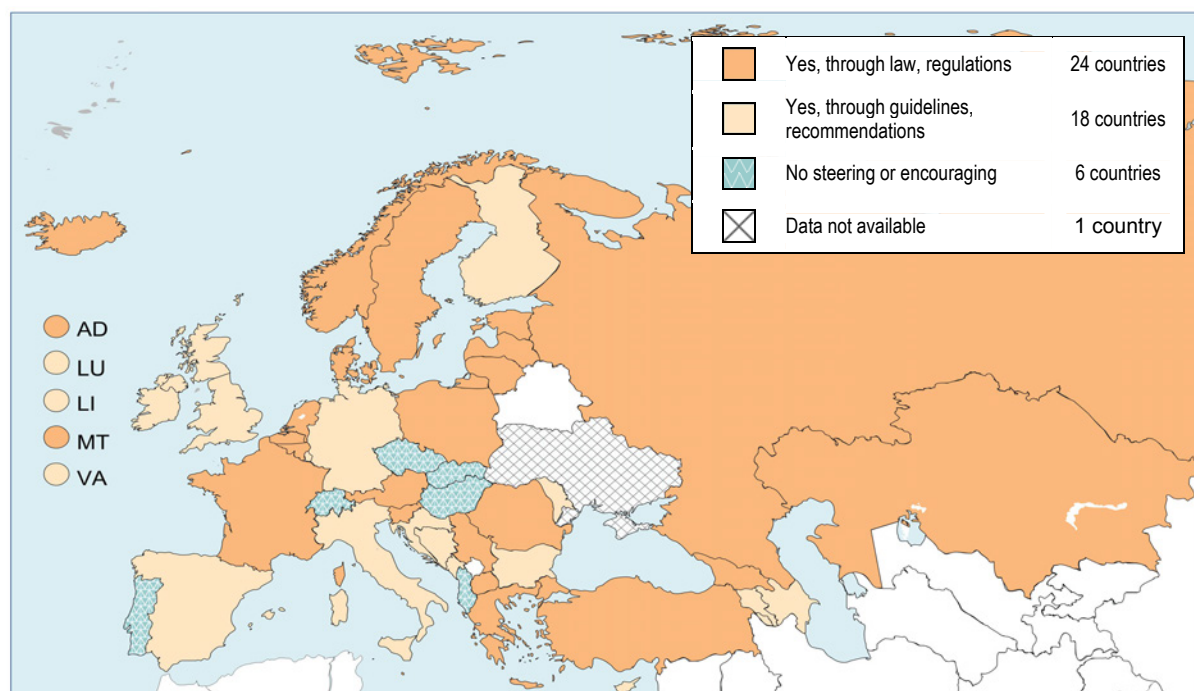


Figure 2.26: Steering and/or encouraging student assessment procedures to focus on learning outcomes, 2013/14



Source: BFUG questionnaire.

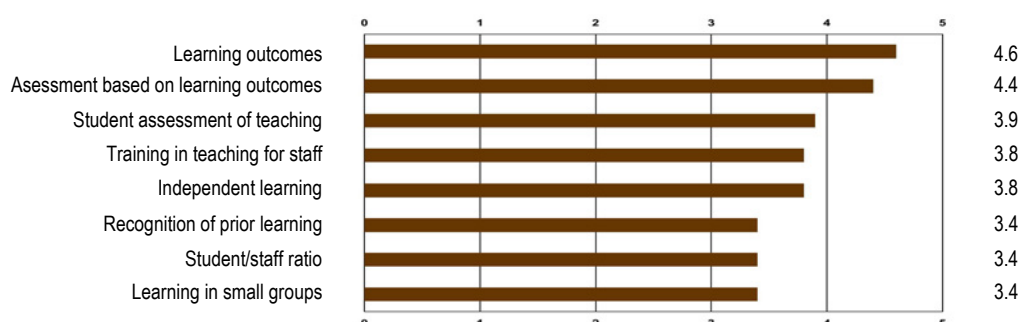
Monitoring of the use of learning outcomes and assessment of student achievements by quality assurance procedures is in place in most higher education systems, the exceptions being Azerbaijan, Cyprus, Montenegro, Slovakia, and Switzerland. Most countries which monitor the use of learning outcomes first refer to external quality assurance and particularly procedures for programme accreditation/approval. It seems that the most widely used model is direct assessment of implementation of learning outcomes by external evaluators. Belgium, the Czech Republic and Finland

mention the involvement of internal quality assurance procedures, with external monitoring in the form of an audit procedure while Armenia uses stakeholders' feedback.

Country perception of the importance of elements of student-centred learning

Countries were asked to score several elements of student-centred learning on a scale from one (not important) to five (see Figure 2.27). It appears that the perception of the elements of student centred learning differ sharply between the group of forty countries in which steering documents mention the concept of student-centred learning (further mentioned as Group A) and the group of eight countries (further mentioned as Group B) in which steering documents doesn't mention the concept of student-centred learning (Figure 2.27 A and B).

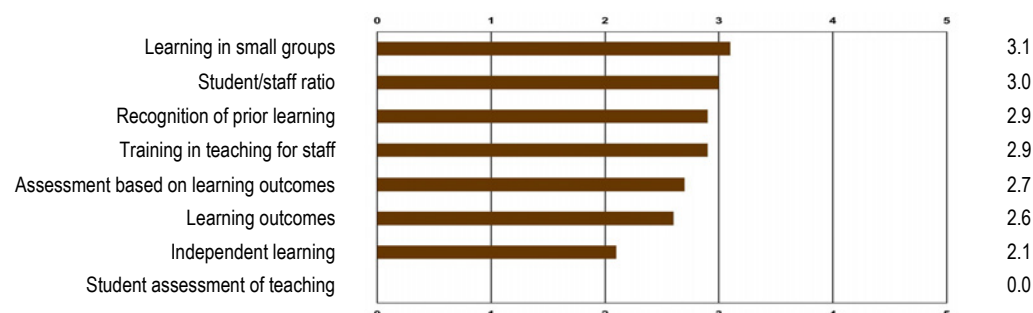
Figure 2.27: Importance of elements of student-centred learning in the eyes of EHEA countries (of total score 5), 2013/14 A – Results for countries where steering documents mention the concept of student-centred learning



Source: BFUG questionnaire

Where student-centred learning is mentioned in laws or steering documents (Group A), all individual aspects of student-centred learning are highly valued. As in the 2012 report, the two most valued elements are learning outcomes and assessment based on learning outcomes which score 4.6 out of 5. Student evaluation of teaching, training in teaching for staff and independent learning come next. Even the three least valued aspects in Group A - Recognition of prior learning, student/staff ration and in small groups are scored at 3,4 out of 5.

B – Results for countries where steering documents don't mention the concept of student-centred learning



Source: BFUG questionnaire.

However, in the second group of 8 countries (Group B) not only is student-centred learning not mentioned in laws or steering documents but the individual aspects of student-centred learning are not considered useful. The average score for all the aspects is 2.4 out of 5 while in Group A it was 4.0. This demonstrates that countries which do not mention student-centred learning in their laws or steering documents do not value student-centred learning.

Furthermore, while in Group A the highest scored aspects were using learning outcomes and assessment based on learning outcomes, in Group B the highest values are given to learning in small groups and the student-staff ratio – issues which were least valued by Group A countries. For Group B

countries, the least valued aspects are student evaluation of teaching which received score zero, followed by independent learning and the use of learning outcomes.

2.2.3. Diploma Supplement

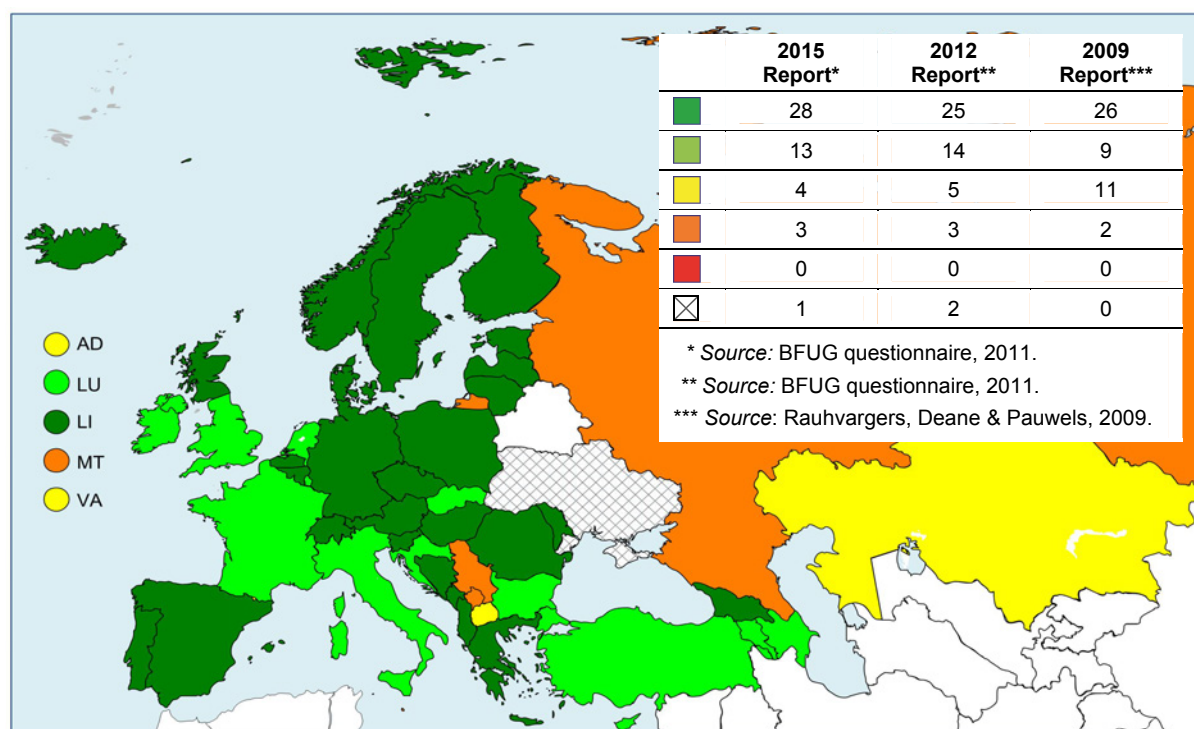
The Diploma Supplement was developed in 1998 by a working group sponsored by the Council of Europe, the European Commission and UNESCO-CEPES, and it was taken up as a transparency tool already in the Bologna Declaration in 1999.

Quantitative data on issuing the Diploma Supplement(DS)






In addition to country scores in the Diploma Supplement indicators (Figure 2.28), the data submitted show that there is improvement compared to 2012. However, two thirds of countries have failed to fulfil all the requirements – that the Diploma Supplement should be issued to every graduate, automatically, in a widely spoken European language and issued free of charge.

The main issue in implementation is issuing Diploma Supplement automatically: only 31 higher education systems (26 in 2012) do so, while only two countries issue the Diploma Supplement for a fee – Montenegro, Serbia and for some groups of students in Russia. Four countries fail to issue Diploma Supplements to some students or in some programmes (Albania, France, Greece and Kazakhstan).

Figure 2.28: Scorecard indicator n°7: Stage of implementation of the Diploma Supplement, 2013/2014*



Scorecard categories

-  Every graduate receives a Diploma Supplement in the EU/CoE/UNESCO Diploma Supplement format and in a widely spoken European language
 - automatically
 - free of charge
-  Every graduate who requests it receives a Diploma Supplement in the EU/CoE/UNESCO Diploma Supplement format and in a widely spoken European language
 - free of charge
- OR
- at least 75% graduate who requests it receives a Diploma Supplement in the EU/CoE/UNESCO Diploma Supplement format and in a widely spoken European language free of charge
 - automatically
 - free of charge
-  A Diploma Supplement in the EU/CoE/UNESCO Diploma Supplement format and in a widely spoken European language is issued to some graduates OR in some programmes free of charge
-  A Diploma Supplement in the EU/CoE/UNESCO Diploma Supplement format and in a widely spoken European language is issued to some graduates OR in some programmes for a fee
-  Systematic issuing of Diploma Supplement in the EU/CoE/UNESCO Diploma Supplement format and in a widely spoken European language has not yet started

Notes:

Indicator measures the implementation of the Diploma Supplement against four criteria:

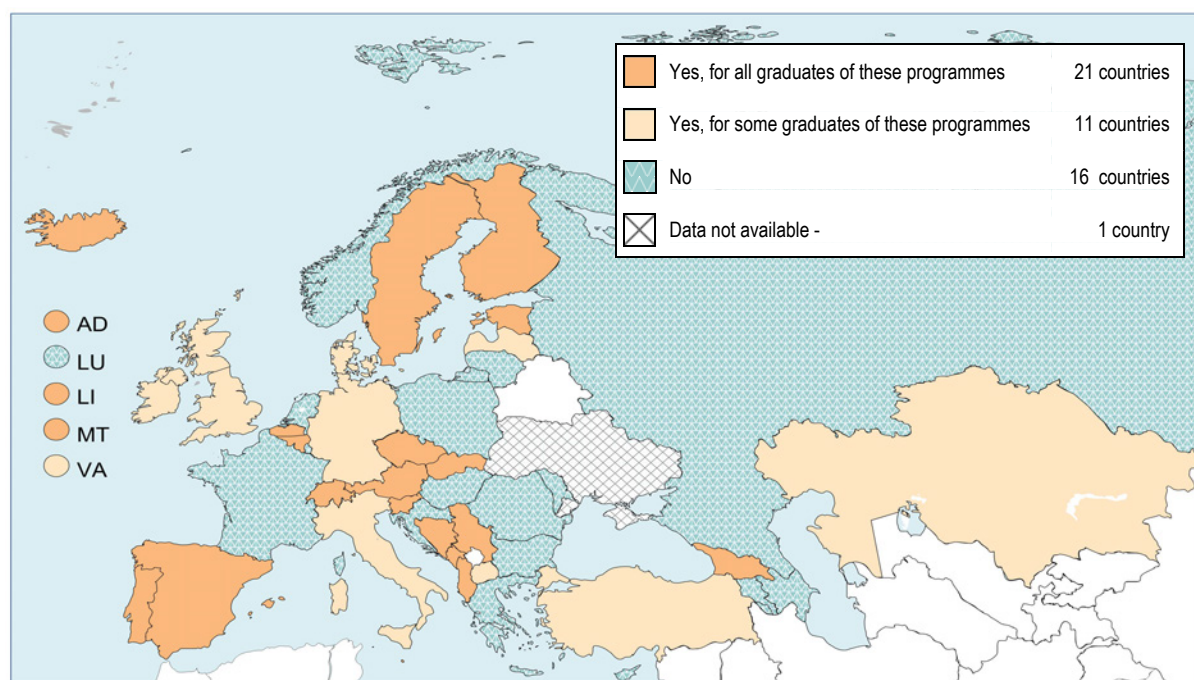
- 1) Diploma Supplement should be issued to every graduate
- 2) Diploma Supplement should be issued automatically,
- 3) Diploma Supplement should be issued in a widely spoken European language;
- 4) Diploma Supplement should be issued free of charge.

All countries issue Diploma Supplements in a widely spoken European language but in some cases only on request (Andorra, Azerbaijan, Russia, Serbia and Slovakia). Most countries choose English as the main non-national language for the DS. Several countries, for instance, Romania, Spain and Turkey also offer the DS in other widespread languages – French, German, Italian or Spanish. In Bosnia-Herzegovina and Switzerland higher education institutions issue diploma supplements in various official languages plus English. Similarly, in the former Yugoslav Republic of Macedonia and Hungary the DS is issued in the official language, minority languages where appropriate and in English, France issues Diploma Supplements in French only, but Ireland and UK in English, while Germany, Italy and Spain automatically issue Diploma Supplements also in English (in Spain there are more options upon request), and Russia offers other widespread languages on request.

In Andorra, Azerbaijan, France, Greece and the Holy See, Diploma Supplements are not issued to all graduates. While in 2012 five countries issued Diploma Supplements for a fee, the number is now three – Montenegro, which introduced such fees in 2013/14, Serbia and Russia. The size of the fee is known only for Serbia and it varies between 50 and 100 Euro.

The issuing of the Diploma Supplement in the third cycle (Fig.2.29), is less widespread than in the first and second cycles, but still two thirds of the countries issue DS to all or some third cycle graduates which was not the case in previous periods.

Figure 2.29: Issuing Diploma Supplement to graduates in the third cycle, 2013/14



Source: BFUG questionnaire.

National monitoring of the effectiveness of the Diploma Supplement

14 higher education systems (against seven in 2012) – report that they have launched studies to monitor how higher education institutions use the Diploma Supplement. The bodies carrying out such monitoring vary widely. It may be the ministry (Belgium (French Community), Kazakhstan, Lithuania and Moldova), the National Board of Education (Finland), an inspectorate (the Netherlands, Serbia), or quality assurance agency (Norway), the Rectors' Conference (Germany), or, in the United Kingdom, the UK Higher Education International Unit.

Checking how employers use the Diploma Supplement is, however, rare and only four countries survey employers on this question. In France the information gathered by the ENIC-NARIC centre demonstrates that employers rarely use the DS. In Germany, however, the results are very different, with more than 70% of German employers considering the issuing of the DS as important, and nearly 50% of the employers considering the submission of a Diploma Supplement as an important criterion for the employment of a candidate. In Moldova and Montenegro monitoring detected that Diploma Supplement is of increasing interest to employers, but that they would like to see the tool to be more informative about the knowledge, skills and competences of the diploma holder. They are ready to cooperate with higher education institutions on these issues.

2.3. Recognition of qualifications

The Bucharest Communiqué underlines the importance of recognition: *“fair academic and professional recognition, including recognition of non-formal and informal learning, is at the core of the EHEA. It is a direct benefit for students' academic mobility, it improves graduates' chances of professional mobility and it represents an accurate measure of the degree of convergence and trust attained”*¹⁵. The Lisbon Recognition Convention (LRC), including its subsidiary texts, is a cornerstone of the EHEA, providing a common and agreed legal basis for recognition in the region and is also the only binding text of the EHEA.

¹⁵ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 4

In the last two decades, various instruments aiming at facilitating fair recognition of foreign qualifications and/or study periods abroad have been developed, and adopted at the European, national, regional and institutional level. Two networks – the ENIC: European Network of Information Centres in the European Region (ENIC) and the National Academic Recognition Information Centres in the European Union (NARIC) work together to provide up-to-date information on current issues in international academic and professional mobility, and on procedures for the recognition of foreign qualifications. Tools such as ECTS, the Diploma Supplement, national qualifications frameworks and the overarching European qualifications frameworks, as well as the European Standards and Guidelines for Quality Assurance of Higher Education (ESG) also serve to improve recognition policy and practice. Yet despite the many efforts made in this area, reporting has shown that the impact on institutional practice, where recognition issues are commonly managed, is insufficient. This may be partly a result of insufficient dissemination and awareness-raising, but may also occur because academics consider that recognition is a technical issue for which they are not responsible. It is therefore important to engage academics in overcoming identified problems so that students can be sure that their degrees or credits gained abroad are recognised fairly and properly.

Ministers in Bucharest committed to the following actions regarding recognition:

- reviewing national legislation to comply with the Lisbon Recognition Convention;
- encouraging higher education institutions and quality assurance agencies to assess institutional recognition procedures in internal and external quality assurance;
- promoting the European Area of Recognition (EAR) manual as a set of guidelines for recognition and a compendium of good practices;
- working together towards the automatic recognition of comparable academic degrees as a long-term goal of the EHEA, building on the tools of the Bologna framework. In this context they agreed to support the work of a pathfinder group of countries exploring ways to achieve automatic academic recognition of comparable degrees.

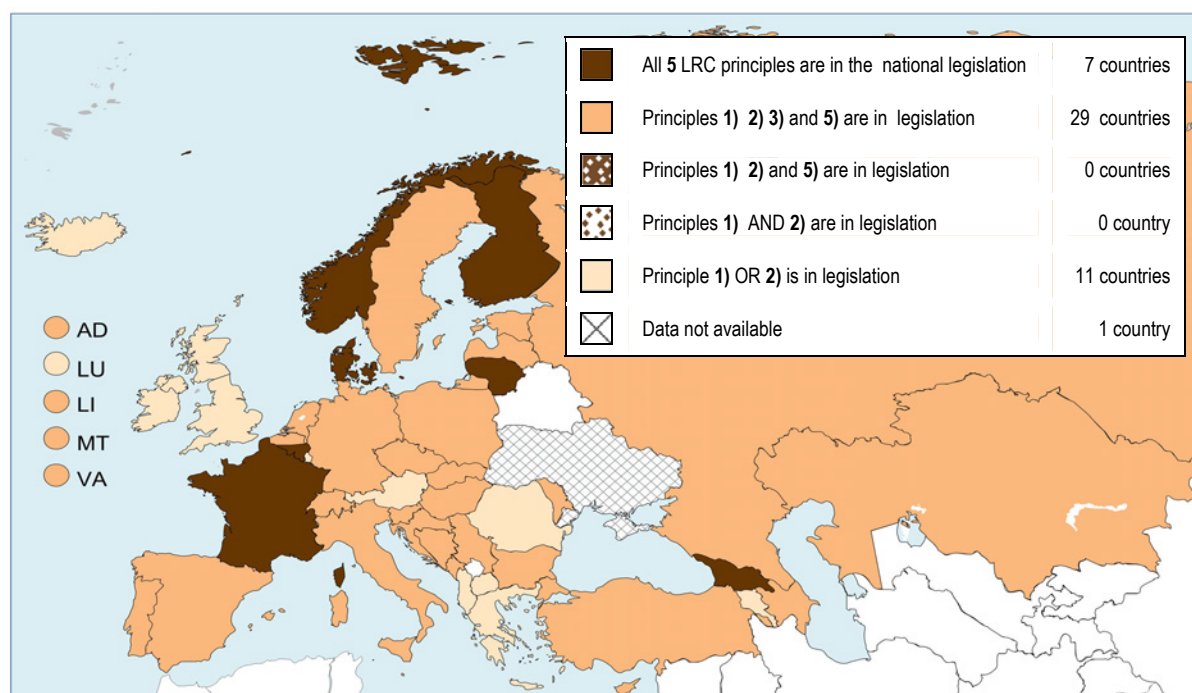
2.3.1. Implementation of the Lisbon Recognition Convention (LRC)

Figure 2.30 shows the extent to which the following five main principles of the LRC are specified in national legislation:

- 1) Applicants have a right to fair assessment;
- 2) There is recognition if no substantial differences can be proven;
- 3) Legislation or guidelines encourage comparing of learning outcomes rather than programme contents;
- 4) In cases of negative decisions the competent recognition authority demonstrates the existence of substantial difference
- 5) Applicant's right to appeal of the recognition decision

In only seven systems – Belgium (French Community), Denmark, Finland, France, Georgia, Lithuania and Norway – are all the main principles specified in national legislation. However, in 29 countries the legislation specifies four of the principles, leaving out the principle that in cases of negative decisions, the competent authority has to demonstrate the existence of substantial difference.

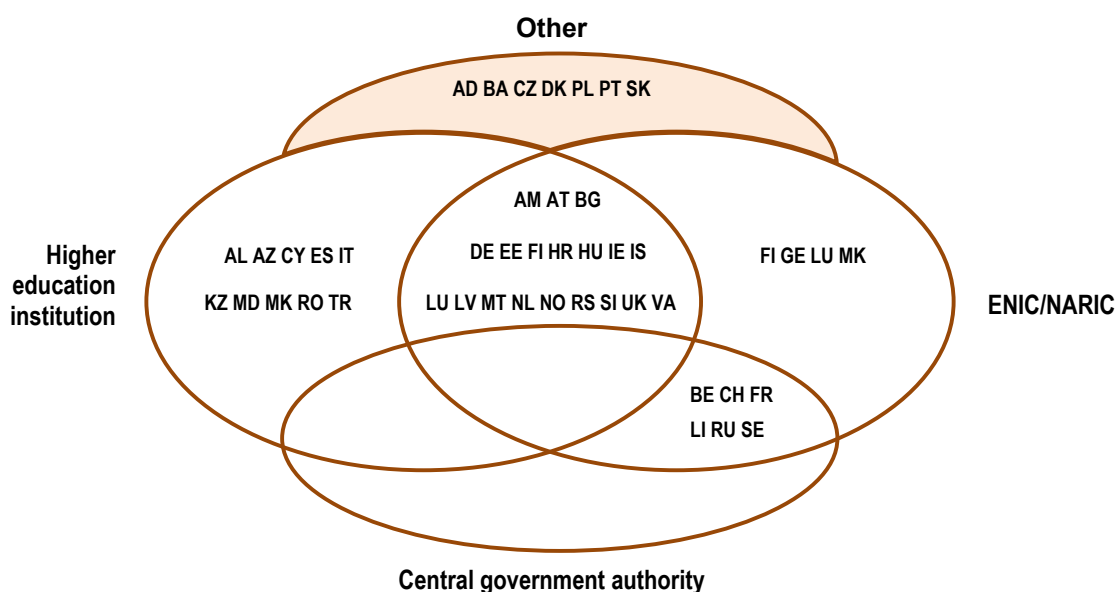
Figure 2.30: Principles of the Lisbon Recognition Convention in national legislation, 2014



The group of 11 countries that have one or none of the LRC principles in the national legislation is not homogeneous, with considerable variation in which principles are stipulated in law but also in how they are implemented in practice. In particular, some countries that have not embedded LRC principles in national legislation are nevertheless known to apply those principles in practice. This finding underlines that formal compliance to the LRC and its subsidiary legal texts does not guarantee proper implementation and equally that fair recognition practices may be commonplace despite the absence of LRC principles in legislation.

As the fact of embedding principles in legislation does not necessarily imply that good recognition practice will be found, the BFUG survey asked for more detailed data than in 2011 regarding which organisation takes final decisions on the recognition of foreign qualifications for academic purposes. Figure 2.31 shows that in the largest group of countries (20), recognition decisions are taken by higher education institutions whose decision are based on ENIC/NARIC centre advice. Higher education institutions in this case make autonomous decisions, but at the same time use the experience and knowledge of the national ENIC/NARIC centre.

Figure 2.31: Institution which makes final decisions on recognising foreign qualifications for academic purposes, 2013/ 2014



Notes:

In Russia, some distinct groups of universities ('federal university' or 'national research university') can make autonomous decisions on recognition.

Ukraine: Data not available

Source: BFUG questionnaire.

In the next group of 7 systems, higher education institutions make autonomous decisions on recognition without advice from the ENIC/NARIC centre. In this case, if the higher education institutions lack specialists in recognition who are familiar with foreign higher education systems, there is a risk of making low-quality decisions.

In another group of 11 countries, final recognition decisions are made by the central government authority (ministry) upon the advice of the ENIC/NARIC. This option therefore draws on the knowledge and experience of the ENIC/NARIC centre, but the higher education institutions are not involved in the decision-making. An important question in these countries is therefore whether recognition of a qualification implies a right of admission to a particular institution and programme, rather than a right to be *considered* for admission as required by the LRC. If recognition implies a right to admission, the higher education institutions are excluded from a decision-making process that affects them directly.

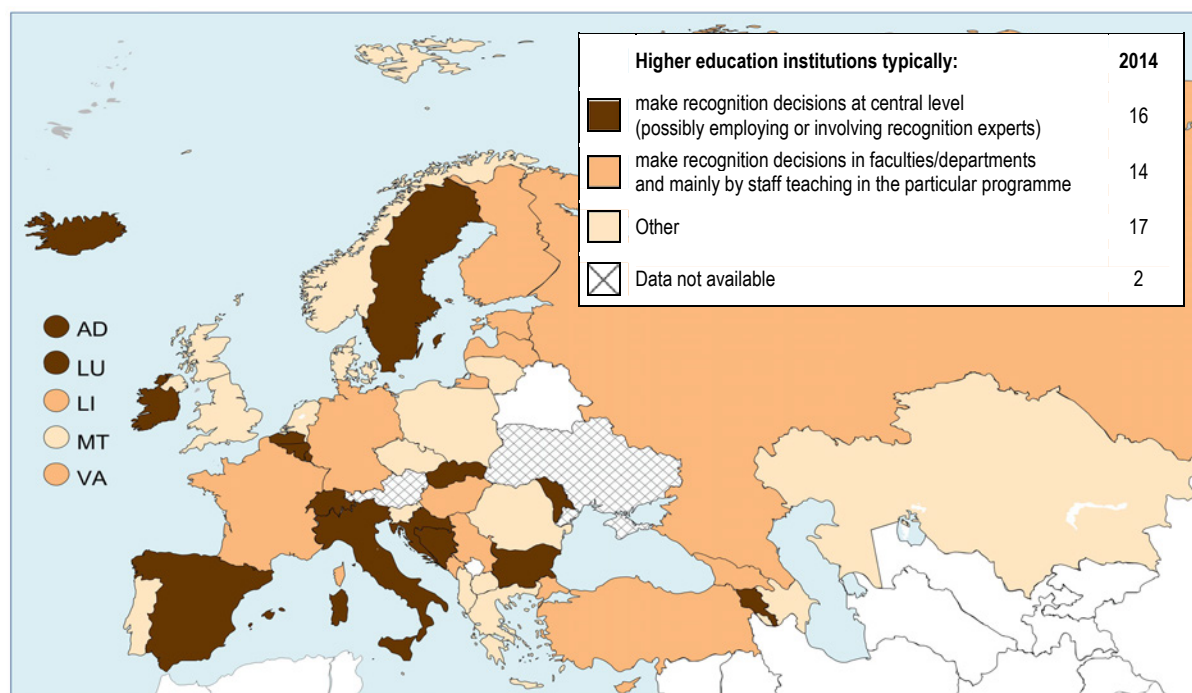
The ENIC/NARIC centres make decisions themselves in 3 countries (Georgia, Greece and Lithuania). This case is similar to the previous one, but with the difference that ENIC/NARIC centres not only evaluate credentials, but also make decisions. Again the knowledge of recognition specialists is used, but higher education institutions are not part of the decision making process.

Six countries describe other specific situations. In Andorra, a government institution acts as an ENIC and makes decisions. Similarly, the Danish ENIC/NARIC office is the central authority situated within the Ministry of Higher Education and Science. Its decisions are legally binding for institutions concerning recognition and access, while institutions take autonomous decisions on admission. In Bosnia-Herzegovina there is no single recognition system due to different legislation in the different federal parts of the country. In the Czech Republic, recognition is decided by a Czech higher education institution which has a programme similar to the one that the applicant has graduated from. In Portugal two systems or practices co-exist: a system of "equivalence", which is based on the

scientific re-evaluation of the work carried out by the applicant, and the more modern approach which is based on the principle of mutual trust.

In more than a third of EHEA countries, recognition of foreign qualifications is carried out by higher education institutions without the advice of specialist ENIC/NARIC centres. It is therefore important to ensure that higher education institutions have the capacity and knowledge to undertake this role.

Figure 2.32: Do higher education institutions typically make recognition decisions centrally? 2014/14



Source: BFUG questionnaire.

Where higher education institutions are responsible for recognition, it is often considered that processes are more effective and fairer when the central level of the institution is involved, preferably with the support of recognition experts. Figure 2.32 shows that in 16 countries higher education institutions typically make recognition decisions at central level, and in another 14 countries such decisions are made in faculties/departments and mainly by staff teaching the particular programme. In addition, there are 17 systems where a different practice can be found.

Countries were also asked about measures to ensure that the LRC is implemented in practice. The most frequently mentioned measure was a national appeals procedure. Most countries explained that this process is managed by a court – although the recommendations in the LRC subsidiary texts warn that it may not be a simple exercise for a foreign student to appeal to a foreign court. Other commonly-mentioned implementation measures involve national laws, regulations, guidelines and instructions, aimed at making the LRC principles binding to higher education institutions. Another often mentioned measure is the publication of procedures and outcomes to ensure transparency in recognition processes. A number of countries mention the work of ENIC/NARIC centres in giving advice, assisting in assessment procedures and training higher education institution staff. Some countries also mention supervision and monitoring, and even inspection of institutional recognition procedures and practices. Finally, some countries highlighted improvement in recognition practice through internal quality assurance procedures and the use of the EAR Manual.

2.3.2. New activities to improve recognition

Including institutional recognition procedures in quality assurance

In all previous Bologna reporting exercises, a significant number of countries have stressed that they are unable to oblige autonomous higher education institutions to implement the principles of the LRC. This issue has therefore been taken up in the context of improving quality assurance, and in particular was addressed in the revision of the ESG. The wording in the final draft of the ESG states:

Fair recognition of higher education qualifications, periods of study and prior learning, including the recognition of non-formal and informal learning are essential components for ensuring the students' progress in higher education institution studies, while promoting mobility. Appropriate recognition procedures rely on

- institutional practice for recognition being in line with the principles of the LRC;
- cooperation with other institutions, quality assurance agencies and the national ENIC/NARIC centre with a view to ensuring coherent recognition across the country ⁽¹⁶⁾.

The above changes to the ESG have the potential to improve the application of recognition procedures within higher education institutions.

European Recognition Area Manual for Higher Education

In 2012 a European Area of Recognition (EAR) manual was launched, and followed two years later by an EAR manual for higher education institutions ⁽¹⁷⁾ produced by seven ENIC/NARIC ⁽¹⁸⁾ centres and representatives of European higher education institutions and students. This manual is designed to assist and enable credential evaluators and admissions officers in higher education institutions to practise fair recognition according to the principles of the Lisbon Recognition Convention (LRC). The manual offers a practical translation of the principles of the LRC, advocating a flexible recognition methodology. The recommendations in this manual are written from the perspective of the European Higher Education Area (EHEA). However, the manual can be used by credential evaluators from all countries that are party to the LRC, (some countries of North America, Asia and Oceania) or by those who have a similar regional convention such as the Asian Pacific and African regions. The manual may be used in different ways, for example as a quick reference guide, as an introduction to the fundamental concepts of recognition or as a training tool. The intention is for this manual to foster a fair recognition culture and support quality enhancement in recognition procedures according to the principles of the LRC.

This work has been followed up through a new project on streamlining institutional recognition (STREAM) that focuses training on various groups of higher education institution staff, including admissions officers, credential evaluators, administrators, and teaching staff with different levels of previous knowledge of recognition.

2.3.3. Work towards the automatic recognition of qualifications

In order to follow up the ministers' commitment to work together towards the automatic recognition of comparable academic degrees as a long-term task of the EHEA, a Pathfinder group was established in 2012. The task of the Pathfinder Group was exploring ways was to study feasibility of establishing

⁽¹⁶⁾ Draft Revised Standards and guidelines for quality assurance in the European Higher Education Area. Standard 1.4 Student admission, progression, recognition and certification. Approved as draft at the BFUG meeting in Roma, 17-18 Sep, 2014.

⁽¹⁷⁾ The European Recognition Manual for Higher Education Institutions. NUFFIC, 2014, 145 p. Internet: <http://eurorecognition.eu/Manual/EAR%20HEI.pdf>

⁽¹⁸⁾ The project team consisted of the national ENIC/NARIC centres of The Netherlands (Nuffic, project leader), France, Poland, Lithuania, Ireland, Latvia and Denmark, the European University Association, Hochschulrektorenkonferenz, Tuning Association and the European Student Union

automatic recognition. The group did it through a series of regional initiatives, by consulting a large number of stakeholders, and through the analysis of existing recognition practices across European Higher education institutions with a survey ⁽¹⁹⁾.

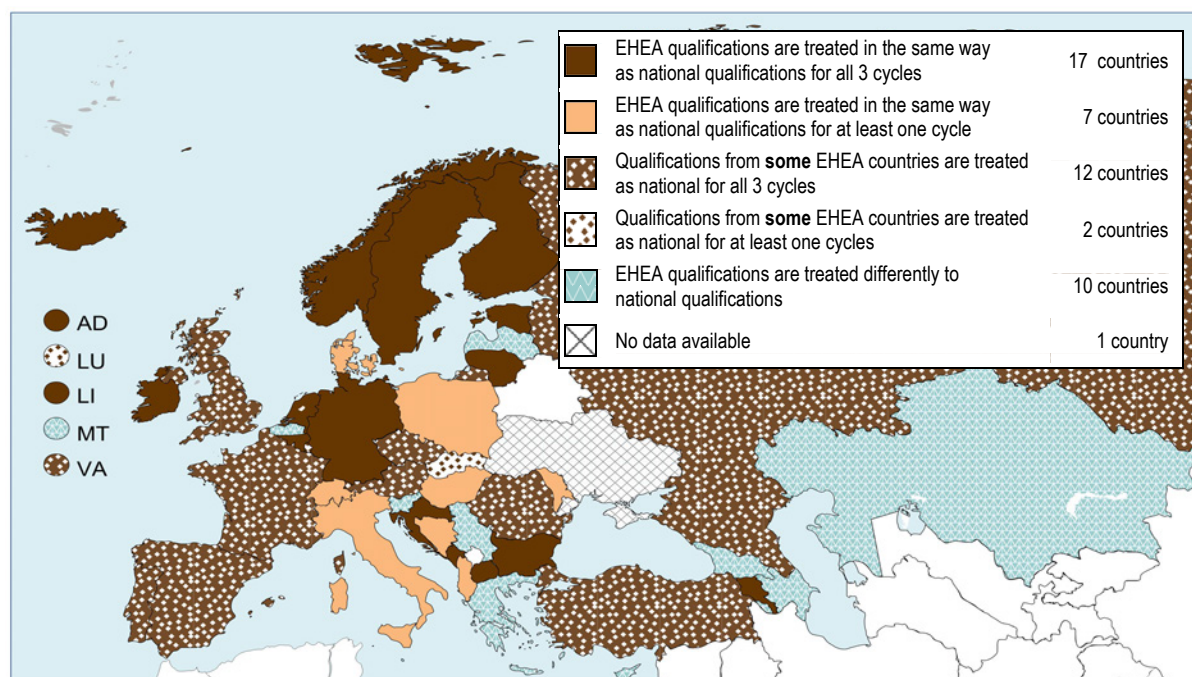
The Pathfinder group has agreed that “automatic recognition of a degree leads to the automatic right of an applicant holding a qualification of a certain level to be considered for entry to a programme of further study in the next level in any other EHEA-country (access)” which could be used as a working definition of the “automatic recognition”.

The Pathfinder group studied the regional initiatives were exploring ways of achieving automatic recognition in the Benelux countries; in the Nordic and Baltic regions, between Germany and neighbouring German-speaking countries and/or regions and also in the South-East Europe Region. According to results of Pathfinder Group work, the automatic recognition is possible.

An important finding of the group is that the automatic recognition of qualifications at system level ⁽²⁰⁾, and in particular for the purpose of accessing the next cycle, was the most promising path to follow. Barriers to automatic recognition should be dismantled through a series of regional initiatives, identifying elements which could be transferred to other countries for strengthening cross border cooperation and which could be transferred to the EHEA as a whole.

According to the BFUG survey, in 14 countries EHEA qualifications are treated in the same way as national qualifications for all three cycles, see Figure 2.33, but in another 8 countries EHEA qualifications are treated in the same way as national qualifications for at least one cycle. In 12 countries qualifications from only some particular countries are treated as the national ones, but in another 2 countries qualifications from only some particular EHEA countries are treated as the national ones in at least one Bologna cycles. Finally, in 12 countries EHEA qualifications are treated differently to national qualifications. This demonstrates that there already is some potential for working towards automatic recognitions at system level in most of the EHEA countries.

Figure 2.33: System-Level recognition of three cycle degrees, 2014/14



⁽¹⁹⁾ For details consult the Report of the Pathfinder Group ([.... internet address](#))

⁽²⁰⁾ 'Recognition at **system level**' should be understood as a general recognition that a bachelor of country A is recognised as a bachelor in country B.

However, to achieve automatic recognition as a long-term goal of the EHEA can be achieved if the political commitment is upheld. Therefore, in addition to recommending the recognition of foreign qualifications on an equal level with domestic qualifications, the Pathfinder Group recommends to Ministers a number of smaller steps. Some of the advised steps are new initiatives while a number of those are the issues which are known for years but that have not (properly) implemented in some countries. The main Pathfinder group recommendations to ministers are: ensure that qualifications from other EHEA countries are recognised on an equal level with domestic qualifications; advise credential evaluators in Higher education institutions on properly implementing the LRC; increase the use of qualitative criteria in recognition, such as use of learning outcomes and qualifications frameworks in recognition; endorse the recently published European Recognition Area Manual for Higher education institutions; establish four-month maximum time limit for recognition processes; use of modern technologies in recognition; support the role of quality assurance in recognition; increase the usefulness of the Diploma Supplement; explore the potential for system level automatic recognition on a regional basis; etc.

Conclusions

Degree system

There is no single model of first-cycle programmes in the EHEA. Most countries combine programmes of 180 ECTS and 240 ECTS. In some countries the number of (usually professional) programmes using the 210 ECTS model is significant as well.

In the second cycle, the most common model is 120 ECTS – two thirds of programmes follow this workload. The other models are less widespread in the EHEA as a whole but they are dominating in particular countries, e.g. 90 ECTS in Cyprus, Ireland and United Kingdom (Scotland) and 60-75 ECTS in Montenegro, Serbia and Spain.

The differences in the total workload of the first and second cycles can vary by up to 120 ECTS credits. Such a large difference in the total workload of first and second qualifications may cause problems in recognition of second cycle qualifications in particular

Access to the next cycle

Access to the next cycle (according to the Lisbon Recognition Convention definition) is generally smooth. The cases where access is not granted most often occur where the applicant has graduated from a professional programme but applies for admission to an academic programme in the next cycle (or vice versa) and where the applicant holds a qualification which does not follow the Bologna pattern.

For access to second cycle programmes, the vast majority of the countries do not apply general rules requiring additional examinations, additional courses or having work experience. However, about half of the countries may apply such measures in some cases. According to country comments, the “some cases” actually mean that a small share of applicants are affected by those measures, mainly students applying for admission to a programme of creative arts, sports, or other programme for which specific skills are necessary. However, there are 8 countries where sitting additional examinations is a rule for all students.

There are two groups of applicants who have to fulfil additional requirements: those holding a professional first cycle degree applying for admission to an academic second cycle programmes, and those who hold a first cycle qualification in a different study field. In some countries applicants who

have a degree in the same field but come from a different higher education institution are also affected.

The share of first-cycle students continuing studies in a second-cycle programme after graduation from the first cycle varies among the countries. While in some countries only 1-25% of first cycle graduates go on to studies in the second cycle, in other countries as many as 75-100% do.

Short-cycle qualifications

The situation of the short-cycle qualifications varies strongly across the EHEA. Short cycle qualifications can be part of higher education, part of post-secondary vocational education and even part of secondary education. When continuing in first-cycle programmes, short-cycle graduates gain different numbers of credits – from full credit down to zero credits.

The names of the short-cycle qualifications are diverse and the differences are not simply linguistic differences, but rather demonstrate the different situations of the short-cycle education in the national education system.

Short cycle programmes and qualifications should be addressed in the next period with a view to improve higher education institutions' readability and international comparability.

Bologna tools

While thirty eight countries are in the 'green zone' regarding the implementation of national qualifications frameworks, but at the same time twelve countries still have not started the implementation at programme and institution level, and some of them show no progress since 2012.

A majority of countries still face challenges in including non-formal qualifications within national higher education frameworks self-certified against the QF-EHEA.

There is progress in ECTS implementation since 2012. Using ECTS for both accumulation and transfer is implemented to some extent practically everywhere. Linking credits with learning outcomes has progressed as well, but more efforts are needed.

Regarding the Diploma Supplement, there is improvement compared to 2012. However, two thirds of countries have failed to fulfil all the requirements – that the Diploma Supplement should be issued to every graduate, automatically, in a widely spoken European language and issued free of charge. The least achieved requirement is the automatic issuing of Diploma Supplements.

Student-centred learning

Steering and encouraging the use of learning outcomes in curriculum development has substantially grown. However; the use of learning outcomes in student assessment is much less widespread.

In the great majority of countries, student-centred learning is mentioned in laws or steering documents and all individual aspects of student-centred learning are highly valued. However, in another group of 8 countries not only is student-centred learning not mentioned in laws or steering documents but the individual aspects of the student-centred learning are not considered useful. The most critical problems for these countries are higher education institutions' lack of esteem for student evaluation of teaching, independent learning and the use of learning outcomes.

Recognition

In more than two thirds of countries higher education institutions make the final decision upon recognition of the foreign qualifications, but recognition of credits gained abroad is fully in the hands of higher education institutions.

Since recognition of credits is done without consulting ENIC/NARIC centres, and recognition of foreign qualifications is carried out by higher education institutions without advice of ENIC/NARIC centres in 1/3 of countries, it is important to improve the knowledge and capacity of higher education institutions to undertake this role.

Including the institutional recognition procedures into the ESG and the development of the European Recognition Area Manual specifically for the use of higher education institutions and the training platform for various levels of staff, students and holders of foreign credentials or study periods abroad should improve recognition within higher education institutions.

Nearly three quarters of qualifications from at least some of the EHEA countries are treated equally as national qualifications. This demonstrates that there already is some potential for working towards automatic recognition at system level in most EHEA countries.

Automatic recognition at education system level is feasible and possible. Automatic recognition leads to the automatic right of an applicant holding a qualification of a certain level to be considered for entry to a programme of further study in the next level in any other EHEA-country (access).

Automatic recognition as a long-term goal of the EHEA can be achieved if the political commitment is pursued. Pathfinder group recommendations to ministers are: ensure that qualifications from other EHEA countries are recognised on an equal level with domestic qualifications; advise credential evaluators in higher education institutions on properly implementing the LRC; increase the use of qualitative criteria in recognition, such as use of learning outcomes and qualifications frameworks in recognition; endorse the recently published European Recognition Area Manual for higher education institutions; establish four-month maximum time limit for recognition processes; use of modern technologies in recognition; support the role of quality assurance in recognition; increase the usefulness of the Diploma Supplement; explore the potential for system level automatic recognition on a regional basis.

CHAPTER 3: QUALITY ASSURANCE

The Bucharest Communiqué

The aspiration to improve the quality of higher education provision throughout the European Higher Education Area lies at the core of the Bologna Process, and has underpinned major developments in quality assurance during the last 15 years. The Bucharest Communiqué stresses the importance of quality assurance in building trust and reinforcing the attractiveness of higher education in the EHEA. The Communiqué acknowledges the role of the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) in binding countries to common objectives with regard to quality assurance, and also calls on the ESG to be revised to improve clarity, applicability and usefulness. The Communiqué can also be considered as a key moment in the development of the European Quality Assurance Register for Higher Education (EQAR), with the commitment made to *"allow EQAR-registered agencies to perform their activities across the EHEA, while complying with national requirements. In particular we will aim to recognise quality assurance decisions of EQAR registered agencies on joint and double degree programmes."*¹

It is also worth pointing out that the Bucharest Communiqué places the issues of the social dimension firmly under the heading of "Providing quality higher education for all", thus linking overall quality goals in higher education to the development of quality assurance systems.

The 2012 Bologna Implementation Report

The 2012 report highlighted the momentum of developments in quality assurance across Europe, stressing the important role for the ESG, and also showing that systems are often becoming complex as societal demands increase. Given this reality, the report stressed that issues regarding stakeholder involvement in quality assurance systems remain relevant, and that there is a need to be vigilant that the further development of quality assurance systems continues to support higher education institutions in their role of assuming primary responsibility for quality assurance. The report also underlined the fact that, although the EQAR has been established and is developing well, many countries remain reluctant to devolve responsibility for external quality assurance beyond national boundaries.

Chapter outline

This chapter deals with the progress made to develop quality assurance systems across the European Higher Education Area and covers both internal and external quality assurance. The main focus is on how quality assurance systems are responding to the evolving policy agenda, in relation to the ESG. After examining how national systems relate to the development of internal quality assurance, it looks at the main distinctions in European quality assurance systems, as well as the development of trends towards greater internationalisation and cross border quality assurance. The chapter also tracks the involvement of different key stakeholders, and considers the range of issues and challenges being addressed by quality assurance.

¹ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 2,

3.1. Internal quality assurance

Quality assurance in higher education can be understood as policies, procedures and practices that are designed to achieve, maintain or enhance quality as it is understood in a specific context. Already in 2003, Ministers recognised that 'the quality of higher education has proven to be at the heart of the setting up of a European Higher Education Area.' They also stressed that 'the primary responsibility for quality assurance in higher education lies with each institution itself and this provides the basis for real accountability...'

The Bologna process has overseen the development of quality assurance systems which, through the ESG, follow these principles. This chapter therefore also looks firstly at the role of higher education institutions in developing robust internal quality assurance systems. However, as there has been no direct input from higher education institutions themselves, information on internal quality assurance systems is necessarily limited to an overview of requirements made by national systems regarding internal quality assurance within higher education institutions.

3.1.1. Formal requirements for higher education institutions to establish internal quality assurance systems

Nearly all countries require higher education institutions to establish internal quality assurance systems. Indeed the only EHEA countries where this is not a formal requirement are Estonia and Switzerland. Such requirements are usually specified in legislation, and there has been little change since the 2012 report.

3.1.2. Responsibility for the focus of internal quality assurance systems

The findings with regard to responsibility for the focus of internal quality assurance systems also echo the 2012 report. In an overwhelming number of systems (37) it is the higher education institutions themselves who hold this responsibility. Where this is not the case, most countries report that it is a combination of Ministry, quality assurance agency and the institution that determine the focus of the system.

The interpretation of this finding should also take account of factors which influence higher education institutions in exercising their autonomy. Notably, several countries point out that the external quality assurance framework is tightly defined. Therefore, even if higher education institutions formally have the responsibility for deciding on the focus of their internal quality assurance system, in reality the external quality assurance framework limits substantially their margin for decision-making.

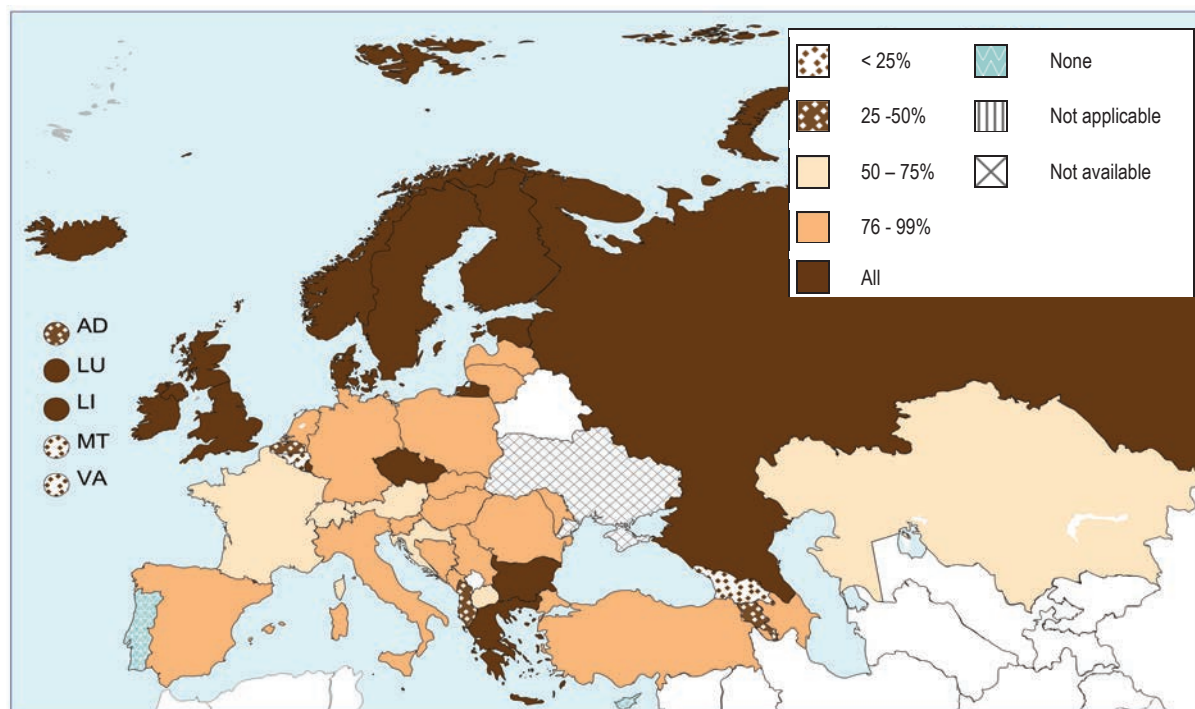
3.1.3. Institutional strategies for continuous quality improvement

Many countries report positive findings regarding the number of institutions that have published a strategy for continuous quality improvement in the past five years. Indeed, 33 national systems consider this number to be in excess of 75 % of their higher education institutions, with 15 systems claiming that all higher education institutions have published such a strategy. This figure represents a slight increase from the estimations in the 2012 report, where 12 systems considered that all institutions published such a strategy.

At the other end of the scale only six systems estimate that less than 25 % of institutions have published such a strategy, compared to 11 in 2012. Four systems estimate 25 - 50 %, and five estimate between 50 and 75 %. Overall, since such strategies are considered as a positive action in

strengthening internal quality assurance, these findings show significant improvement over the situation reported in 2012.

Figure 3.1: Publication of institutional strategies for continuous quality enhancement in the past 5 years, 2013/14



Source: BFUG questionnaire

3.2. External quality assurance

3.2.1. Character and orientation of national quality assurance systems

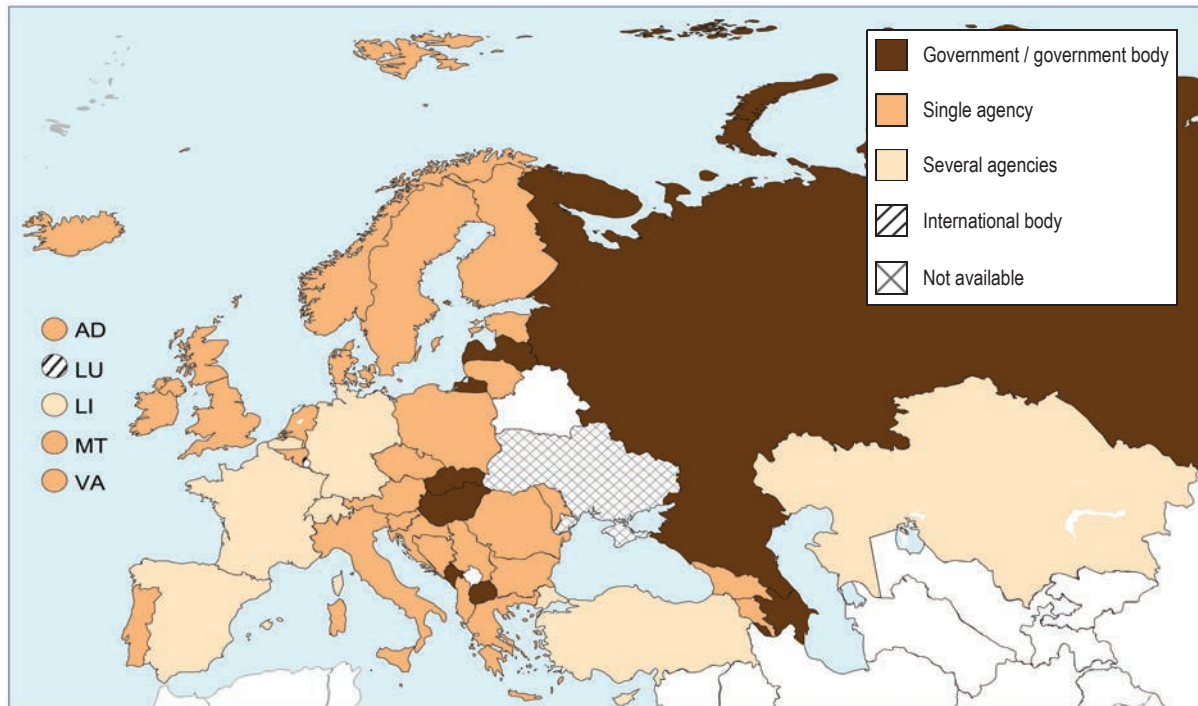
Throughout a period of rapid change in higher education systems, the role of quality assurance has been constantly and quickly evolving. When the Bologna Declaration was signed in 1999, only a handful of countries had a recognisable quality assurance system, and external quality assurance agencies were few and far between. The picture 15 years on is vastly different, with 22 countries having established external quality assurance agencies since the process was launched. Improving the quality and relevance of higher education, and establishing trustworthy quality assurance systems has been a high priority for many if not all countries, and developments have been fast moving.

Figure 3.2 illustrates that the rise of quality assurance agencies has been a major trend. Only a few countries (Azerbaijan, The former Yugoslav Republic of Macedonia, Hungary, Montenegro, Russia Slovakia) retain a system where a Ministry or Ministry body has direct responsibility for quality assurance. During a transition period, it is also the reality of Latvia, while the government aims at the development of an improved quality assurance system. Malta is also in the process of establishing a national agency.

Several countries have taken an alternative approach to external quality assurance, rather than establishing a national quality assurance agency. Some have put in place a system whereby a national committee is entrusted with the quality assurance of the higher education system, under the direct authority of the ministry (Czech Republic, Hungary, Iceland, Slovakia). Luxembourg and Liechtenstein are countries where the small size of the system has also led to a different solution. In

Luxembourg there is a council that bases its work on the international expertise of 7 experts acting independently. Liechtenstein requires its institutions to be accredited by a foreign quality assurance agency that works in compliance with the ESG, attested through EQAR registration. All other systems in the European higher education area are now functioning with professional quality assurance agencies.

Figure 3.2. Responsibility for external quality assurance, 2013/14

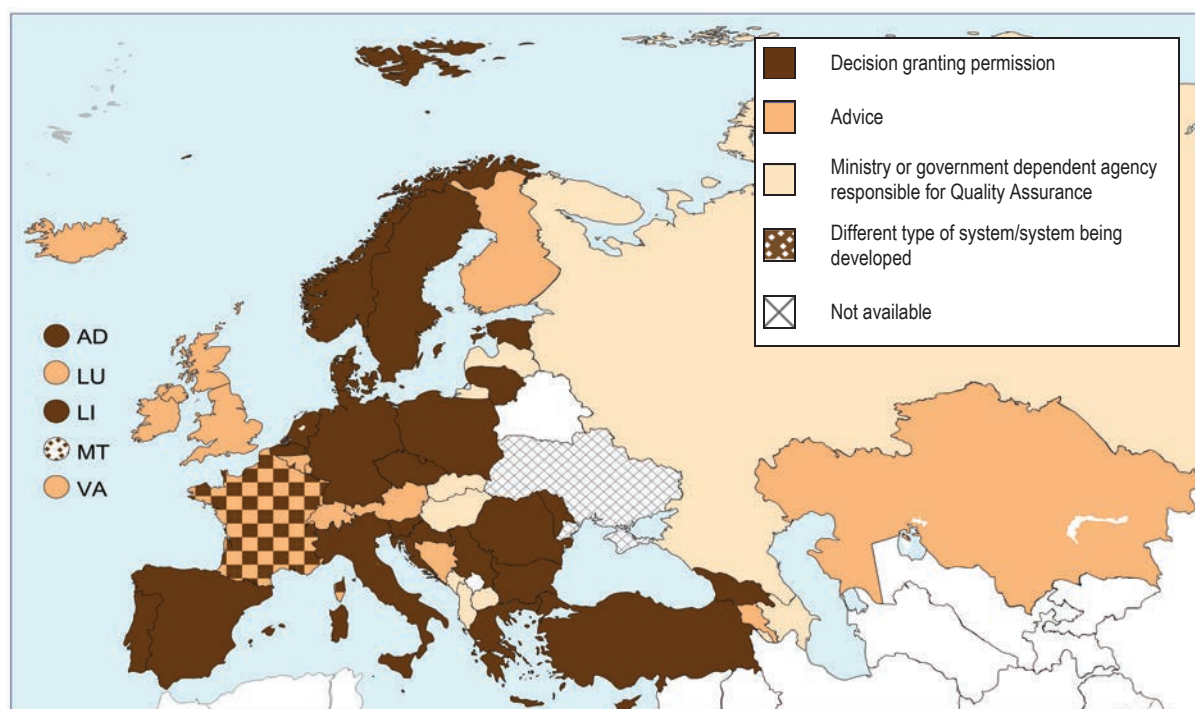


Source: BFUG questionnaire

Although practically all EHEA countries have established some form of external quality assurance system, there are significant differences in the approach behind systems. One important distinction that can be drawn is whether the primary aim and orientation of external quality assurance is to regulate institutions and programmes – deciding which of them have a sufficient threshold of quality to operate, or alternatively whether the main thrust of quality assurance is to support improvement in the quality of provision.

In systems where responsible quality assurance bodies/agencies have the power to permit or refuse programmes and/or institutions to operate, or where they advise governments on such decisions, quality assurance can, in broad terms, be perceived as supervisory in character. In these cases, it generally aims to ensure that minimum quality thresholds are met. Agencies may of course play other roles – including giving advice on the enhancement of quality. This is indeed specifically mentioned in a number of countries, but all these additional roles are likely to be subordinate to the decision of permitting programmes and/or institutions to operate.

Figure 3.3: Main outcome of external evaluation by QA agency, 2013/14



Source: BFUG questionnaire

The majority of systems across the EHEA are, using this categorisation, more supervisory in character. Indeed systems that have established agencies with decision-making powers outnumber by two to one those where agencies are advisory and more enhancement-oriented in character.

The impact of external quality assurance on funding varies considerably according to the characteristics of the system. In most cases where quality assurance systems are more supervisory in character, there is an impact on programme and/or institutional funding from the decisions related to evaluation. However, this is not the case in 8 such systems, where there is no impact on funding. Systems where quality assurance is enhancement oriented most commonly see little or no impact on funding.

Unsurprisingly, the picture has changed little since the 2012 report. The main developments were reported in Latvia and Malta, where both countries are currently in the process of re-thinking the quality assurance system. Latvia, after a long period of having a single independent national agency; is undertaking improvement-oriented reforms of the quality assurance system. During the transition period the ministry is responsible for quality assurance, delegating the task to a commission consisting of stakeholders. The re-establishment of an improved quality assurance system has been defined as one of the priority tasks for the government.

Malta is also in the process of establishing a new system. A national quality assurance agency has been established, which is Government funded and appointed but it is hoped will have sufficient legal and operational independence. The agency is in the process of developing its external quality audit mechanism which should be implemented in the second half of 2015.

Russia, by far the largest system in the EHEA, also stands out as a country showing variants from the main European developments in quality assurance. In particular, the system is one of state accreditation, although there are also quality assurance agencies offering services to institutions and working in compliance with the ESG.

3.2.2. Focus of External Quality Assurance

Another important distinction is whether external quality assurance focuses on the quality of programmes or looks at institutions as a whole.

In this respect it is noteworthy that the vast majority of quality assurance systems (26) now focus on a combination of institutions and programmes. Only three systems - Belgium (French Community), Czech Republic and Sweden - now focus more exclusively on programmes (although in the French Community of Belgium there are also elements of institutional evaluation) and another three countries – Bosnia and Herzegovina, Finland and the United Kingdom – focus on institutions. Overall, this picture suggests that quality assurance systems are becoming more complex, and dealing with more information at different levels.

From the questionnaire responses, there appears to be a high degree of consensus on the issues under consideration during external quality assurance evaluations in different EHEA countries. Unsurprisingly, all countries state that teaching forms part of the evaluation process, while the vast majority also include research. Where research is not included, it tends to be evaluated under a separate quality assurance process.

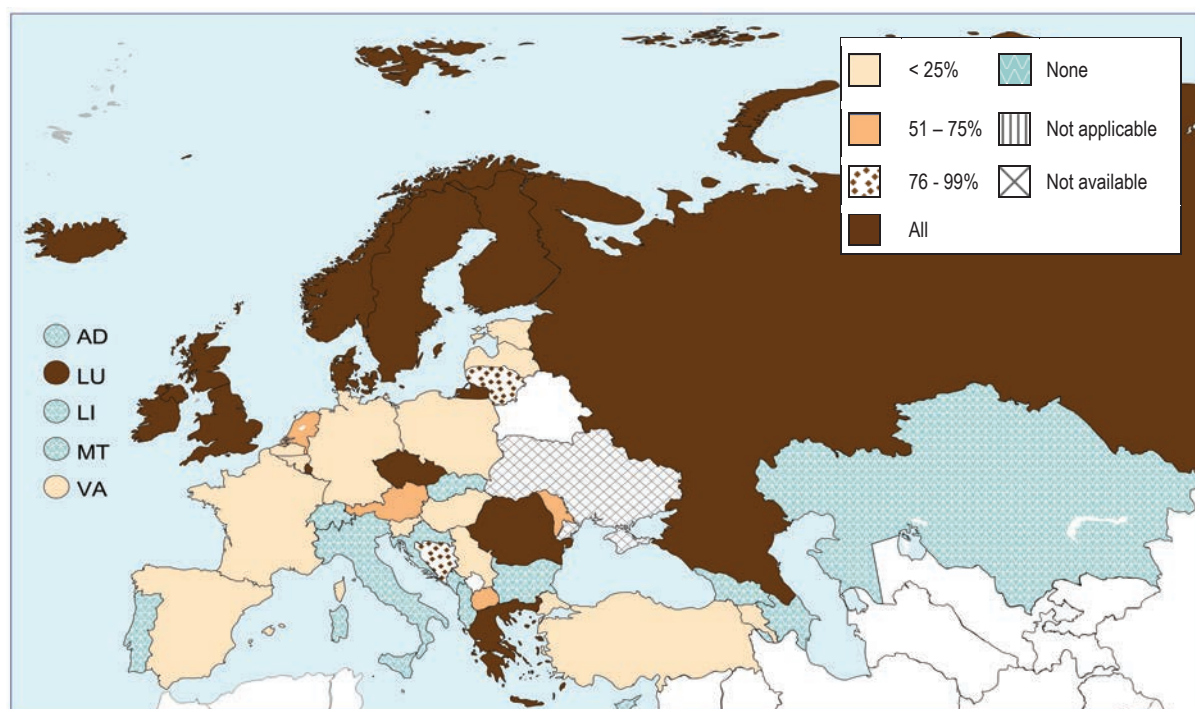
Other topics, such as student services, admissions systems and the internal management of higher education institutions are also frequently cited as being subject to external attention. The focus of these aspects can also be linked to the implementation of the ESG, which serve as a reference framework for the implementation of quality systems at national and institutional level. While most countries also claim that quality assurance examines entry, dropout and completion rates, the fact that data on these topics is so infrequently monitored at national level (see Chapter 4) suggests that this finding may require more in-depth investigation. Lifelong learning provision is less often considered as a topic typically evaluated in external quality assurance, but is still mentioned by around half of the countries.

Some national systems give examples which extend beyond these topics. A number of countries mention learning outcomes or the outcomes of programmes in a more general sense as the key focus of their evaluations. In Finland, in addition to the more standard topics listed above, institutions have the possibility to be evaluated in relation to matters such as student well-being, study guidance systems, entrepreneurship or sustainable development. Similarly in the Netherlands, the accreditation system recognises additional 'extraordinary characteristics' for institutions and programmes, such as internationalisation and entrepreneurial education.

3.2.3. Publication of critical and negative evaluation reports

One important aspect of quality assurance is developing transparency and thus better ensuring accountability. In this respect it is interesting to track changes regarding the publication of critical and negative evaluation reports, as it is of course easier to be transparent in publishing positive outcomes. Countries have therefore been asked to estimate the number of institutions that publish critical and negative evaluation reports, and the picture that emerges is presented in figure 3.4.

Figure 3.4: Publication of critical and negative outcomes by higher education institutions, 2013/14



Source: BFUG questionnaire

The picture regarding the number of institutions that publish critical and negative outcomes of quality assurance shows some development from the 2012 report. At that time, only six systems indicated that all institutions publish these reports while this number has now more than doubled to 13. A further 12 systems estimate that more than 51% of institutions publish such outcomes. At the other end of the scale the number of systems which stated that none of their institutions publish such critical reports was 22 in 2012, and this has now reduced to 15. A further 14 systems estimate that less than 25% of institutions publish such reports.

In addition to these findings, a considerable number of countries point out that negative outcomes of quality assurance evaluations are made publically available, but are not published by higher education institutions themselves. Typically in these situations it is the quality assurance agency that publishes this information.

These findings suggest that greater transparency of information is accompanying the development of quality assurance systems, with higher education institutions being encouraged and/or obliged to publish outcomes of quality assurance reviews – whether they are critical or not.

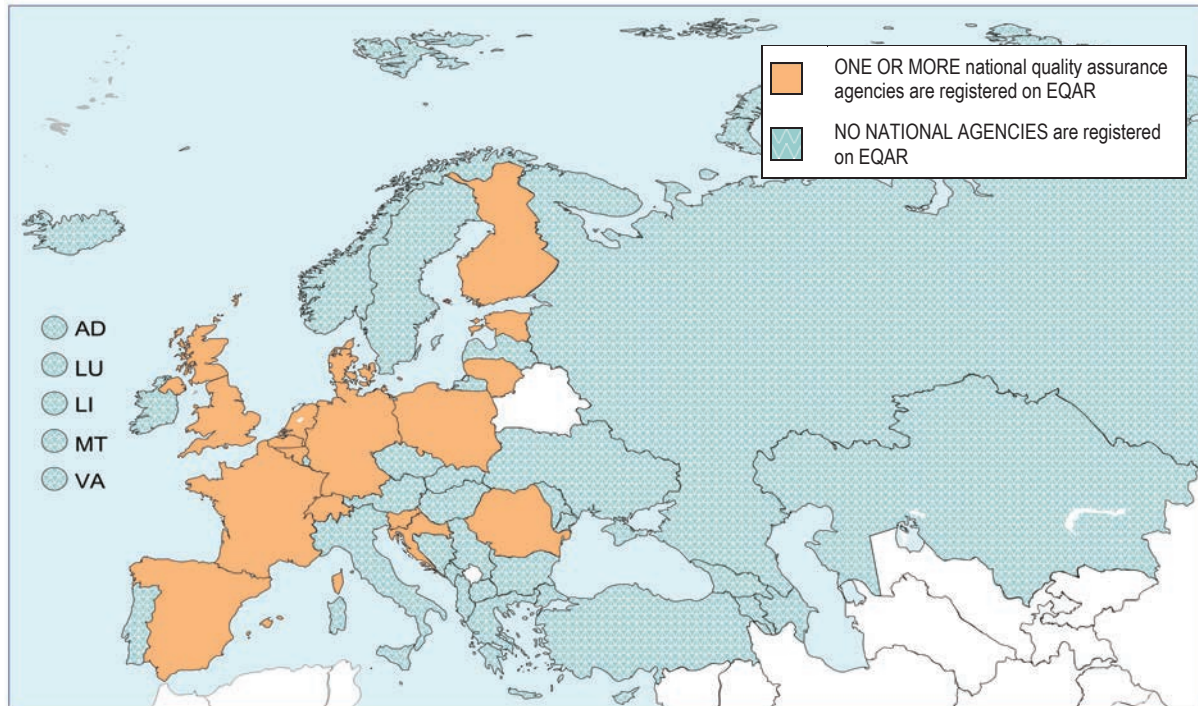
3.2.4. European Higher Education Area impact on developments in quality assurance

The European Higher Education Area has been a catalyst to the development of national quality assurance systems. When the ESG were adopted in 2005, this gave a boost to European cooperation, and two organisations in particular play a strong role in ensuring that external quality assurance agencies work in accordance with the ESG. The European Association for Quality Assurance in higher education (ENQA), established in 2000 as a network and transformed into an association in 2004, provides a thriving forum for cooperation and engagement among quality assurance agencies, requiring its members to adhere to the ESG, and promoting the exchange of good practice between agencies.

The European Quality Assurance Register for Higher Education (EQAR) is the first organisation created in the context of the Bologna Process. It was established in 2008, following an agreement of

the Ministers responsible for higher education in the London Communiqué, to provide reliable information on credible quality assurance agencies operating in Europe, and thus supporting trust in quality assurance agencies wishing to work across national borders in the EHEA. The essential condition to be listed on the Register is for the agency to have been evaluated and proved to operate in compliance with the ESG. In September 2014, 32 agencies in 15 countries were listed on the Register. The countries where at least one agency is listed in EQAR are Belgium, Croatia, Denmark, Estonia, Finland, France, Germany, Lithuania, the Netherlands, Norway, Poland, Romania, Slovenia, Spain and the United Kingdom, with those from Estonia, Lithuania, Slovenia and the United Kingdom being new arrivals. This shows an increase (from 13 – 15 countries) since January 2012.

Figure 3.5: Quality Assurance Agencies registered on EQAR, 2013/14



Source: BFUG questionnaire

Figure 3.6 gives evidence of where public authorities encourage their own national quality assurance agencies to become members of ENQA and to register with EQAR. ENQA provides support to national agencies in strengthening their adherence to the ESG through promoting European co-operation and disseminating information and expertise among its members. EQAR manages the list of agencies that comply substantially with the ESG. The fact that the same number of systems (22) encourage EQAR registration and ENQA membership reflects the complementary roles – developmental for ENQA and accountability-driven for EQAR - of the two organisations.

Legend:

- Legislation encourages national quality assurance agencies **to register with EQAR**
- Legislation encourages national quality assurance agencies **to become a member of ENQA**
- Legislation/steering documents **do not encourage** national quality assurance agencies to register with EQAR or become a member of ENQA
- Not applicable
- Not available

Country Legend:

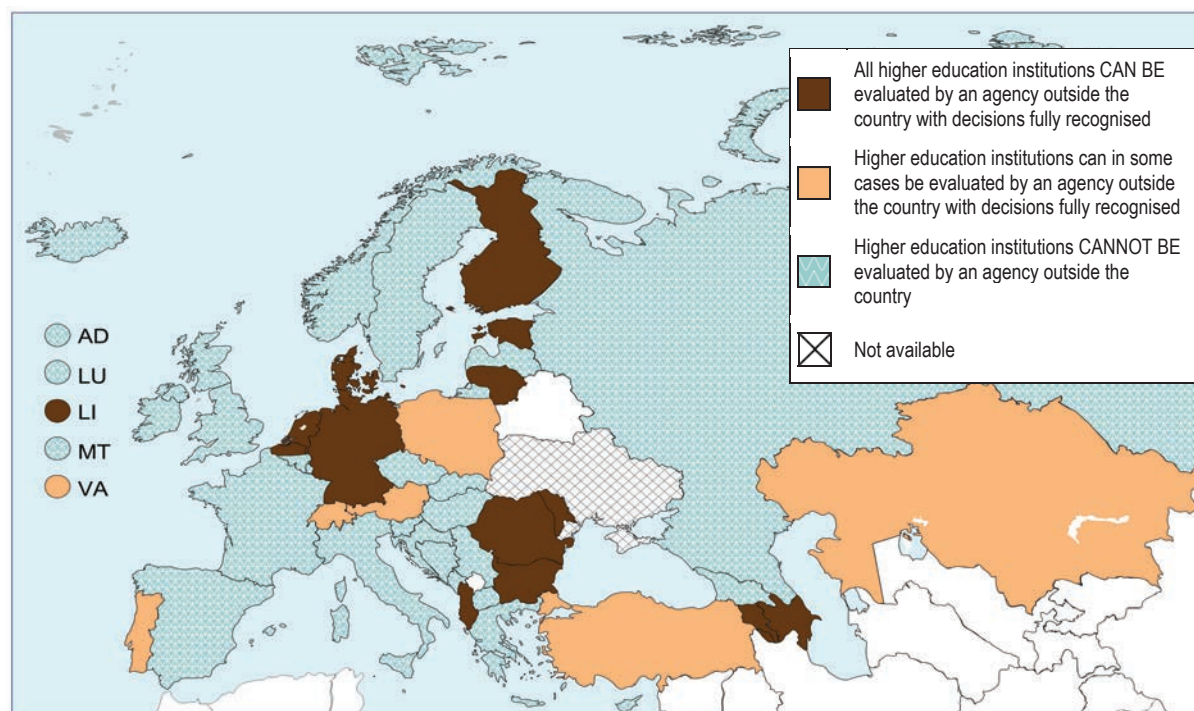
- AD
- LU
- LI
- MT
- VA

3.2.5. Ability of higher education institutions to be evaluated by non-national agencies

However, there is clearly a need for sufficient safeguards to ensure that the public responsibility for quality assurance is maintained. National responsibility for quality assurance could be perceived to be challenged by cross-border quality assurance, and some countries are therefore hesitant to recognise reviews from non-national agencies, perhaps particularly in systems where the main outcome of quality assurance is a decision granting permission to institutions or programmes to operate. The issue may also perhaps be perceived differently by bigger and smaller higher education systems.

The question of whether higher education institutions are able to undertake an evaluation by an agency outside the country implies that the results of the review are recognised as part of the national requirements for external quality assurance – for example, initial or periodic accreditation of programmes, institutional audit or institutional evaluation. The picture illustrated in Figure 3.7 shows that progress is, however, slow. 14 national systems claim that all their higher education institutions are free to be evaluated by foreign national agencies.

Figure 3.7: Ability for higher education institutions to be evaluated by an agency outside the country, with decisions fully recognised 2013/14



Source: BFUG questionnaire

Among these countries, there may be differences in the manner in which formal quality assurance or accreditation decisions are taken. Thus in Estonia, Finland, the Netherlands and Portugal, for example, while evaluations of other agencies are treated in the same way as those of a national agency, formal accreditation decisions remain the preserve of the national quality assurance agency.

In other countries, it may be possible for certain types of higher education institution only to work with a foreign quality assurance agency. In Austria, it is only public universities that may take advantage of this possibility, while in Switzerland it is only the universities of applied sciences and not universities (although the Swiss quality assurance agency responsible for universities is also able to work in other countries). In Germany, higher education institutions can choose agencies (including foreign agencies) that are accredited by the German Accreditation Council for the periodic accreditation of their study programmes or internal quality assurance systems. For joint programmes (of a German and at least one foreign institution), recognised agencies can ratify individual accreditation decisions by other agencies if they are registered in EQAR or are a full member of ENQA.

The Czech Republic, Croatia, Moldova and Spain point out that institutions are able to go through evaluation processes with other agencies, and may do so to gain prestige. However, this is only possible if the higher education institutions are first accredited by the national system. As this is more a duplication of efforts rather than evidence of opening up to cooperation in quality assurance across borders, these countries are shown in the map alongside those that are unable to be evaluated abroad.

Some higher education systems also point out that, even if their higher education institutions are unable to choose to be evaluated from an agency outside the country, they are free to seek accreditation for particular study fields by international accrediting organisations. There are also increasing examples of cooperation between national quality assurance agencies in evaluating higher education institutions and/or particular programmes.

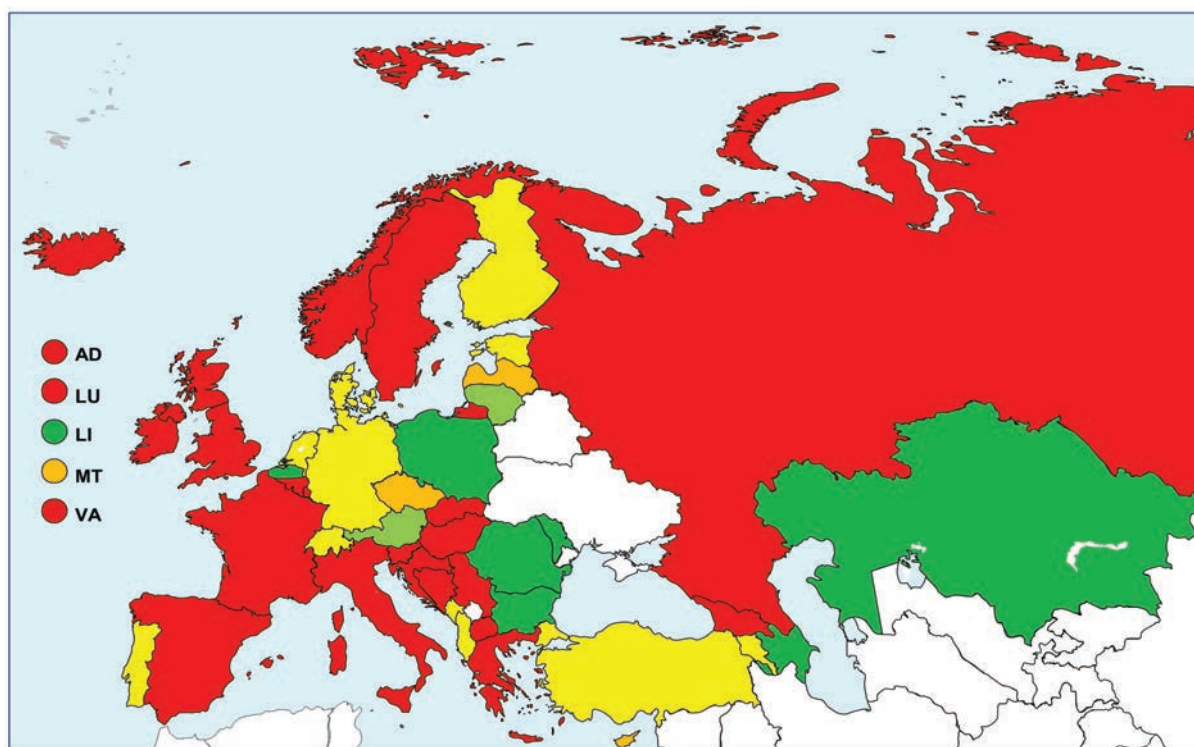
The project Recognising International Quality Assurance Activity in the European Higher Education Area (RIQAA)² has provided evidence that cross-border activity of national quality assurance agencies is growing significantly. It is therefore noteworthy that, despite the number of cross-border evaluations increasing within the EHEA, major developments in opening up national systems have not taken place since 2012. The countries that were willing to enable their higher education institutions to undertake evaluations with a foreign agency mostly decided to do so prior to 2012. In the case of Poland, legislation came into force in October 2011 providing a basis for higher education institutions to be evaluated by international agencies, and for the outcomes to be taken into consideration by the national quality assurance system. Armenia and Austria are the only examples of countries that have opened up this possibility to their higher education institutions since the Bucharest Communiqué in 2012. Around 75% of systems have not yet followed through on the Communiqué commitment to allow their institutions to be evaluated by EQAR registered agencies.

It is also important to recognise that, in the countries that allow higher education institutions to be evaluated by a foreign agency, many systems are not following strictly the requirement that foreign agencies should be listed by EQAR. A number of countries consider that other criteria, such as ENQA membership, are sufficient for the choice of a foreign agency. EQAR has been developed to ensure that the EHEA has a trustworthy mechanism showing which agencies are legitimate to operate in conformity with the ESG. The fact that there are a considerable number of countries which do not use EQAR registration to guide higher education institutions in their choice of agency is therefore a matter of concern.

Overall, the findings on the level of openness to cross border quality assurance activity have been represented in a new scorecard indicator that has been developed to monitor progress in relation to the Bucharest Communiqué commitment to "allow EQAR-registered agencies to perform their activities across the EHEA, while complying with national requirements." Despite this commitment 21 countries are in the situation whereby their institutions and programmes cannot be evaluated by quality assurance agencies from another country and no plans are being made to change this reality. Meanwhile only 8 systems ensure that the commitment is fully realised.

² *Recognising International Quality Assurance Activity (RIQAA) Final Report, December 2014.* Available at: https://eqar.eu/fileadmin/documents/eqar/riqaa/WP5_RIQAA_Report_final.pdf

Figure 3.8: Scorecard indicator (4): Level of openness to cross border quality assurance activity of EQAR registered agencies



Scorecard categories

- **All institutions and programmes** can choose to be evaluated by a foreign QA agency to fulfil their obligations for external QA, while complying with national requirements. EQAR registration serves as a criterion for agencies to be allowed to carry out cross-border evaluation/accreditation/audit.
- **In some cases, institutions and/or programmes** can choose to be evaluated by a foreign QA agency to fulfil their obligations for external QA, while complying with national requirements. EQAR registration serves as a criterion for agencies to be allowed to carry out cross-border evaluation/accreditation/audit.
- **In some or all cases, institutions and/or programmes** can choose to be evaluated by a foreign QA agency to fulfil their obligations for external QA, but **EQAR registration is not a criterion** used to determine which agencies are allowed to carry out such cross-border evaluation/accreditation/audit.
- Discussions are ongoing or plans have been made to establish a legal framework allowing EQAR-registered agencies to operate in the country.
- Institutions and programmes cannot be evaluated by QA agencies from outside the country to fulfil their obligations for external QA, and no plans are being discussed.

3.2.6. Evaluating national systems against ESG

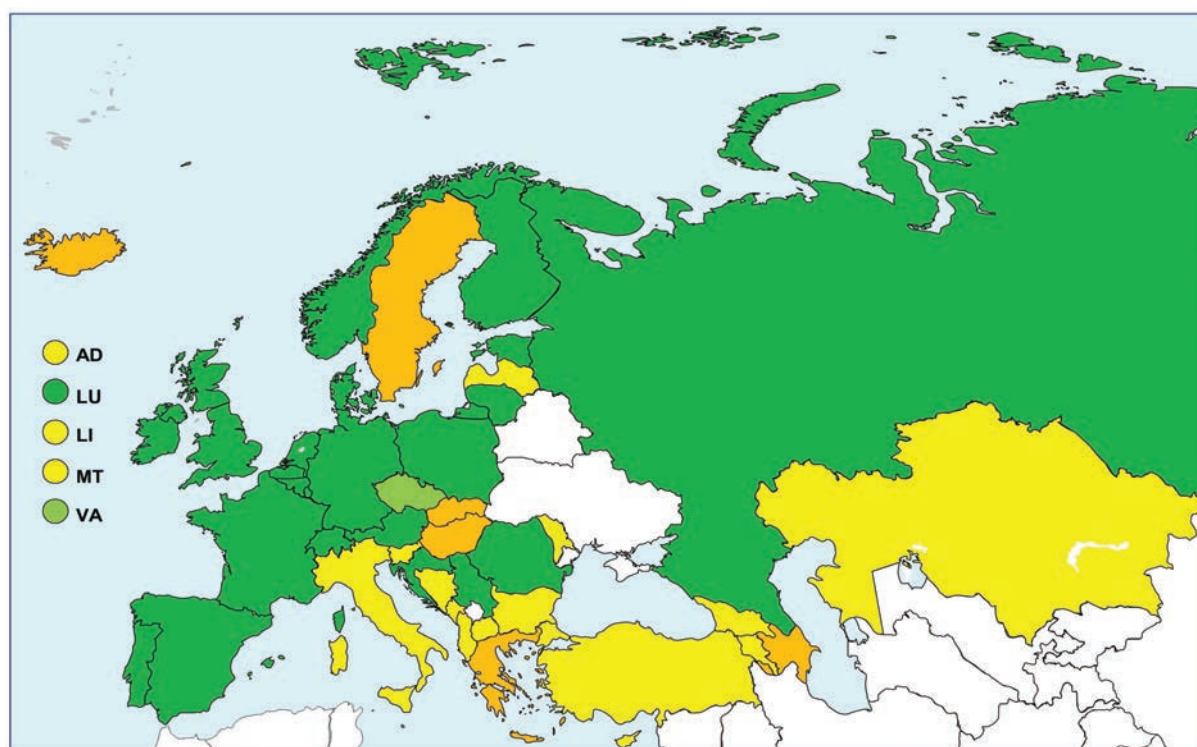
The European Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) were adopted in 2005 by the ministers in Bergen (Norway). The standards and guidelines are designed to be applicable to all higher education institutions and quality assurance agencies in Europe, irrespective of their structure, function and size, and the national system in which they are located. The ESG do not include detailed "procedures" since institutional and agency procedures are an important part of their autonomy. Rather the ESG "recognise the primacy of national systems of

higher education, the importance of institutional and agency autonomy within those national systems, and the particular requirements of different academic subjects" (ENQA 2005, p. 13).

A revised version of the ESG has been developed for adoption at the Yerevan Ministerial conference, but for the period covered by this report, the first version of the ESG should be implemented. The following principles outlined in the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) stress that quality assurance should focus on:

- the interests of students as well as employers and the society more generally in good quality higher education;
- the central importance of institutional autonomy, tempered by a recognition that this brings with it heavy responsibilities;
- the need for external quality assurance to be fit for its purpose and to place only an appropriate and necessary burden on institutions for the achievement of its objectives.

Figure 3.9: Scorecard Indicator (5): Stage of development of external quality assurance system 2013/14



Scorecard categories

- A fully functioning quality assurance system is in operation nationwide. The QA agency/ies has/have been successfully evaluated against the European Standards and Guidelines in the EHEA. The QA system applies to all institutions and/or programmes and covers the following main issues:
 - teaching
 - student support services
 - internal quality assurance/management system
- A fully functioning quality assurance system is in operation nationwide. The QA agency/ies has/have been successfully evaluated against the European Standards and Guidelines in the EHEA. The QA system applies to all institutions and/or programmes and covers a subset of the main issues.

- A quality assurance system is in operation nationwide. The QA system has not been evaluated against the European Standards and Guidelines in the EHEA. The QA system applies to all institutions and/or programmes and covers teaching, student support services and internal quality assurance/management.

OR

A quality assurance system is in operation at the national level. The QA system has been successfully evaluated against the European Standards and Guidelines in the EHEA. The QA system applies to some institutions and/or programmes and covers subset of the main issues.

- A quality assurance system is in operation nationwide. The QA system has not been evaluated against the European Standards and Guidelines in the EHEA. The QA system applies to all institutions and/or programmes and covers a subset of the main issues.
- A quality assurance system is in operation nationwide. The QA system has not been evaluated against the European Standards and Guidelines in the EHEA. The QA system applies to some institutions and/or programmes and covers a subset of the main issues.

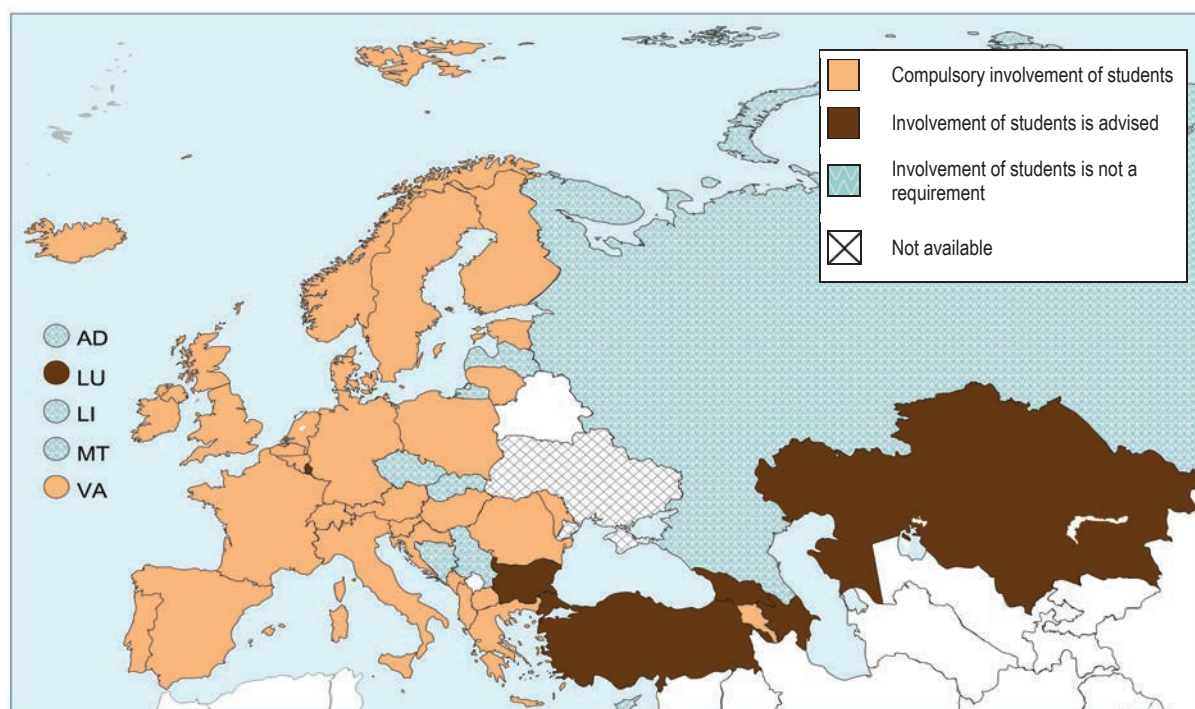
Scorecard indicator 5 focuses on the development of external quality assurance systems. It contains elements that assess how comprehensive the system is (applying to all institutions or only some) and examines a range of key issues covered by the quality assurance system (teaching, student support services, internal quality assurance/management system). It also considers whether agencies have been evaluated against the ESG.

At first glance, the indicator provides a positive picture: Nearly half of the EHEA countries (23) are now in the dark green category, with 5 countries having moved from the light to dark green category since 2010/11. However, when looking at the yellow and orange categories the situation has not progressed. Seventeen systems were in the yellow category in 2010/11 and seventeen systems are there in 2013/14, while for the orange category it is also the same number of systems – six - as in 2010/11.

Several countries have experienced recent evaluations of their agencies for ENQA membership with the outcomes indicating that there are issues to address to ensure compliance with the ESG. This is the case for agencies in Bulgaria, Hungary and Sweden. Agencies in a number of other countries have not yet been reviewed successfully against the ESG – for ENQA membership or registration on EQAR. This is the case for agencies in Armenia, Bosnia and Herzegovina, Georgia, Greece, Iceland, Italy, Kazakhstan, Malta, Moldova and Turkey.

Overall these findings suggest that progress taking place more rapidly in the better developed quality assurance systems, while there may be a tendency to stagnate in less developed systems.

Figure 3.10: Involvement of students in quality assurance governance bodies, 2013/14



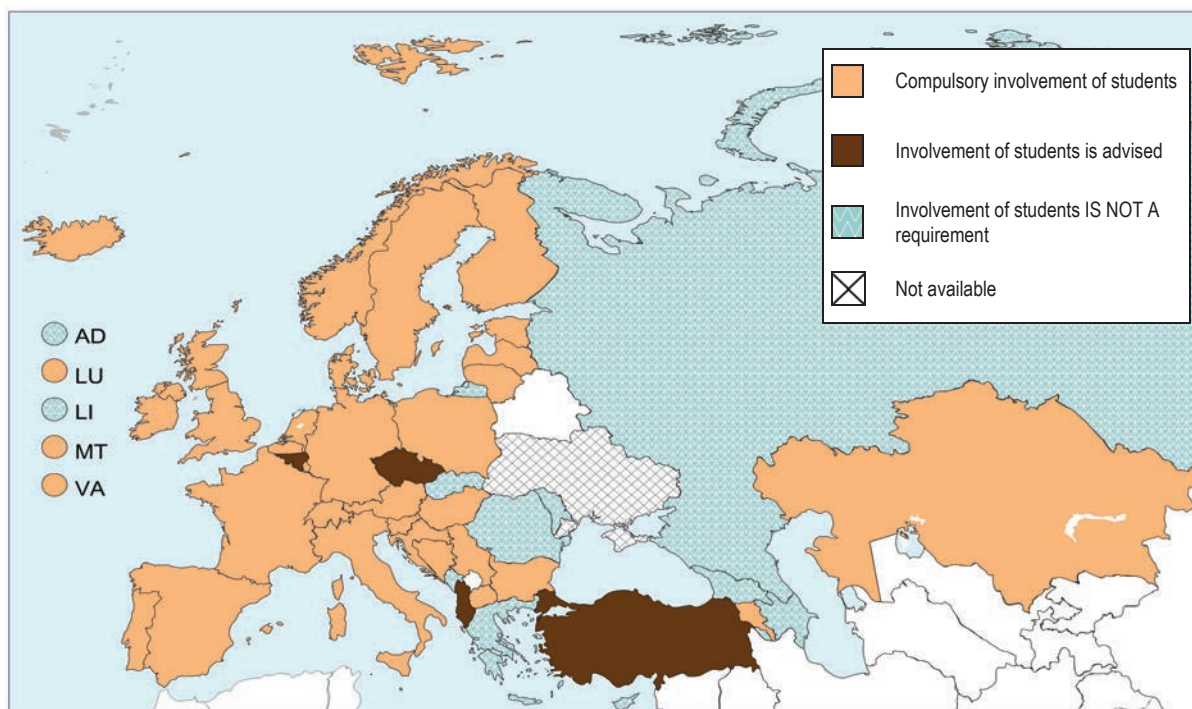
Source: BFUG questionnaire

One of the noticeable features of the development of quality assurance systems in Europe has been the increasing recognition of the importance of stakeholder participation, and in particular the importance of the role played by students as the key stakeholder group in higher education. The Bologna texts recognise that students should be fully engaged in the improvement and enhancement of higher education and of their own learning experiences. The form of this engagement should be wide-ranging, involving students in all aspects of quality assurance systems.

Figure 3.9 focuses on student participation in governance structures, distinguishing between required involvement, optional (advised) involvement, and no requirement for students to be involved. It is interesting to note that student involvement is a formal requirement in 31 systems, while there is no requirement in only 11 systems.

Figure 3.11 considers student participation in external review teams, again distinguishing between required involvement, optional (advised) involvement, and no requirement for students to be involved. There is a strong overlap with the information in Figure 3.10, demonstrating the likelihood that where student involvement has established itself as the norm, this will be reflected in all key processes and issues regarding quality assurance.

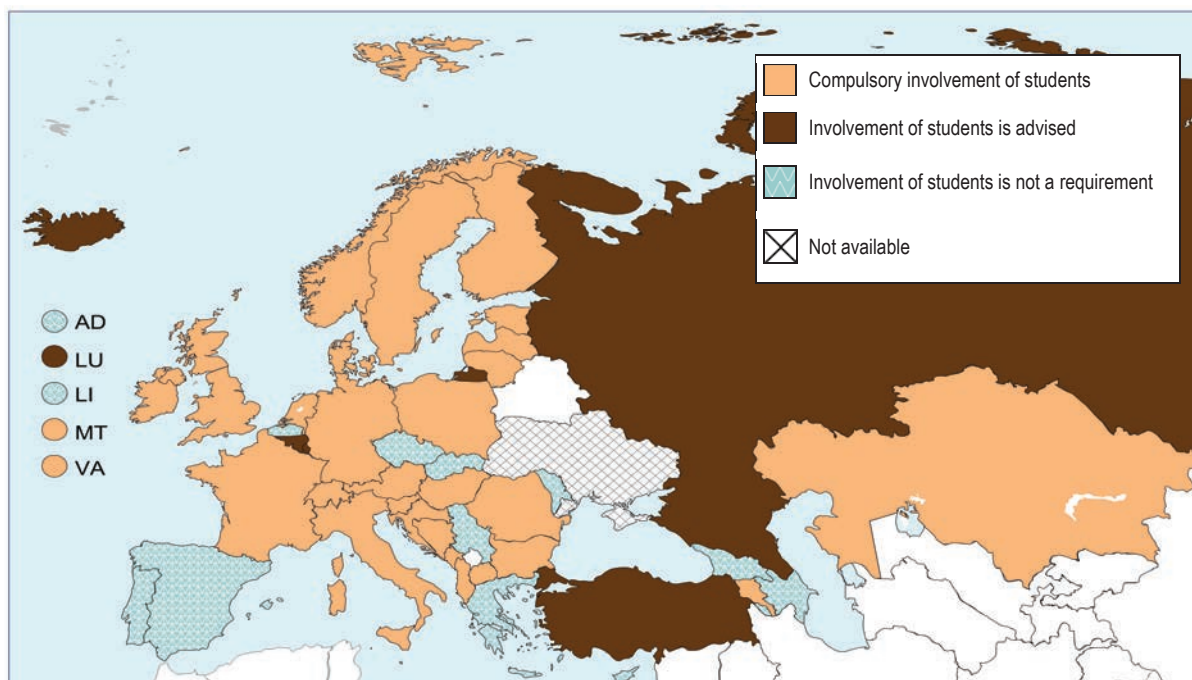
Figure 3.11: Involvement of students in external review teams, 2013/14



Source: BFUG questionnaire

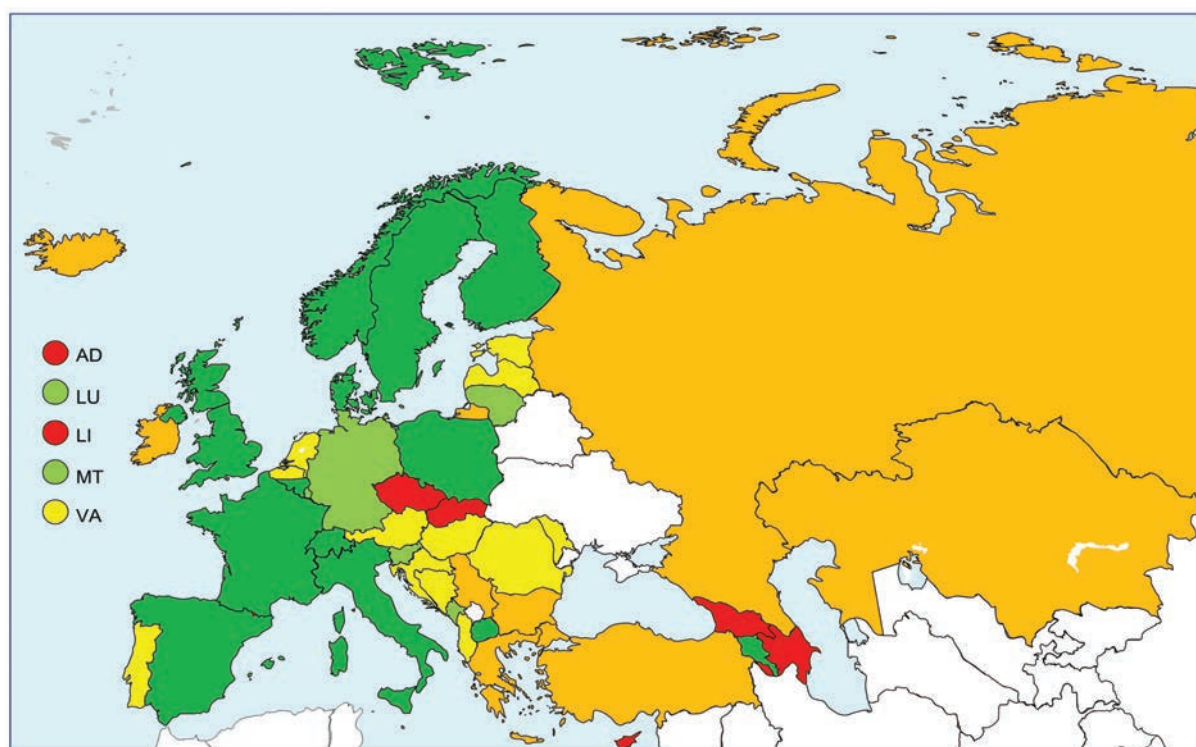
This assumption, however, does not hold for all situations, and Figure 3.12 on the involvement of students in decision-making processes provides some nuance. This map still shows a considerable number of systems (28) where student involvement is compulsory. Moreover, in some countries, such as Belgium (French Community) the involvement of students is common practice although not legally required. However, in general there is a tendency for countries to be more reluctant in involving students in the process of decision-making. One interesting exception to this rule is Russia, where student involvement in decision-making is advised despite the fact that there is no required student involvement in other aspects of external quality assurance.

Figure 3.12: Involvement of students in decision-making processes for external reviews, 2013/14



Source: BFUG questionnaire

Figure 3.13: Scorecard Indicator (6): Level of student participation in external quality assurance system 2013/14



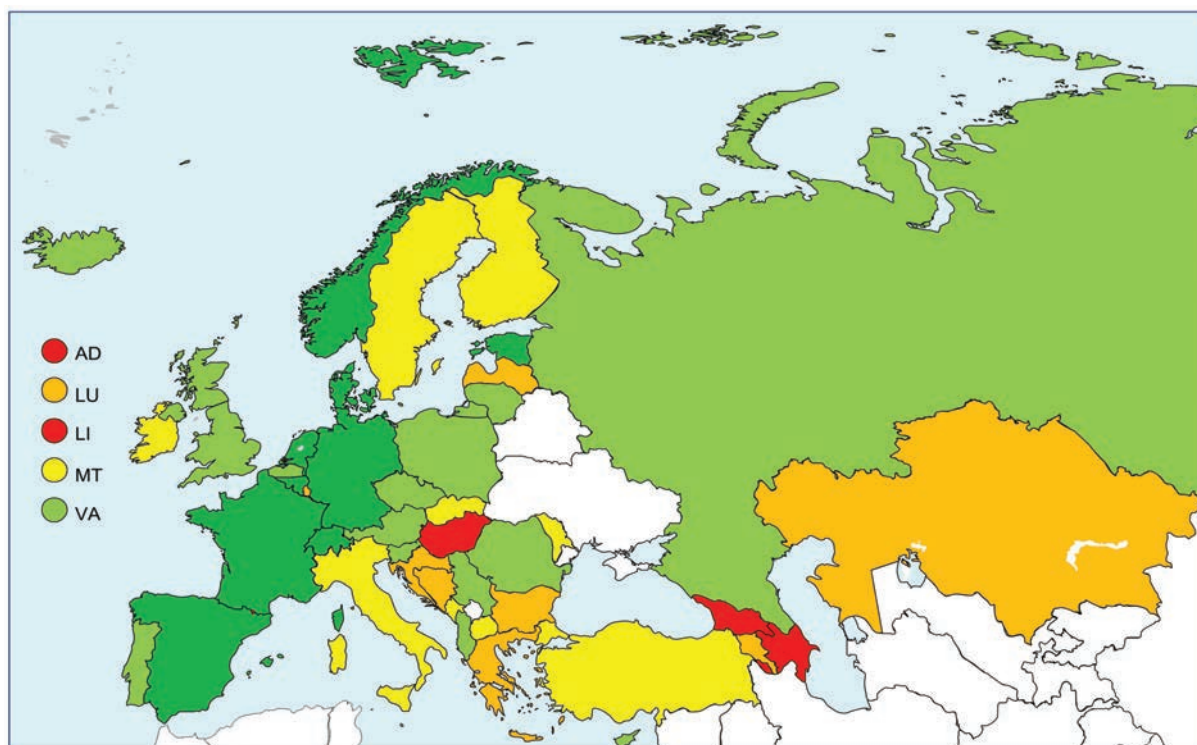
Scorecard categories

- In all quality assurance reviews, students participate at five levels:
 - in governance structures of national quality assurance agencies
 - as full members or observers in external review teams
 - in the preparation of self-evaluation reports
 - in the decision making process for external reviews
 - in follow-up procedures
- Students participate at four of the five levels mentioned above
- Students participate at three of the five levels mentioned above
- Students participate at two of the five levels mentioned above
- Students cannot participate or participate at only one level mentioned above

Scorecard indicator 5 provides an overview of the situation regarding student participation. From the evidence reported by countries, the situation is not improving. In 2012 11 countries appeared in the dark green category, indicating that student participation is standard practice in all main aspects of external quality assurance processes. This number has now decreased to ten. More significantly the number of countries in the light green category has dropped from 11 to six, while the yellow category now has 14 countries compared to 13 in 2012. Ten countries are now in the orange category, a doubling from the 5 in 2012, while 6 countries appear in red, compared to 7 in 2012.

Overall, this indicator shows that the EHEA is far from the point where it can present student participation in quality assurance as standard and common practice. While progress in this area has been made in the past, it may well be that in reorganising quality assurance systems, some countries have not taken sufficient care to ensure that students continue to be properly involved.

Figure 3.14: Scorecard Indicator (7): Level of international participation in external quality assurance 2013/14



Scorecard categories

- In all cases the following four aspects are met:
 - agencies are full members of ENQA and/or listed on EQAR
 - international peers/expert participate in governance of national QA bodies
 - international peers/experts participate as members/observers in evaluation teams
 - international peers/experts participate in follow-up procedures
- Three of the four aspects are met
- Two of the four aspects are met
- One of the four aspects is met
- No international participation

Scorecard indicator 7 on the level of international participation in external quality assurance provides further evidence that the process of internationalisation is having an impact in quality assurance systems. Listing on EQAR and membership of ENQA are both developing strongly while it is increasingly the norm to involve international experts in national quality assurance processes. These developments explain the clear and steady progress that is evident in comparing the indicator with its counterpart in the 2012 Implementation Report.

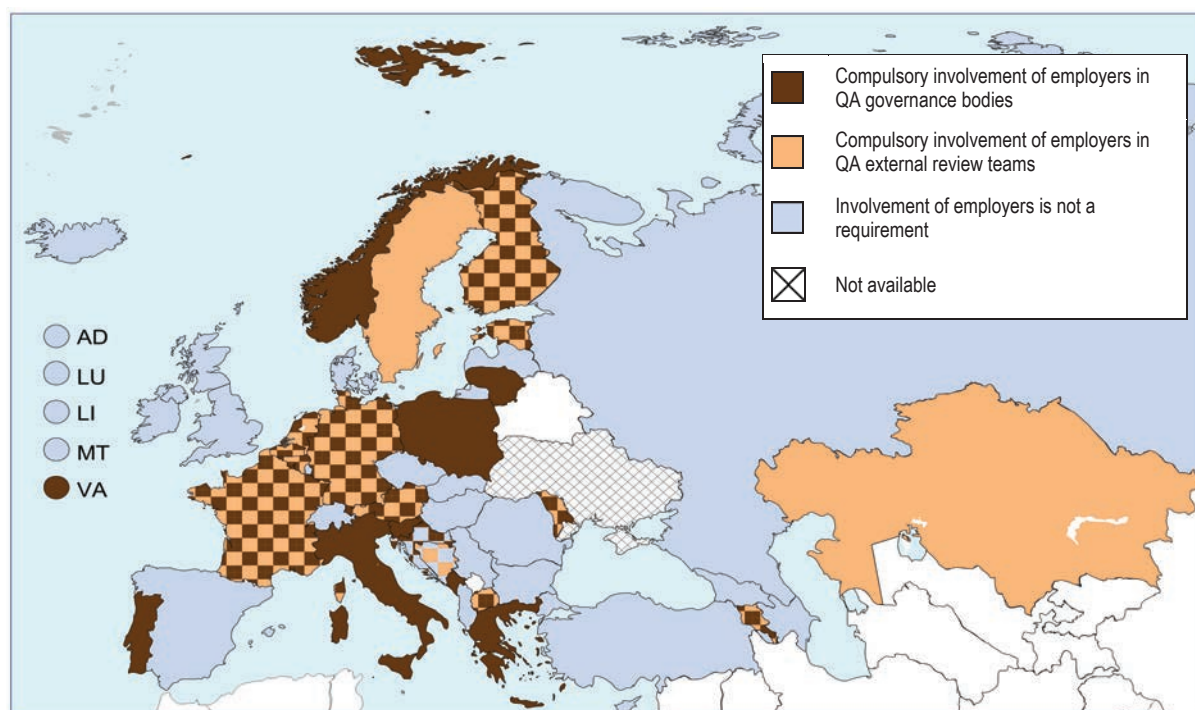
At that time, eight countries appeared in the highest (dark green) category. This has now moved up to nine countries, while progress in the light green category is more substantial: 15 countries now appear compared to 11 in 2012. 11 countries are now in the yellow category – an increase of one from 2012. This means that only 14 countries are left in the bottom two categories, and only 5 of these are in the red category indicating no international participation. This is an improvement from the 7 countries that were there in 2012.

It is also interesting to note that the development of international participation in quality assurance appears to be moving most strongly in central and eastern European countries.

3.2.7. Involvement of employers in Quality Assurance

The Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) specify that quality assurance of programmes and awards are expected to include "regular feedback from employers, labour market representatives and other relevant organisations".

Figure 3.15: Required involvement of employers in quality assurance governance bodies and external review teams, 2013/14



Source: BFUG questionnaire

The findings shown in figure 3.14 indicate that employer involvement has become a feature of quality assurance in many systems. However there have been few developments since 2012. Indeed 25 countries state that there is a formal requirement for involvement of employers – whether in governance bodies, external review teams or both. In some countries, while employer involvement may not be compulsory, nevertheless the labour market concerns are reflected in the quality assurance system design. For example, in Denmark the Quality Assurance governing body is required to have insight into the labour market, and therefore includes representatives with knowledge of the labour market situation – although these are not necessarily employers.

Conclusions

This report provides strong evidence that quality assurance continues to be an area of dynamic evolution that has been spurred on through the Bologna process and the development of the EHEA.

While information on internal quality assurance is necessarily limited, the findings indicate that the trend for higher education institutions to develop their own strategies for quality enhancement is spreading and increasing. Equally the public accountability and transparency requirements in quality assurance systems are evolving, with a significant increase in the number of countries reporting that all institutions publish the outcomes of quality assurance evaluations, even when negative.

External quality assurance systems are now practically ubiquitous in the EHEA – a reality that is far different to when the Bologna process was launched. The main issue is no longer whether or not a quality assurance system has been established, but rather whether the system is producing effective results and working in compliance with the European Standards and Guidelines.

In this respect there is still progress to be made, particularly regarding student participation in quality assurance. This is one of the few areas under scrutiny where it is difficult to find evidence of recent positive change. Indeed, it appears that some gains with regard to comprehensive student involvement in quality assurance systems may be slipping back as systems are reformed and reorganised.

While national quality assurance systems can still be differentiated by their tendency to be more accreditation oriented or focused more on quality enhancement, there is an increasing consensus on the issues examined by quality assurance agencies. All systems now focus on teaching, and some form of quality assurance system is usually in place for research. The majority of systems also consider issues such as internal management and the organisation of student services. There are also examples of quality assurance systems becoming more tailor-made and adapted for areas of specialisation in higher education and shifting focus to topics such as internationalisation and entrepreneurship whose relevance is increasing.

One of the major trends and commitments made in the context of the Bologna process is to open up the possibility for higher education institutions to be evaluated by foreign agencies, provided that these are working in full conformity with the European Standards and Guidelines. While there is evidence that higher education institutions are increasingly taking advantage of opportunities to work with agencies from other countries, national reforms in this area are slow-moving. Indeed since the renewed commitments made in the Bucharest Communiqué, only two countries – adding to 10 where this was already possible - have followed up with significant legislative reform enabling higher education institutions to work with EQAR-registered quality assurance agencies.

CHAPTER 4: SOCIAL DIMENSION IN HIGHER EDUCATION

The Bucharest Communiqué

With the Bucharest Communiqué (2012), ministers reaffirmed their commitment to the social dimension in higher education and thus to working towards the goal that '[t]he student body entering and graduating from higher education institutions should reflect the diversity of Europe's populations' ⁽¹⁾. This goal had been formulated for the first time at the London summit of 2007, where ministers had also stressed 'the importance of students being able to complete their studies without obstacles related to their social and economic background' ⁽²⁾, after the social dimension had entered the Bologna Process with the Prague Communiqué in 2001 and gained importance in subsequent years.

To further this goal, ministers at their meeting in Bucharest in 2012 agreed 'to adopt national measures for widening overall access to quality higher education' and to 'work to raise completion rates and ensure timely progression in higher education in all EHEA countries' ⁽³⁾. More specifically, they agreed to 'step up [their] efforts towards underrepresented groups to develop the social dimension of higher education, reduce inequalities and provide adequate student support services, counselling and guidance, flexible learning paths and alternative access routes, including recognition of prior learning' ⁽⁴⁾. They also encouraged peer learning on the social dimension ⁽⁵⁾ and endeavoured 'to monitor progress in this area' ⁽⁶⁾. The present report is an important contribution to this monitoring.

The 2012 Bologna Implementation Report

As the previous Bologna Process Implementation Report showed, the goal of providing equal opportunities to quality higher education had not yet been reached (European Commission/ EACEA/Eurydice, Eurostat and Eurostudent 2012, pp. 71-101).

By way of conclusion, the report raised the question whether countries gave sufficient priority to addressing underrepresentation of particular societal groups in higher education (Ibid., p. 101) and stressed the need to strengthen the link between data gathering (monitoring) and policy development in most EHEA countries (Ibid., p. 82). One issue highlighted in particular for further analysis was the impact of the implementation of national qualifications frameworks on alternative entry routes (Ibid., p. 88). Alternative access to higher education in turn was to be regarded as 'a key component of debates relating to the social dimension in higher education' (Ibid, p. 87).

⁽¹⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 1.

⁽²⁾ London Communiqué: Towards the European Higher Education Area: responding to challenges in a globalised world, 18 May 2007, p. 5.

⁽³⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 1.

⁽⁴⁾ Ibid., pp.1-2.

⁽⁵⁾ This was taken up by the PL4SD (peer learning for the social dimension) project, which seeks to support policy-makers and practitioners in developing effective measures for improving the social dimension of the EHEA (see <http://www.pl4sd.eu/>).

⁽⁶⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 2..

Chapter outline

The purpose of this chapter is to present the situation three years on, reviewing which developments related to the social dimension have continued and which changes and new developments have occurred in the meantime. The first section presents statistical information on the impact of a number of factors (gender, country of birth, parental education) on higher education participation and attainment. Against this background, the second section examines if and how the social dimension goal is reflected in national higher education policies across the EHEA. The chapter then looks at the extent to which alternative access routes to higher education are made available, focusing in particular on the question of recognition of prior learning (also for the purposes of progression in higher education). The closely-related questions of higher education completion and drop-out as well as the provision of student services connected to employability will be discussed in chapter 6. The final section of the social dimension chapter focuses on financial obstacles to participation in higher education and measures in place to address those obstacles.

4.1. Statistical information on the impact of students' background on their participation in and attainment of tertiary education

Central to the social dimension of the Bologna Process is the aim that the student body should reflect the diversity of the populations and that the background of students should not have an impact on their participation in and attainment of higher education. Given the diversity across the EHEA, it is left to each country to decide which characteristics to take into account when comparing the composition of the student body with the total population. Which groups of society are then identified as underrepresented in higher education also differs between countries.

The BFUG questionnaire specifically mentioned students with disabilities; mature students; students from lower socio-economic background; male/female students; ethnic, cultural, religious or linguistic minorities; students living in specific geographical areas; migrants and migrants' children. Which of those groups are identified (and monitored) as underrepresented by different countries and targeted by national policies will be examined in section 4.2.

This section is based on statistical data provided by Eurostat, which allows to analyse the impact of gender, country of birth (as proxy of immigration), and the educational background of students' parents on their participation in and/or attainment of tertiary education.

4.1.1. Gender balance in higher education

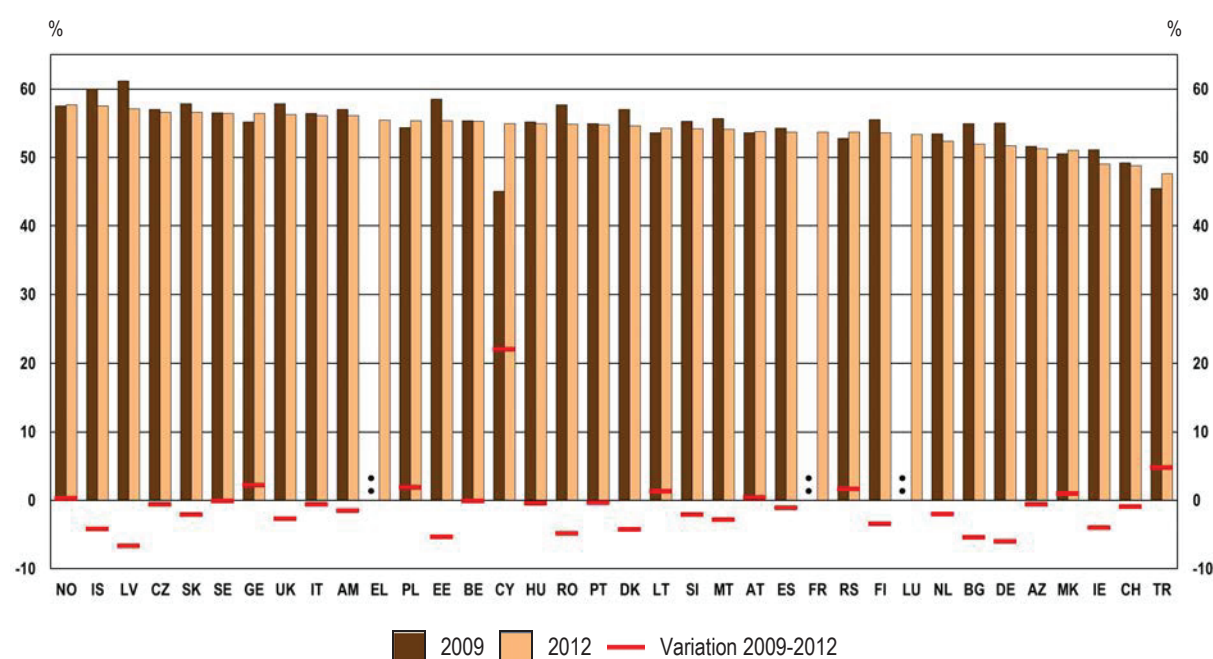
Equal opportunities for men and women to attain higher education are a main concern of the social dimension within the Bologna Process. This section on gender balance looks at the development of women's enrolment overall, by level of study and by field of study.

Figure 4.1 shows the share of women among new entrants in tertiary education in 2008/09 and three years later ⁽⁷⁾. In all countries except Cyprus, Turkey and Switzerland, the percentage of women entering tertiary education was above 50 % in 2008/09; Switzerland and "The former Yugoslav

(7) NB: This indicator does not refer to freshmen/women only but to all 'students who, during the course of the current reporting period, enter any programme leading to a recognised qualification at this level of education *for the first time*, irrespective of whether the students enter the programme at the beginning or at an advanced stage of the programme.' (UNESCO-UIS, OECD and Eurostat, 2013, p. 22) This means, the indicator collates students, who commenced any study programme on the ISCED level in question in the respective country for the first time, e.g. a Bachelor student on 5A level counts just like a student from abroad, who enrolls for a Master programme for the first time in the particular country.

Republic of Macedonia" had almost gender parity among new entrants, while in Iceland and Latvia 60 % or more of the newly enrolled students were female. Three years later, the situation looked very similar. Only Cyprus saw a steep increase (+22.04 %) in the share of women starting a study programme at tertiary education level between 2008/09 and 2011/12. A few other countries saw a further increase in the share of women, but to a much lesser degree: Turkey +4.78 %, Poland +1.88 %, and Lithuania +1.25 %. The share of women entering tertiary education decreased in 14 countries, by 4-7 % in eight of them, and by 2-3.5 % in six. Despite this decrease, 13 of the 14 countries still had more women than men entering tertiary education in 2011/2012. In Ireland, the share of women among new entrants dropped by 4 % from a slight overrepresentation in 2008/9 to a slight underrepresentation in 2011/2012. This might be linked to the Irish National Plan for Equity of Access to Higher Education (2008-2013) promoting lifelong learning, which attracted more men than women. In the remaining 10 countries for which data is available for both years, the gender distribution remained largely unchanged. As a result, in 2011/2012, in all countries, except for Ireland, Switzerland and Turkey, the majority of new entrants in tertiary education were female, with 19 countries having rates of around 55 % or higher. Overall, a trend towards convergence can be observed: In 2008/09, the gap in the shares of women entering tertiary education spanned from 45.5 % in Turkey to 61.2 % in Latvia; in 2011/12, this variation amounted to only ten percentage points, with Turkey having 47.6 % women among new entrants and Norway 57.7 %.

Figure 4.1: Percentage of women in new entrants in tertiary education in 2008/9 and 2011/12 and the variation in %



	NO	IS	LV	CZ	SK	SE	GE	UK	IT	AM	EL	PL	EE	BE	CY	HU	RO	PT
2009	57.5	60.0	61.2	57.0	57.9	56.5	55.2	57.8	56.5	57.0	:	54.4	58.5	55.3	45.1	55.2	57.7	55.0
2012	57.7	57.5	57.1	56.6	56.6	56.4	56.4	56.3	56.1	56.1	55.5	55.4	55.4	55.3	55.0	54.9	54.9	54.8
Variation 2009/12	0.3	-4.2	-6.7	-0.6	-2.2	-0.1	2.2	-2.7	-0.6	-1.6		1.9	-5.3	-0.1	22.0	-0.4	-4.9	-0.4
	DK	LT	SI	MT	AT	ES	FR	RS	FI	LU	NL	BG	DE	AZ	MK	IE	CH	TR
2009	57.1	53.6	55.3	55.7	53.6	54.3	:	52.8	55.5	:	53.5	54.9	55.0	51.6	50.6	51.1	49.2	45.5
2012	54.6	54.3	54.2	54.1	53.8	53.7	53.7	53.7	53.6	53.4	52.4	52.0	51.7	51.3	51.1	49.0	48.8	47.6
Variation 2009/12	-4.3	1.2	-2.1	-2.9	0.4	-1.1		1.6	-3.5		-2.0	-5.4	-6.0	-0.6	0.9	-4.0	-1.0	4.8

Notes:

Belgium, Ireland, Poland: excluding ISCED 6; **Germany, the Netherlands and Finland:** 2009 excluding ISCED 6; **Finland:** ISCED 5B not applicable; **Greece and Spain:** 2012 excluding ISCED 6; **France:** 2012 excluding ISCED 5B; **Romania:** 2012 ISCED 5B: not applicable; **Italy, Portugal:** 2012: ISCED 5B not significant; **Malta:** 2012: ISCED 6 not significant

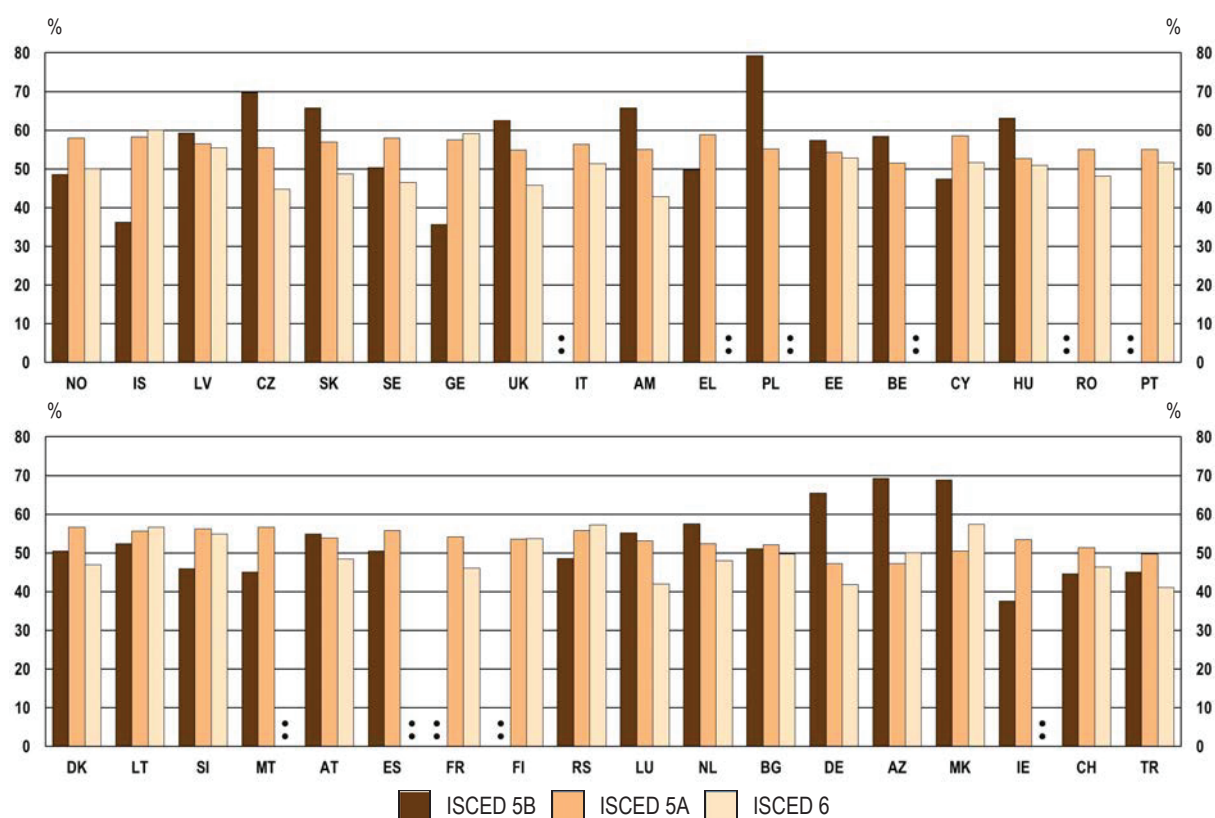
Source: Eurostat, UAE and additional collection for the other EHEA countries.

Besides this variation between countries, the share of women among new entrants in tertiary education also varies between levels of education. In the vast majority of countries (23 out of 30 for which data is available), the share of women entering higher education decreases when comparing ISCED 5A with ISCED 6. Still, given the overrepresentation at the level of ISCED 5A, in half of the countries (15), the share of women at the level of doctoral education is 50 % or more. In four countries (Norway, Hungary, Bulgaria, Azerbaijan), the shares of men and women entering at the level of doctoral education are more or less equal; men are underrepresented in 12 countries while women are underrepresented in 14.

At the level of ISCED 5A, men are underrepresented in almost all countries covered (32 out of 36). In "The former Yugoslav Republic of Macedonia" and Turkey, entry at ISCED-5A-level is more or less balanced between men and women. In two countries women are underrepresented, namely in Germany (47.2 %) and in Azerbaijan (also 47.2 %).

Taking into account a certain time lag, it may well be that many countries (after an increase at ISCED-5A-level) will see an increase in the participation of women in doctoral education in the coming years. Nevertheless, in the majority of countries, women are less likely to enter a third-cycle programme than their male counterparts. This imbalance to the disadvantage of women is the strongest in Turkey (41.1 %), Germany (41.8 %), Luxembourg (41.9 %) and Armenia (42.9 %). At the other end of the spectrum (with a significant overrepresentation of women in doctoral education) are Iceland (60 %), Georgia (59.1 %), "The former Yugoslav Republic of Macedonia" (57.3 %) and Serbia (57.2 %).

Figure 4.2: Percentage of women in new entrants in tertiary education by level of education, 2011/12



	NO	IS	LV	CZ	SK	SE	GE	UK	IT	AM	EL	PL	EE	BE	CY	HU	RO	PT
ISCED 5B	48.6	36.2	59.3	69.7	65.7	50.3	35.6	62.5	:	65.8	49.7	79.2	57.3	58.4	47.4	63.1	:	:
ISCED 5A	58.0	58.2	56.5	55.4	56.9	58.0	57.5	54.9	56.4	55.0	58.8	55.2	54.3	51.5	58.5	52.6	55.0	55.0
ISCED 6	50.0	60.0	55.4	44.7	48.7	46.5	59.1	45.8	51.4	42.9	:	:	52.8	:	51.7	50.9	48.1	51.6
Total	57.7	57.5	57.1	56.6	56.6	56.4	56.4	56.3	56.1	56.1	55.5	55.4	55.4	55.3	55.0	54.9	54.9	54.8
	DK	LT	SI	MT	AT	ES	FR	FI	RS	LU	NL	BG	DE	AZ	MK	IE	CH	TR
ISCED 5B	50.4	52.4	45.9	45.1	54.9	50.4	:	:	48.6	55.1	57.5	51.1	65.4	69.3	68.9	37.5	44.6	45.0
ISCED 5A	56.6	55.6	56.2	56.6	53.9	55.8	54.2	53.6	55.8	53.1	52.4	52.1	47.2	47.2	50.4	53.4	51.4	49.8
ISCED 6	46.9	56.7	54.9	:	48.4	:	46.0	53.7	57.2	41.9	48.0	49.8	41.8	50.1	57.3	:	46.3	41.1
Total	54.6	54.3	54.2	54.1	53.8	53.7	53.7	53.6	53.7	53.4	52.4	52.0	51.7	51.3	51.1	49.0	48.8	47.6

Notes:

Belgium, Greece, Spain, Ireland and Poland: total: excluding ISCED 6; **Finland, Romania:** ISCED 5B not applicable; **France:** total excluding ISCED 5B; **Italy, Portugal:** ISCED 5B not significant; **Malta:** ISCED 6 not significant.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

The differences between levels are partly related to differences between study fields – at which level they are commonly studied and whether they tend to attract more men or more women. Figure 4.3 shows very clearly that the share of women entering tertiary education varies quite strongly between different fields of study.

Figure 4.3 illustrates the share of women among new entrants in tertiary education by study field and level of education across countries⁽⁸⁾. In contrast to Figure 4.2, which uses the old ISCED classification, Figure 4.3 differentiates between Bachelor and Master programmes.

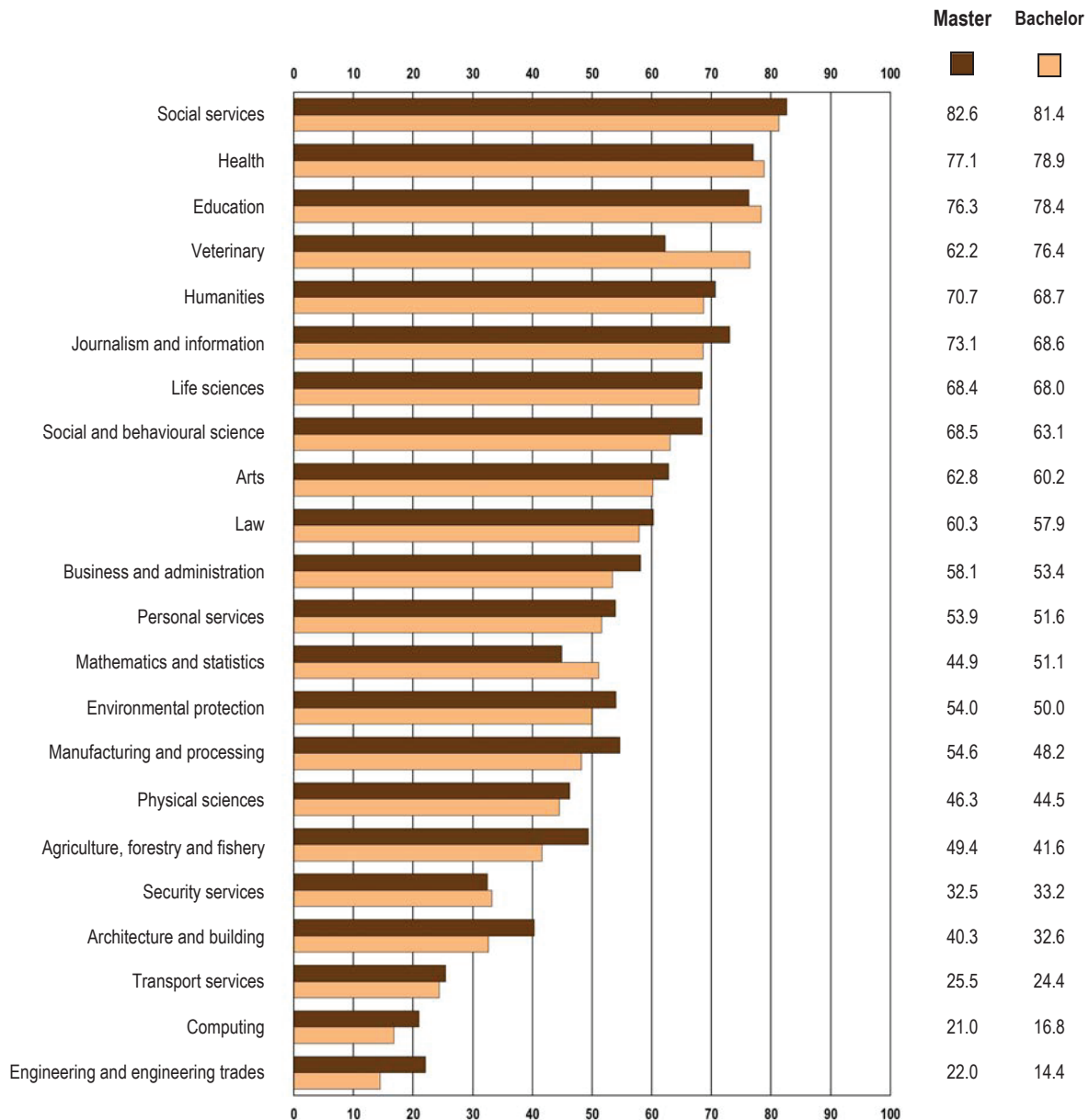
The strongest underrepresentation of women exists in the fields of engineering, computing, transport and security services as well as architecture and building, with less than a third of new entrants being female. On the other hand, in the fields of social services, health and education sciences, women are strongly overrepresented with the median of the proportion of women among new entrants being more than 70 %.

The results also confirm that with regard to gender equality in tertiary education, the level of education is less relevant than the field of study. In half of the fields, the difference between Bachelor and Master programmes amounts to 3 percentage points or less. Only in mathematics and statistics as well as in veterinary, the median share of women enrolled is substantially lower at Master level than at Bachelor level (18 % and 17 % respectively). In the field of veterinary studies, there is, however, a strong overrepresentation of women at both Bachelor and at Master level in most of the 13 countries for which data is available. In most of the remaining fields, the median share of women enrolled is higher at Master than at Bachelor level, especially in the fields of agriculture, forestry and fishery, architecture and building, computing as well as in engineering and engineering trades. In all four fields, the median share of female students at Bachelor level is below the average participation across fields of study (54.1 %).

National situations however may differ from the overall pattern. For instance, the percentage of women in 'engineering and engineering trades' programmes at Bachelor level is 27 % in Denmark and at Master level reaches 33 % in Denmark and 35 % in Iceland. In 'computing' programmes, the percentage of women is equal or above 30 % in Bulgaria (both at Bachelor and Master level), Cyprus (Bachelor level) and Estonia (Bachelor level).

⁽⁸⁾ It is important to note that country coverage varies across different fields (for details see the Glossary and methodological notes).

Figure 4.3: Median share of women in enrolled students in Bologna structures by field of education and level of Bologna structure (BA and MA), 2011/12



Notes:

The country coverage is the same for Bachelor and Master level within a given field but varies between different fields of study (see Glossary and methodological notes).

Source: Eurostat, UOE and additional collection for the other EHEA countries.

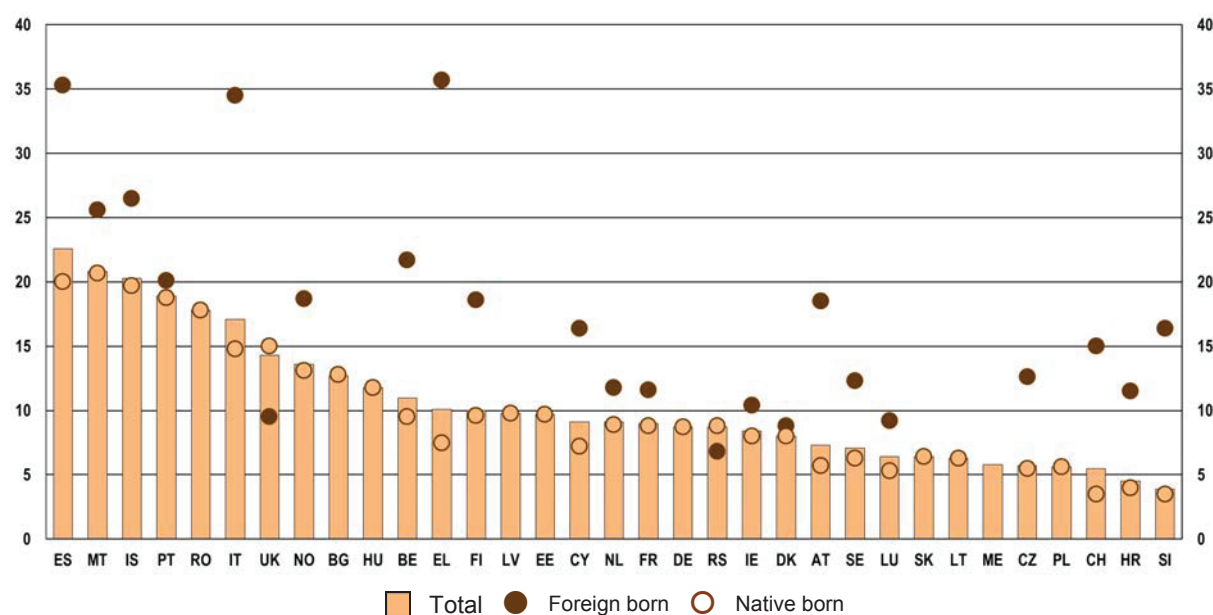
4.1.2. Participation and attainment of students with immigration background

Next to gender balance, another central concern of the social dimension is whether immigrants and children of immigrants have the same chances to participate in and attain higher education as native students. Gathering such information is, however, much more difficult. Eurostat data presented in this section uses the country of birth as criterion, which has a number of limitations. On the one hand, the group of foreign-born students also includes students who moved to the country just for the purposes of study (mobile students), a substantial group in a number of countries, as will be shown in chapter 7, with a participation rate of 100 %. On the other hand, a group that is of central concern to the social dimension is excluded, namely children of immigrants born in the country (often referred to as 'second

generation immigrants'). According to the latest Eurostudent report, the share of students belonging to this group of 'second generation immigrants' (defined as students born in the country with at least one parent born abroad) ranges from 0.4 % in Georgia to 22.5 % in Switzerland. In one third of the 27 countries covered by the Eurostudent report the share lies between 10 % and 22.5 %, in the remaining 17 countries it is below 10 %, in six of them around 2 % or less (Hauschildt et al. 2015, p.67). As the Eurostat data analysed in this section treats those students like native-born students, it is not possible to tell to what extent students belonging to this group of 'second generation immigrants' are underrepresented in tertiary education. Keeping these limitations in mind, data on foreign-born students can still be used as a rough measure to assess whether in this respect the composition of the student body corresponds to the composition of the total population.

Participation in higher education to a large extent depends on participation in earlier stages of education. As will be shown in section 4.3, to get access to higher education, completion of upper secondary education is required in most cases. Figure 4.4 shows the share of early leavers from education and training among young adults (18 to 24 years old) and depicts disparities between the foreign-born and the native-born population. The indicator relates the number of young women and men (18 to 24 years old) who were born abroad and who left the education system before completing upper secondary education to the total foreign-born population of the same age group (18 to 24). The indicator for the native-born population is calculated accordingly.

Figure 4.4: Early leavers from education and training as percentage of the population born abroad, native-born and the total population, 2013



	ES	MT	IS	PT	RO	IT	UK	NO	BG	HU	BE	EL	FI	LV	EE	CY	NL
Total	22.6	20.8	20.3	18.9	17.8	17.1	14.3	13.6	12.7	11.8	11	10.1	10	9.8	9.7	9.1	9.1
Foreign-born	35.3	25.6	26.5	20.1		34.5	9.5	18.7		:u	21.7	35.7	18.6	:u	:u	16.4	11.8
Native-born	20.0	20.7	19.7	18.8	17.8	14.8	15	13.1	12.8	11.8	9.5	7.5	9.6	9.8	9.7	7.2	8.9
	FR	DE	RS	IE	DK	AT	SE	LU	SK	LT	ME	CZ	PL	CH	HR	SI	
Total	9	8.7	8.7	8.4	8	7.3	7.1	6.4	6.4	6.3	5.81	5.7	5.6	5.5	4.5	3.9	
Foreign-born	11.6		6.8	10.4	8.8	18.5	12.3	9.2	:u			12.6	:u	15	11.5	16.4	
Native-born	8.8	8.7	8.8	8	8	5.7	6.3	5.3	6.4	6.3		5.5	5.6	3.5	4	3.5	

Notes:

'u': not reliable and not publishable and *italics*: not reliable. Data are sorted by Early leavers from education and training as percentage of the total population.

Source: Eurostat, Labour Force Survey (EU-LFS) and additional collection for the other EHEA countries.

As this indicator uses the total population aged 18-24 (foreign-born / native-born) as denominator, a country with a large proportion of international students scores lower (i.e. better) on the indicator for early leavers from education and training among the foreign-born population, since international students add to the total population but enter the education system at tertiary level and thus have no possibility to drop-out at a lower level. The results of Figure 4.4 therefore have to be interpreted with care and to be complemented with contextual information on the proportion of foreign students in the respective country, which varies greatly across the EHEA (see chapter 7, in particular Figures 7.14 and 7.18). As far as second-generation immigrants are concerned, the indicator does not reveal any information on their share among early leavers from education and training, as they are included in the group of native-born young adults.

Concerning the total share of young adults leaving education and training before completing upper secondary education, Figure 4.4 shows that two-thirds of the countries for which data is available have rates around or lower than 10 %, while large differences exist across the EHEA with rates ranging from 3.9 % in Slovenia to 22.6 % in Spain.

The highest shares of early leavers from education and training among native-born young adults are observed in Spain, Malta and Iceland. In those three countries, one out of five young women and men (18-24 years old) left the education system without a qualification at upper secondary level. In Portugal, Romania, the United Kingdom, Italy, Norway, Bulgaria and Hungary this share is between 10 and 20 % of the respective age group. The majority of countries (19 out of 33) have rates between 5 and 10 %, while only Croatia, Switzerland and Slovenia have rates below 5 %.

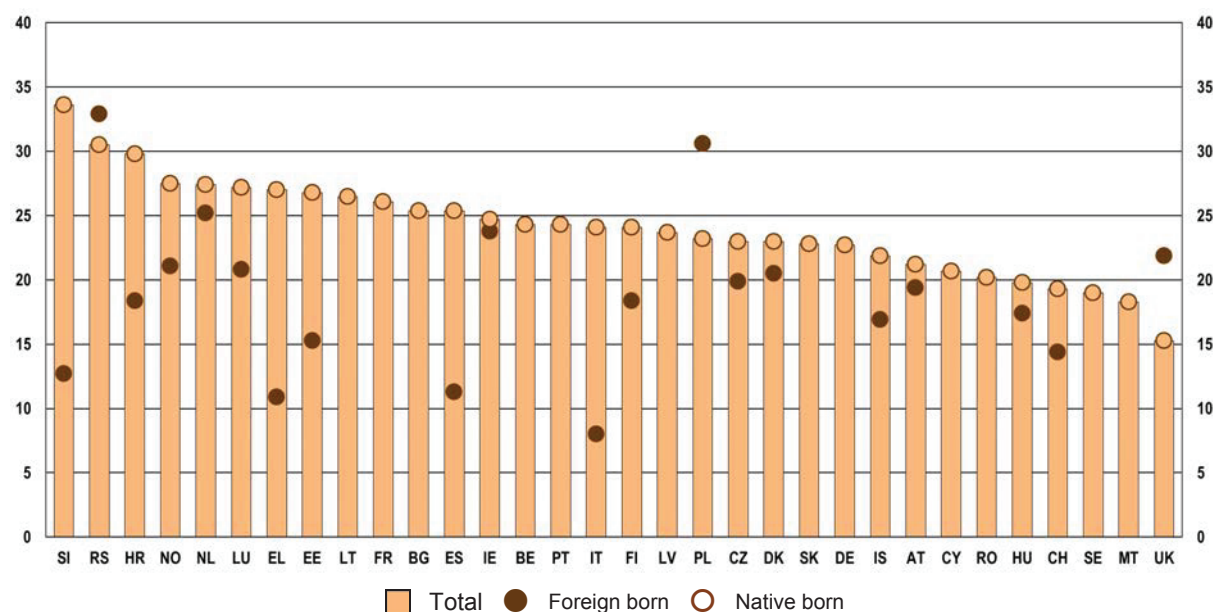
Foreign-born young adults are more likely to quit education and training at an early stage than native-born in nearly all EHEA countries for which data is available. The exceptions are Serbia⁽⁹⁾ and the United Kingdom, which might at least partly be related to the comparatively high number of international students in that country (see Figures 7.14 and 7.18). In Greece, with a share of 35.7 %, foreign-born men and women aged 18-24 are almost five times as often early leavers from education and training than native-born men and women of that same age group, in Switzerland the ratio is four to one, in Austria three to one. In Italy, Belgium, Cyprus, Sweden and Luxembourg foreign-born young adults are twice as likely to leave education and training without completing upper secondary education as their native-born counterparts. In the remaining countries, the differences between the native-born and the foreign-born population are not as big, while the rates for the foreign-born population can still be quite high (e.g. 26.5 % in Iceland and 35.3 % in Spain).

Figure 4.5 shows to what extent the discrepancies at lower education levels between those born abroad and those born within a country persist also at tertiary level. This indicator compares the participation rate in tertiary education of the foreign-born population aged 18 to 29 with the participation rate of the native-born population in the same age group. Children of immigrants born in the destination country ('second generation immigrants') are again counted as part of the native-born population. Similarly to Figure 4.4, the indicator also loses significance on the integration of the foreign-born population of a given country with a high share of international students.

Participation rates of young adults in tertiary education vary significantly across the EHEA, ranging from 15.3 % in the United Kingdom to 33.6 % in Slovenia. Yet, in almost all EHEA countries for which data are available, young adults born abroad have a lower participation rate in tertiary education than native-born young adults. However significant differences across the EHEA exist also in this regard. The participation rates of young adults born abroad range from 8 % in Italy to 27.7 % in France and 32.9 % in Serbia (with most of those born abroad coming from other parts of former Yugoslavia).

⁽⁹⁾ The Serbian data are of limited comparability, as the country of birth refers to nowadays borders and the category of 'foreign born students' thus also includes ethnic Serbs who were born in other parts of former Yugoslavia, which at the time of their birth still existed as one country. Similar limitations of comparability apply to the ex-Soviet countries in Eastern Europe.

Figure 4.5: Participation rates in tertiary education among the population aged 18-29 born abroad, native and total population, 2013



Notes:

'u': not reliable and not publishable and *italics*: not reliable.

Data are sorted by participation rate in tertiary education of the total population.

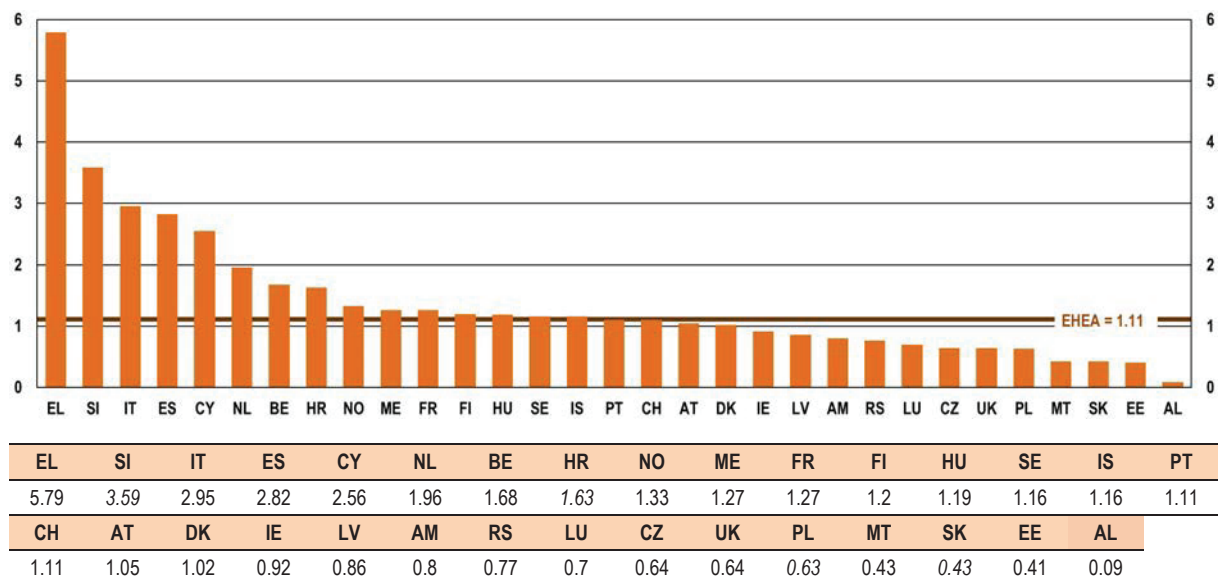
Source: Eurostat, Labour Force Survey (EU-LFS) and additional collection for the other EHEA countries.

Since these differences are partly linked to divergence in general participation rates in tertiary education across countries, when analysing the potential disadvantages of young adults with an immigration background, one has to compare the gaps in participation ratios of foreign-born and native-born young adults (keeping in mind the limitations linked to the definition of both groups). The largest gaps can be observed in Italy, Greece and Spain, where the participation rates in tertiary education between young adults born abroad and their native-born counterparts differ by more than 15 percentage points. In Luxembourg and Cyprus the gap is around 10 percentage points, while in Norway, Switzerland, Belgium, Finland, Portugal, Iceland and Sweden, the gap is between eight and four percentage points. In the remaining countries (the Czech Republic, Denmark, the Netherlands, Austria Ireland, France and Serbia), the gap amounts to less than three percentage points. In France and Serbia, this difference is to the advantage of foreign-born young adults. The United Kingdom with its large share of international students is again a special case: with 21.9 %, the share of young adults born abroad participating in tertiary education is significantly higher than the share of young adults born in the United Kingdom (14 %).

The last figure of this section (Figure 4.6) shows the overall chances of those born within a country over those born abroad to attain tertiary education, depicted as odds ratios. This means that the numbers in Figure 4.6 can be read as chances of native-born over foreign-born young adults to attain tertiary education. In Greece, this ratio is significantly to the disadvantage of foreign-born young adults

who are almost six times less likely to complete tertiary education than their native-born counterparts. In Italy, Spain and Cyprus, this ratio is almost one to three, while in the Netherlands and Belgium almost one to two. On the other hand, there are also countries (roughly one third of the countries with available data) in which adults born abroad have higher chances to attain tertiary education than those born within the country (in Estonia, Malta, the Czech Republic and the United Kingdom those chances are roughly twice as high). Again, it needs to be kept in mind that the foreign-born population also includes international students, which especially in the United Kingdom are of a significant number.

Figure 4.6: Tertiary education attainment of 25 to 34-year-olds by country of birth: odds ratio of native born over population born abroad to complete tertiary education, 2013



Notes:

‘u’: not reliable and not publishable and *italics*: not reliable. Armenia: 2012.

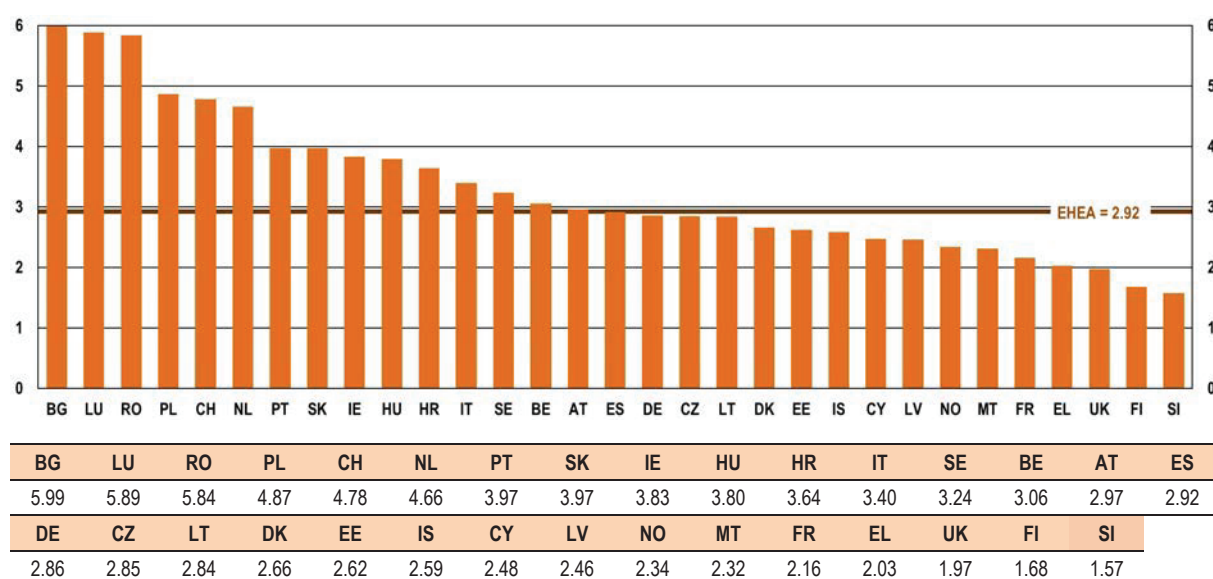
Source: Eurostat, Labour Force Survey (EU-LFS) and additional collection for the other EHEA countries.

4.1.3. Influence of parental education on tertiary education attainment

A core concern of the social dimension when it was introduced to the Bologna Process, as ministerial communiqués repeatedly stressed, was to enable young adults to enter, participate in and complete higher education without obstacles related to their social or economic background. One way to assess to what extent the social and economic background functions as obstacle to higher education is to examine the influence of the educational attainment of parents. Figure 4.7 therefore shows the odds ratios of young adults (25-34 years old) with highly educated parents over those with medium educated parents to attain tertiary education. The indicator takes into account the highest degree of both parents, so to be considered as ‘highly educated parents’, at least one of them must have completed tertiary education; while ‘medium educated parents’ refers to parents with upper secondary or post-secondary non-tertiary education as highest degree.

In all EHEA countries for which data are available, children of medium educated parents have much lower chances to attain tertiary education than children of highly educated parents. In most of the countries, the relative chances of young adults whose parents have only upper secondary or post-secondary non-tertiary education to attain tertiary education are two to five times lower than of those with at least one parent having completed tertiary education. In Finland and Slovenia the effect is slightly weaker; in Bulgaria, Luxembourg and Romania, on the other hand, it is particularly strong: in those countries children of medium educated parents are nearly six times less likely to attain tertiary education than children of tertiary educated parents.

Figure 4.7: Attainment by educational background: odds ratio of young adults (25-34) with highly educated parents (i.e. tertiary educational attainment) over young adults (25-34) with medium educated parents (i.e. upper secondary or post-secondary non-tertiary education) to complete tertiary education, 2011



Notes:

Source: Eurostat, EU-SILC.

That the share of students without higher education background (i.e. with parents who did not complete higher education) varies greatly across countries was also confirmed by the latest Eurostudent report. The report further showed that students without higher education background tend to enter higher education later and have a higher average age than their counterparts with highly educated parents. Moreover, in the large majority of countries covered by the Eurostudent report, the share of students without higher education background is higher at non-university higher education institutions than at universities (Hauschildt et al. 2015, pp.50-51).

4.2. Policy approaches to widening access and participation in higher education

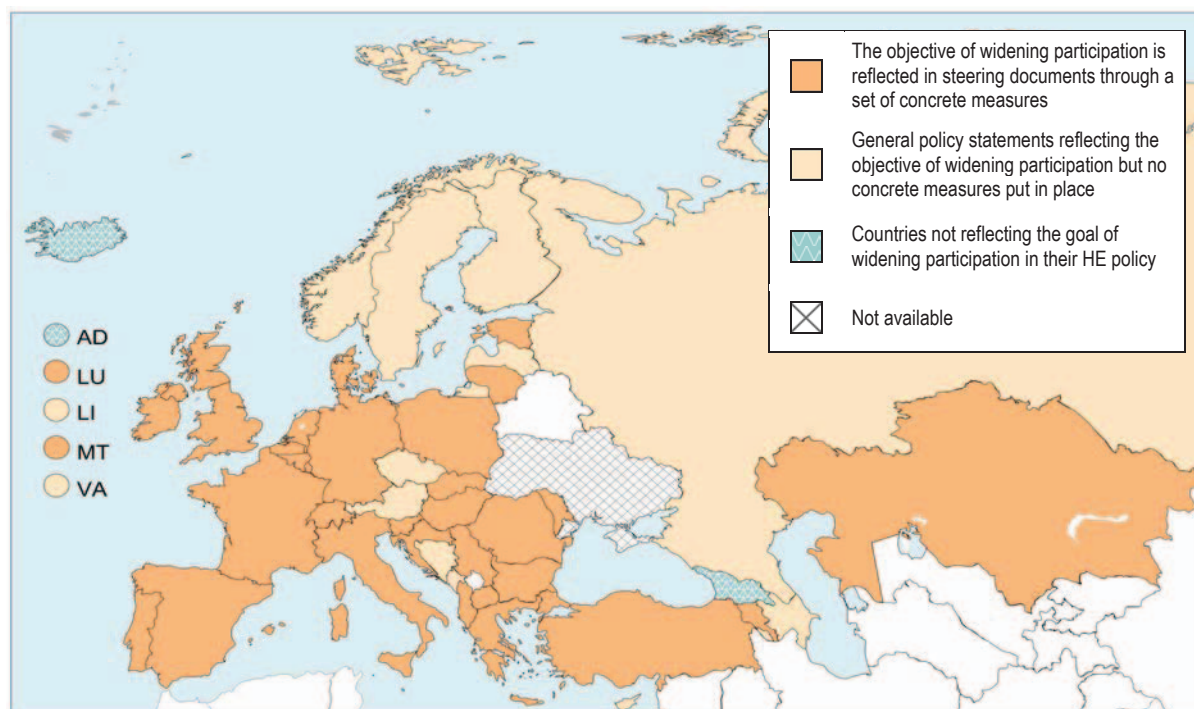
Against this background, this section outlines the different policy approaches to widening participation in higher education across the EHEA, drawing upon responses to the BFUG questionnaire and the latest Eurostudent report. It shows to what extent the objective of widening participation is reflected in national higher education policies, which concrete measures (if any) are in place, and if the resulting composition of the student body is subject to systematic monitoring.

4.2.1. Policy framework

As already shown by the previous reporting exercise, the objective of widening participation is reflected in the higher education policy of almost all EHEA countries (with the exception of Andorra, Georgia and Iceland). In 13 systems the objective of widening participation is reflected in steering documents through general policy statements without concrete measures being put in place. In two-thirds of the systems (32), it is reflected through a set of concrete measures (Figure 4.8). As the more detailed analysis below will show, the boundaries between the two groups of countries are not as clear-cut as it might seem at first sight. Norway, for instance, pursues a general approach to widening participation supported by measures such as no tuition fees, the possibility for everybody to obtain student loans and grants etc., but at the same time also implements several of the concrete measures

that other countries have included in their steering documents to reflect the objective of widening participation.

Figure 4.8: National policy approaches to widening participation in higher education, 2013/14



Source: BFUG questionnaire

4.2.2. Concrete measures to widen participation

Looking at the concrete measures taken across the EHEA to widen participation in higher education, two types of measures can be discerned: measures to increase participation as a whole, expecting this to increase the participation of underrepresented groups as well (also referred to as mainstreaming approach); and measures targeting specific underrepresented groups directly in order to achieve a more balanced composition of the student body. Most countries combine both approaches in one way or another.

Increasing overall participation and trying to organise higher education in a way that makes it accessible to the widest possible range of learners is the predominant approach in the Nordic countries (Denmark, Finland, Norway). This includes, for instance, offering higher education free of charge (which also applies to Turkey), combined with generous grants and loans for all students (Denmark and Norway), expanding the number of university places (also Germany, Malta, United Kingdom (England, Wales and Northern Ireland)), or providing funding for counselling (Belgium (French Community), France, Germany, Greece, Italy) and various student facilities (housing, meals, social, psychological and medical support, childcare etc.), as mentioned by Belgium (Flemish Community), Belgium (French Community), Bulgaria, Croatia, France, Italy, Moldova, Norway and Serbia.

While those measures are usually open to all students, several countries also implement measures targeting specific underrepresented groups, mainly students with disabilities, students from ethnic minorities or from socially and/or economically disadvantaged backgrounds.

The measure mentioned most frequently (by roughly half of the systems with concrete measures, 40 % of all systems ⁽¹⁰⁾) are scholarships for underrepresented groups of students (with disabilities,

⁽¹⁰⁾ Armenia, Belgium (Flemish Community), Bulgaria, Croatia, Estonia, France, Germany, Lithuania, Luxembourg, Malta, Moldova, the

orphans, from poor socio-economic background, from rural areas, released from military service, Roma etc.) or a needs-based study allowance and/or loan system.

Also quite common (reported by 15 systems) are special examination/study conditions or other support measures for students with disabilities. Six systems (Albania, "The former Yugoslav Republic of Macedonia", Moldova, Portugal, Romania, Serbia) work with admission/enrolment quotas and/or reduced or no tuition fees for certain groups of students (e.g. students with disabilities or Roma). In the United Kingdom (England), although higher education institutions determine their own admissions criteria, the Director of Fair Access has been appointed to safeguard and promote fair access for low-income and other underrepresented groups. The Director requires that each institution that charges higher fees (over £6,000 for full-time courses or £4,500 for part-time) has an Access Agreement with him that sets out how they will promote access to higher education for underrepresented groups through measures such as outreach activities or financial support. In the United Kingdom (Scotland), the Scottish Funding Council is investing just under £40million of additional funding over four years to support widening access and universities have committed to deliver 727 new widening access places in 2014 to increase the proportion of students entering Scottish universities from disadvantaged and challenging backgrounds. A few countries also offer special support to non-native speaking students (Denmark and Estonia) or to higher education institutions in rural areas (Estonia and Poland). Other measures mentioned are the provision of flexible learning opportunities, part-time or distance education and short-cycle programmes.

4.2.3. Quantitative objectives

With the Leuven/Louvain-la-Neuve Communiqué of 2009, ministers agreed that each participating country would set 'measurable targets for widening overall participation and increasing participation of underrepresented groups in higher education, to be reached by the end of the next decade' ⁽¹¹⁾.

Five years later, 70 % of the systems (34) have indeed defined such measurable targets. The vast majority (25 systems), however, have only targets for widening overall participation; three countries have targets with a reference to underrepresented groups only; six countries have both. In total, less than 20 % of the systems have measurable targets for increasing participation of underrepresented groups, as called for by the Leuven/Louvain-la-Neuve Communiqué. It could be argued that without the European Union's Europe 2020 strategy (see below), the number of systems having measurable targets for widening overall participation would be considerable lower. 14 systems (12 non-EU countries plus the United Kingdom) have not (yet) defined any specific quantitative objectives to be reached.

A year after the EHEA countries had adopted the Leuven/Louvain-la-Neuve Communiqué, the European Union countries among them adopted the Europe 2020 strategy and the target that by 2020 at least 40 % of young people (aged 30-34) should have completed tertiary or equivalent education. In the following, all EU countries except the United Kingdom ⁽¹²⁾ defined national targets for tertiary education in their Europe 2020 National Reform Programmes (European Commission, 2014a). As the BFUG reporting showed, also two non-EU/candidate countries (Montenegro and Serbia) have adopted

Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Switzerland, Turkey.

⁽¹¹⁾ Leuven/Louvain-la-Neuve Communiqué: The Bologna Process 2020 - The European Higher Education Area in the new decade. Communiqué of the Conference of European Ministers Responsible for Higher Education, Leuven and Louvain-la-Neuve, 28-29 April 2009.

⁽¹²⁾ The United Kingdom (England, Wales and Northern Ireland) declined to set national targets on the basis that this was considered unnecessary action at EU level and that target setting per se was not in line with national policy. While there are no national targets in the United Kingdom (Scotland) either, individual 'negotiated' targets are agreed with every higher education institution through outcome agreements.

such targets. As a result, 30 of the 48 systems covered by the present report have at least one quantitative objective regarding the population entering, participating in and/or completing higher education, namely a specific share of higher education graduates among the 30-34 year-olds to be reached by 2020, ranging from 26-27 % in Italy and Romania to 60 % in Ireland and 66 % in Luxembourg. Norway reported a quantitative objective concerning the population entering higher education, namely an increase by 24.800 in the number of study places by 2019 (compared to 2006).

Some of the countries have set more than one quantitative objective without reference to underrepresented groups. Those additional objectives mainly concern the share of the population aged 19 or 19-24 entering or participating in higher education (Germany, Malta, Slovenia) and the share of students or graduates in the fields of engineering and natural sciences (Estonia, Lithuania, Poland). After a steep increase in the first decade of the 21st century, the Czech Republic for 2015 defined upper ceilings for first-time enrolments in tertiary education (roughly up to two-thirds of the relevant age cohort) and Bachelor graduates continuing to study at Master level (not more than 50 %).

In addition to the objectives mentioned above, some countries (Finland, Greece, Ireland, Malta, Poland, Serbia) have defined also quantitative objectives with a reference to underrepresented groups. Three more countries (Kazakhstan, Moldova, Russia) have quantitative objectives with a reference to underrepresented groups only. So in total, only 9 out of 48 systems for which data is available have defined quantitative objectives with a reference to underrepresented groups of the student population. Some of them have defined enrolment targets to be reached (as share of the total student population). Ireland, for instance, aims to increase the share of undergraduate entrants with disabilities to 7 % by 2016, the share of mature students to 14 % and the share of students from lower socio-economic background to 21 %. Other countries reserve a given number or a percentage of study places for underrepresented groups of the student population. In Moldova, for example, at least 15 % of state-financed study places have to be offered to disadvantaged students falling into one of 13 categories (e.g. students with disabilities, from lower socio-economic background, ethnic minorities (Roma), or graduates of high schools to the left of the Nistru river). Finland focuses on imbalances and seeks to halve gender and regional differences and the effect of the social and ethnic background on participation in higher education by 2020. The gender differences in graduation in young age groups are to be reduced by 2020 and halved by 2025. The long-term aim is to remove those differences altogether. The underrepresented groups covered by the various targets are students with disabilities (Finland, Greece, Ireland, Kazakhstan, Moldova, Russia, Serbia), orphans (Greece, Kazakhstan, Moldova, Russia), mature students (Ireland, Malta, Poland, Slovenia), students from lower socio-economic background (Finland, Ireland, Moldova), from ethnic minorities (Finland, Moldova, Serbia), or from specific rural areas (Moldova) as well as gender groups (Finland, see above). In Norway, for privacy reasons, national education authorities are not allowed to collect data on disabilities, religion, ethnic origin etc. and therefore cannot implement quantitative objectives defined along those lines.

4.2.4. Monitoring of the composition of the student body

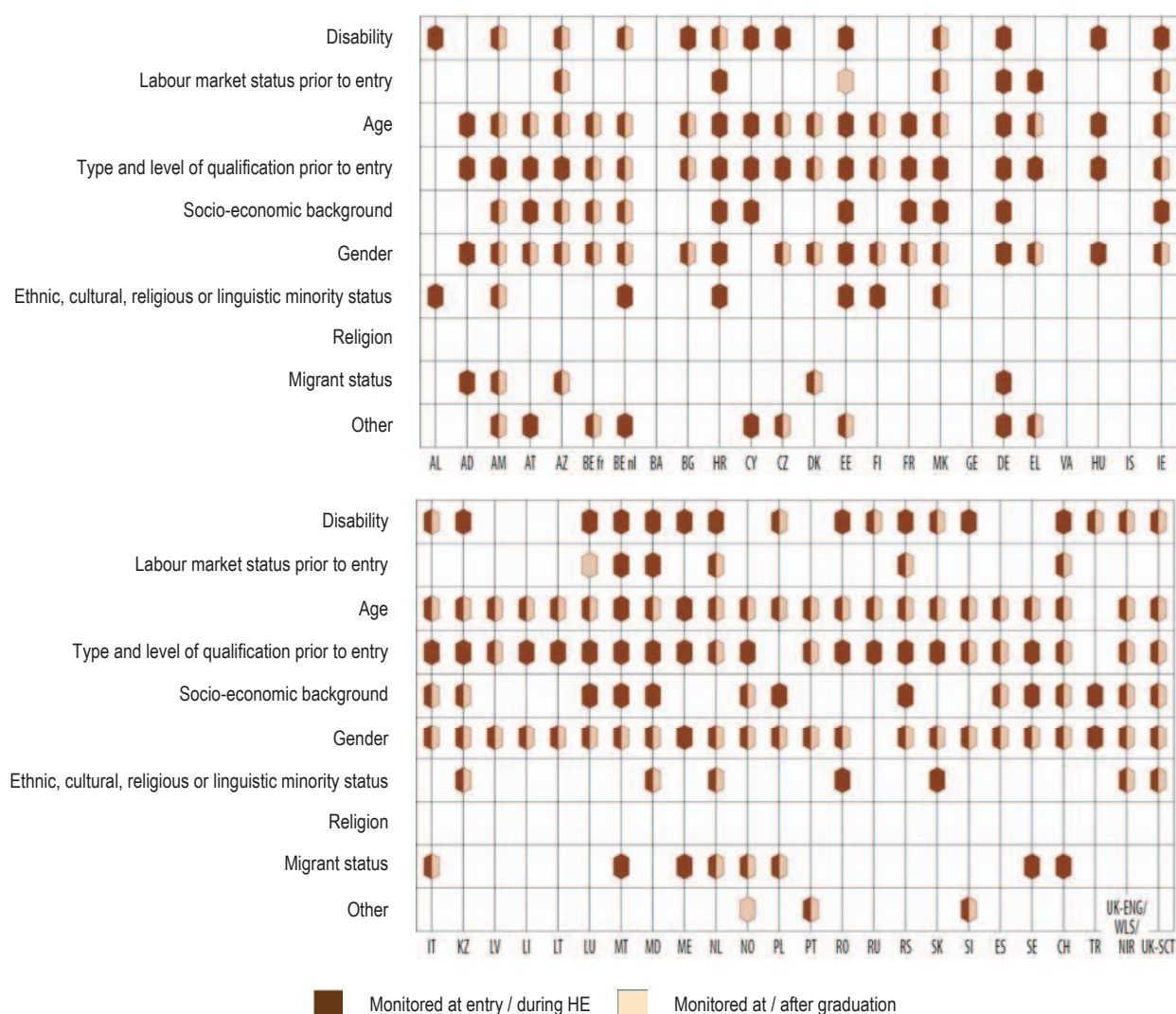
To be able to assess whether measures to widen access and participation in higher education have the desired effect, the composition of the student body needs to be systematically monitored over time.

In more than 90 % of the systems (in 44 out of 48) the composition of the student body is subject to some kind of systematic monitoring. Only in Bosnia and Herzegovina, Georgia, the Holy See and Iceland the composition of the student body is not systematically monitored, at least not at national level. In Iceland this might be connected to the fact that this country does not reflect the goal of widening participation in its higher education policy, as shown above. In Bosnia and Herzegovina it is linked to the constitutional set-up of the country, which results in fragmented monitoring by ten

cantonal ministries in the Federation of Bosnia and Herzegovina, the Ministry of Education and Culture of Republika Srpska and the Department for Education in the Government of Brčko District.

As Figure 4.9 shows, higher education systems that systematically monitor the composition of the student body most often take into account age (41) as well as type and level of qualification achieved prior to entry to higher education (40) and gender (40). More than half of the systems also take into account disability and socio-economic background; roughly a quarter look at ethnic, cultural, religious or linguistic minority status, migrant status, and/or labour market status prior to entry to higher education. A number of systems also monitor other characteristics, such as nationality, family status or the educational background of parents. Religion is a characteristic not taken into account at all.

Figure 4.9: Monitoring the composition of the student body, 2013/14



Most of the monitoring takes place at entry to higher education and/or during higher education studies, to a lesser degree (in fewer countries and covering fewer characteristics) also at graduation. Systematic monitoring *after* graduation was reported by roughly half of the systems, though often covering only one or two of the given characteristics. Systematic monitoring after graduation of a wider range of characteristics seems to exist in only a small number of systems (Ireland, Kazakhstan, the Netherlands, Portugal, Slovenia, Spain, Switzerland, the United Kingdom (England, Wales and Northern Ireland), the United Kingdom (Scotland)).

The monitoring is usually carried out by a ministry or governmental body and/or by higher education institutions with obligation to submit data to another body (ministry, statistical office or quality

assurance agency). In a number of countries, data is also collected by independent bodies and/or higher education institutions without obligation to report to another body, especially when it comes to monitoring after graduation.

In 39 of the 44 systems where a systematic monitoring of the composition of the student body takes place, mechanisms exist that encourage or oblige higher education institutions to participate in such a monitoring (the exceptions are Albania, Andorra, Croatia, Cyprus and Kazakhstan). Quite often the monitoring is part of regular data collection by national statistical offices; in some cases it is connected to quality assurance. Monitoring can also be connected to funding, for example with scholarships for certain categories of students or support for higher education institutions offering education to students with disabilities. In several countries, higher education institutions are obliged to keep a student register. A growing number of countries work with a central database (in some cases managed by the ministry in charge of higher education). Estonia, for instance, has established a comprehensive central database, which all types of educational institutions are obliged to feed with information on students, staff, curricula and certificates, and which allows to track students from primary to higher education.

In most systems (with the exception of Albania, Andorra, Bulgaria and Cyprus), results of monitoring activities are publicly available. In 25 cases, some or all results are shown for each individual higher education institution; in 15 cases, information is aggregated, usually for reasons of data protection. More than 80 % of the systems (39) report legal restrictions on publishing data on certain student characteristics; in 30 of them legal restrictions apply also to collecting data. Restrictions concern personal / private data for reasons of data protection (most frequently mentioned are ethnic origin & disabilities; also mentioned are religion, medical data, judicial data etc.). In some cases restrictions apply to data on individuals, while publication of aggregated data is possible. In some cases data collection (and publication) is possible on a voluntary basis (i.e. if students agree to it). In nine systems there are no legal restrictions on collecting and publishing data on student characteristics.

Asked about the main changes in the composition of the student body during the last decade, roughly a quarter of the systems that provided data (9 of 35) reported a greater share of international students. Less than 20 % reported an increase in the number of migrants or students from ethnic minorities; female students and graduates; mature students; students disclosing a disability and/or students from underrepresented socio-economic groups respectively. Six countries did not identify any major changes.

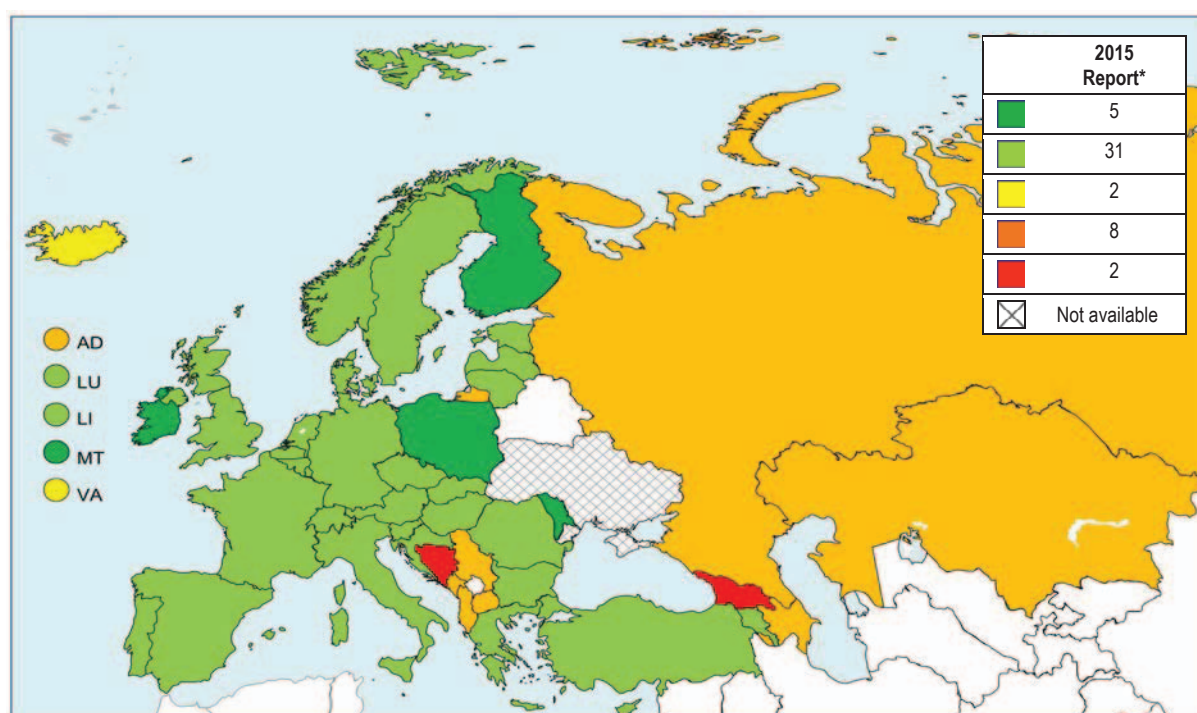
While in most systems the student body is subject to systematic monitoring, it often covers only a limited number of the characteristics usually referred to in the context of the social dimension, related to underrepresented groups. Moreover, it remains unclear to what extent the monitoring is actually linked to policy-making. It seems that only a small number of systems (e.g. Belgium (French Community), Estonia, Italy, the Netherlands, Norway, the United Kingdom (Scotland)) use the information on the composition of the student body to assess the impact of measures aimed at widening participation.

4.2.5. Summary of main policy measures

Figure 4.10 summarises these main policy elements in Scorecard Indicator 8. As the figure shows, the large majority of EHEA countries are in the light green category, which means that they provide need-based targeted support to disadvantaged students or mainstream support to more than 50% of students, and they monitor the composition of the student body as well. The 5 countries in the dark green category also have quantitative objectives with a reference to underrepresented groups in addition. The second largest group is the orange category, where countries do not have targeted support, and they provide mainstream support to 50% or less of higher education students.

Nevertheless, all countries in this group monitor the composition of the student body, and Kazakhstan and Russia have even quantitative targets with reference to underrepresented groups. Finally, the two countries in the red category are Bosnia and Herzegovina and Georgia, as they neither monitor the composition of the student body, nor have defined relevant quantitative objectives.

Figure 4.10: Scorecard Indicator (8): Measures to support the participation of disadvantaged students 2013/14



Source: BFUG questionnaire.

Scorecard categories:

- 1 Financial support targeted at disadvantaged students **OR** Mainstream support with need-based allocation provided to more than 50% of students*;
2 Quantitative policy objectives for participation and/or completion of disadvantaged students;
3 Monitoring participation and completion of disadvantaged students.
- Financial support targeted at disadvantaged students **OR** Mainstream support with need-based allocation provided to more than 50% of students;
No quantitative policy objectives for participation and/or completion of disadvantaged students;
Monitoring participation and completion of disadvantaged students.
- Financial support targeted at disadvantaged students **OR** Mainstream support with need-based allocation provided to more than 50% of students;
No quantitative policy objectives for participation and/or completion of disadvantaged students;
No monitoring of participation and completion of disadvantaged students.
- No financial support provided to disadvantaged students and provided to 50% of students or less;
EITHER quantitative policy objectives for participation and/or completion of disadvantaged students
OR Monitoring of participation and completion of disadvantaged students **OR BOTH**.
- No financial support provided to disadvantaged students and provided to 50% of students or less;
No quantitative policy objectives for participation and/or completion of disadvantaged students;
No monitoring of participation and completion of disadvantaged students

* If mainstream support is offered to all students, then the need based criterion is not considered.

4.3. Opening access routes to higher education, recognition of prior learning and student services

In this section, some of the measures aimed at widening participation (and promoted in the context of the Bologna Process for many years) are examined in more detail. Particular attention is given to alternative access routes to higher education and to the extent to which they are implemented across the European Higher Education Area to allow learners who do not meet standard entry requirements to still enter higher education, for instance by recognising their prior non-formal and informal learning. In addition, a brief overview is provided of the type of counselling and guidance services that are most commonly offered to students.

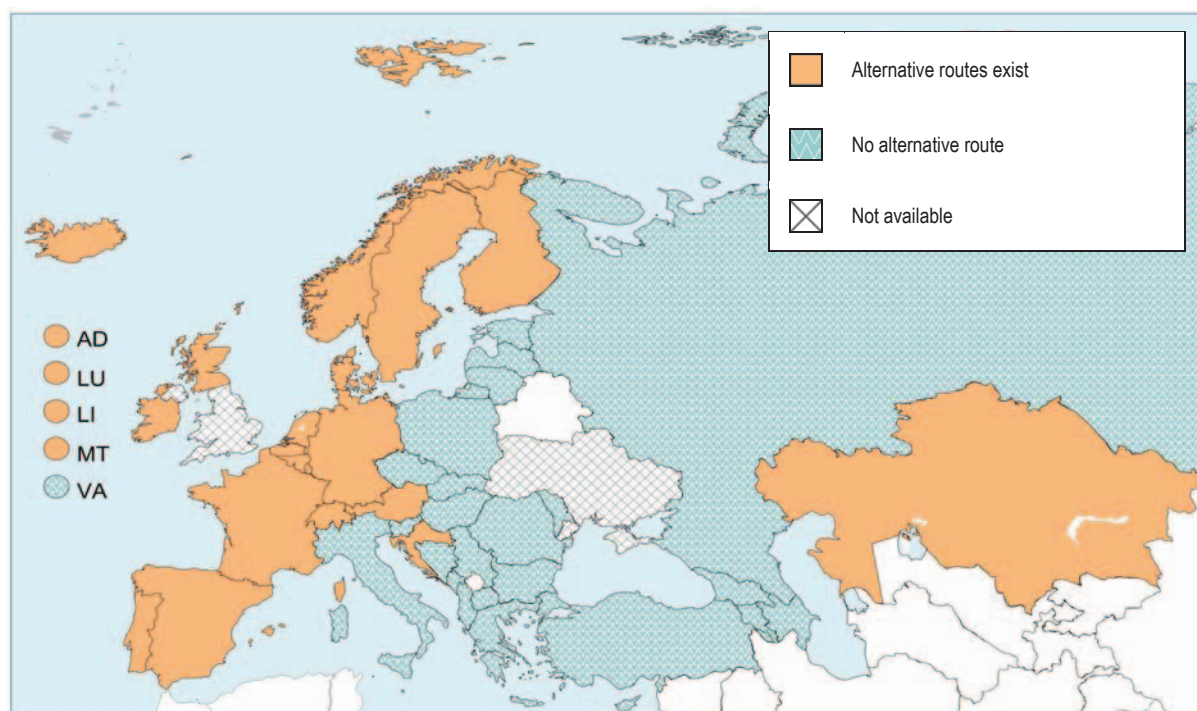
4.3.1. Access routes to higher education

The traditional direct access route to higher education is the possession of an upper secondary qualification, general (ISCED 34) or vocational (ISCED 35). In the vast majority of the systems covered by this report, meeting those standard entry requirements does not guarantee access to higher education, though. In 70 % of the systems, individuals that meet standard entry requirements do not have a guaranteed right to higher education. Typically, students compete for a limited number of places and are selected on the basis of their level of achievement in the upper secondary qualification and/or an additional entrance examination. In some countries, there are central entrance exams that all students need to pass; in other countries, it depends on individual higher education institutions and/or the field of study whether an entrance exam needs to be taken.

In the remaining 30 % of the systems, individuals that meet the standard entry requirements have a guaranteed right to higher education in some (or most) fields of study and/or at higher education institutions other than universities (which can also be related to the field of study) and they are commonly accepted to the institution of their own (first) choice. Special admission requirements, such as *numerus clausus*, entry exam or aptitude test, usually apply to medicine, architecture, arts, music and/or sports.

As far as alternative access to higher education is concerned, the overall picture across the EHEA looks very similar to the situation described in the previous implementation report. In 22 higher education systems (most of them in Western Europe) at least one such alternative route to higher education exists, while in the remaining 25 systems for which data is available the access to higher education still depends on the possession of an upper secondary school leaving certificate (general or vocational) (see Figure 4.11).

Figure 4.11: Alternative routes to higher education for non-traditional candidates, 2013/14



Source: BFUG questionnaire

There is only one country (Croatia) that in the meantime has introduced an alternative route to higher education where none existed before: at some higher education institutions, mature students (25+) may enter without State Matura exam. The ministry recently identified access of non-traditional students to higher education as one of its strategic priorities and under the funding agreements for the period 2012-2015 provides additional funding to higher education institutions that facilitate the access of students older than 25 years.

Incentives for higher education institutions to admit non-traditional students exist in roughly a third of the higher education systems.

Several systems also mentioned the possibility to get an upper secondary qualification, which in turn gives access to higher education, via 'second chance' education (Cyprus, Germany, Ireland, Sweden).

About half of the higher education systems offer one or several types of bridging programmes: programmes targeted at those who have completed an upper secondary programme, which does not allow direct access to higher education (Croatia, the Czech Republic, "The former Yugoslav Republic of Macedonia") and/or targeted at those who left school prior to completion of any type of secondary education (France, Greece, Moldova, Slovenia, United Kingdom (England, Wales and Northern Ireland), United Kingdom (Scotland)). Those programmes are usually leading to an upper secondary qualification or equivalent, but can also give direct access to a specific higher education institution (Iceland) or higher education programme / field of study without leading to a particular qualification (United Kingdom (Scotland)). A few countries (Denmark, Finland, Malta) offer special bridging programmes for refugees and immigrants. Finally, there are bridging programmes to equip candidates with specific qualifications required for a specific study programme (e.g. engineering) (Denmark, Norway, Sweden).

In a number of countries it is also possible to enter higher education without formal entry qualification. In some cases, candidates not possessing the required entry qualification may be admitted on the basis of an entry exam instead. Another access route is the recognition of prior learning and/or vocational experience, which will be dealt with in more detail in the next section. Often, such

exceptions are available only to mature students, although the required minimum age differs from country to country, or even from institution to institution.

4.3.2. Recognition of non-formal and informal learning

The importance of the recognition of knowledge and skills gained through non-formal and informal learning has been stressed by communiqués of ministerial conferences for years and with the Bucharest Communiqué ministers explicitly agreed to ‘step up [their] efforts towards underrepresented groups to develop the social dimension of higher education, reduce inequalities and provide [...] alternative access routes, including recognition of prior learning’ ⁽¹³⁾.

Nevertheless, in more than half of the systems (28), it is still not possible for candidates to be admitted to higher education on the basis of the recognition of prior non-formal and informal learning. In those countries, all higher education candidates must hold a higher education entry qualification (or pass an entry exam). Some of those countries (Moldova, Montenegro, Poland and Turkey) are, however, in the process of developing a regulatory framework.

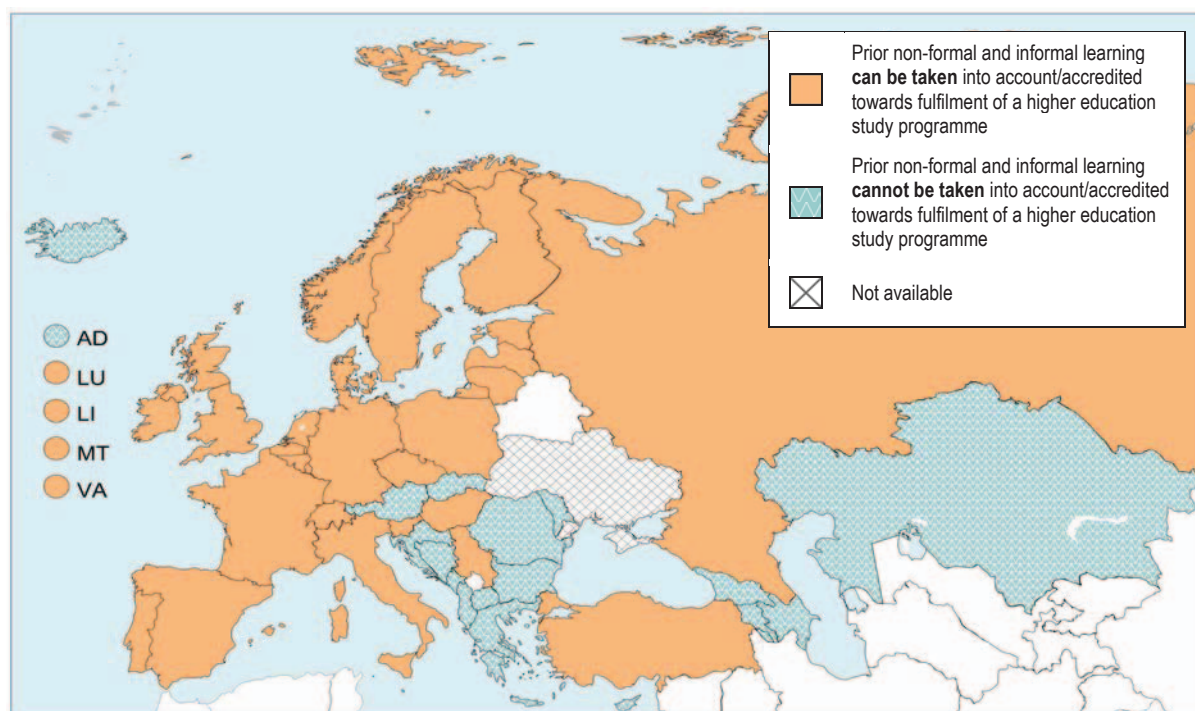
In nine systems, at least some (types of) higher education institutions (e.g. universities of applied sciences) or programmes are already open to admission based on the recognition of prior non-formal and informal learning. In 11 systems, admitting candidates without standard qualifications based on the recognition of prior learning is possible in all higher education institutions/ programmes. In eight of those systems (Belgium (French Community), Denmark, France, Germany, Luxembourg, Norway, Portugal, Sweden), access to recognition procedures is a legal right for candidates and all higher education institutions are obliged to provide relevant procedures. The final decision about recognising learning (to gain credit and/or exemption from qualifications) rests with higher education institutions. In 10 systems (with and without recognition procedures as legal right), steering documents however refer to one or more specific requirements, such as age (Ireland, Norway, Portugal) or duration of prior professional experience (Belgium (French Community), Denmark (for some programmes), France, Germany, Ireland, Liechtenstein, Luxembourg).

More widely implemented than admission based on the recognition of prior non-formal and informal learning is the possibility to take prior learning into account towards fulfilment of a higher education study programme. As Figure 4.12 shows, this possibility exists in 29 systems (18 of which also offer admission based on the recognition of prior learning). In about half of the 29 systems, it is a legal right for candidates to have their prior non-formal and informal learning recognised towards fulfilment of a higher education study programme and higher education institutions must provide relevant procedures. In the other half, higher education institutions can autonomously decide whether they will provide relevant procedures.

In a number of systems, higher education candidates or students who would like to fulfil their higher education modules / programme through the recognition of non-formal and informal learning need to meet special requirements, mainly related to the duration of prior professional experience (in Denmark 2 years (only for some programmes), in France, Luxembourg and Malta 3 years, and in Belgium (French Community) 5 years). In Portugal and the United Kingdom (Scotland) it is up to higher education institutions to define the requirements that need to be met.

⁽¹³⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, pp.1-2.

Figure 4.12: Recognition of prior learning for progression in higher education studies, 2013/14



Source: BFUG questionnaire.

In the majority of cases (20), recognition of non-formal and informal learning can only lead to a limited number of credits. How this limit is defined, differs a lot. The lowest limits concerning the number / share of credits that may be given on the basis of recognition of prior learning exist in Italy (up to 12 ECTS), Spain (up to 15 %) and Portugal (up to one third). In Germany and Switzerland up to 50 % of a study programme may be accredited on the basis of recognition of prior learning; a similar approach is proposed by the regulatory framework developed by Poland; in Hungary up to two-thirds and in Lithuania up to 75 %. In Belgium (French Community) and in Norway at least 60 credits need to be gained at the degree-awarding higher education institution. In the United Kingdom (Scotland) and Sweden it is up to higher education institutions to decide how many credits they grant on the basis of recognition of prior learning (in the United Kingdom (Scotland) it is generally up to 50 %).

In nine systems (Belgium (Flemish Community), Denmark, Finland, France, Ireland, Luxembourg, Malta, the Netherlands, the United Kingdom (England, Wales and Northern Ireland)) recognition of non-formal and informal learning can lead to a complete award of a higher education qualification. In most of those cases it is however more a theoretical possibility or still in the progress of being developed rather than a common practice. In Denmark it only applies to education programmes for adults, not to regular study programmes. The only country with a well-established and commonly used practice to award full degrees based on the recognition of prior non-formal and informal learning seems to be France. In 2012, 60 % of the cases of recognition of prior learning concerned the award of full degrees (compared to 17 % in 2002), mainly master degrees and professionally-oriented "Licences" (first-cycle degrees). So with 4 016 recognition of prior learning cases in total, this would be around 2 400 degrees.

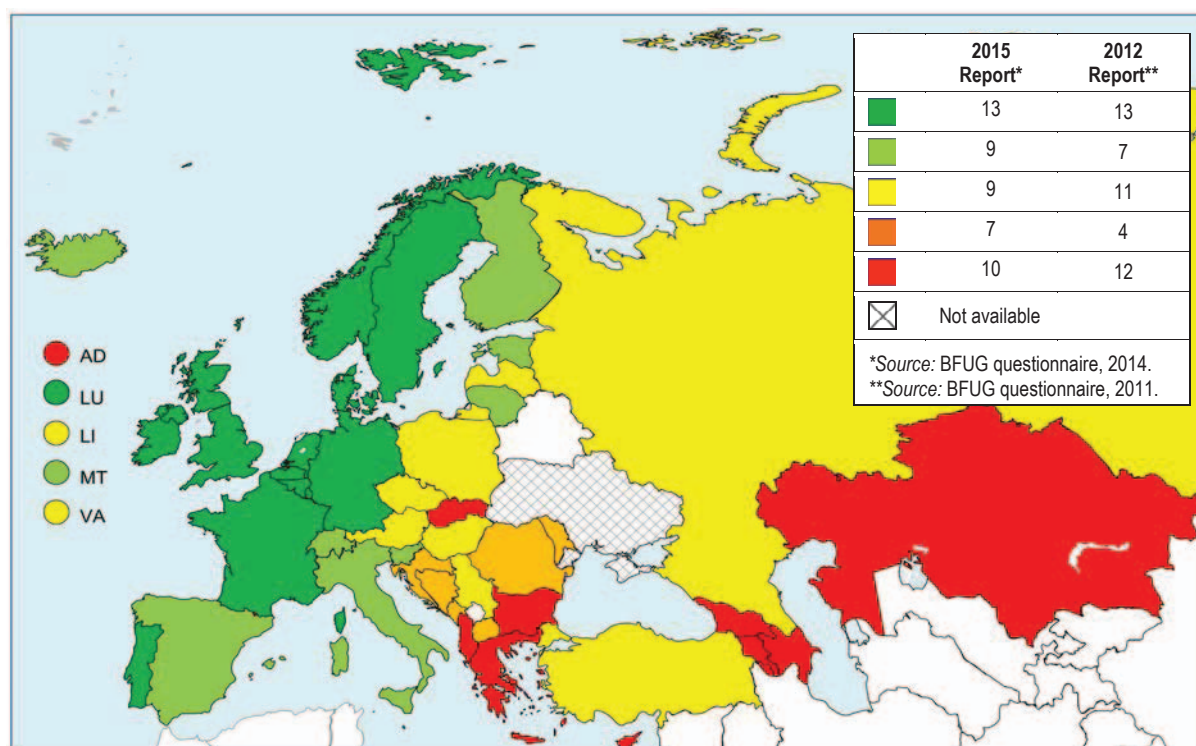
In 19 systems, mainly in the South-East, prior non-formal and informal learning cannot be taken into account / accredited towards fulfilment of a higher education study programme. In two of the 19 countries (Austria and Iceland), some higher education institutions or programmes are open to *admission* on the basis of recognition of prior learning. In the remaining 17 systems, recognition of prior non-formal and informal learning is not used at all, neither for admission to nor for progression in

higher education. However, in a number of systems work has started to establish a policy, guidelines and/or procedures on the recognition of prior learning, as is also reflected in Figure 4.13.






The scorecard indicator combines the results on the recognition of prior learning for both, admission to and progression in higher education. It examines if nationally established procedures, guidelines or policies exist on one or both forms of recognition of prior learning, and to what extent they are used in practice. As already in 2012, the top score (dark green) is reached by 13 systems (of 48 for which data is available). They have procedures, guidelines or a policy for assessment and recognition of prior learning as a basis for both, access to higher education programmes *and* allocation of credits towards a qualification and/or exemption from some programme requirements, *and* these procedures are demonstrably applied in practice. Nine systems are in an advanced stage of development as far as the recognition of prior learning is concerned (light green). Either there are procedures, guidelines or policies for both access and progression but the recognition of prior learning is not common practice yet, or guidelines exist and are commonly applied for only one of the two purposes (access to *or* progression in higher education). In another nine systems (yellow), guidelines also exist for only one of the two purposes but are not demonstrably applied in practice or recognition of prior learning is implemented at some higher education institutions in the absence of any national guidelines or policy. In seven systems (orange) the implementation of recognition of prior learning is still in a very early stage of development. On the whole, a slight improvement can be noticed when comparing the situation to 2012. Yet, also in 2015 there are 10 systems (red) that still do not have any procedures for the recognition of prior learning in place, neither at national nor at institutional level.

So the recognition of non-formal and informal learning clearly remains an area where further action is needed. This applies to the recognition of prior learning as a basis for allocation of credits towards a qualification and/or exemption from some programme requirements and even more so to recognition of prior learning as basis for access to higher education programmes.

Figure 4.13: Scorecard Indicator (9): Recognition of prior learning, 2013/14*



Scorecard categories:

-  There are nationally established procedures, guidelines or policy for assessment and recognition of prior learning as a basis for 1) access to higher education programmes, and 2) allocation of credits towards a qualification and/or exemption from some programme requirements, AND these procedures are demonstrably applied in practice.
-  There are nationally established procedures, guidelines or policy for assessment and recognition of prior learning as a basis for 1) access to higher education programmes, and 2) allocation of credits towards a qualification and/or exemption from some programme requirements, BUT these procedures are not demonstrably applied in practice.
OR
There are nationally established procedures, guidelines or policy EITHER for 1) OR for 2) (see above), AND these procedures are demonstrably applied in practice.
-  There are nationally established procedures, guidelines or policy EITHER for 1) OR for 2) (see above), BUT these procedures are not demonstrably applied in practice.
OR
There are no specific procedures/national guidelines or policy for assessment of prior learning, but procedures for recognition of prior learning are in operation at some higher education institutions or study programmes.
-  Implementation of recognition of prior learning is in a pilot phase at some higher education institutions
OR
Work at drawing up procedures/national guidelines or policy for recognition of prior learning has started.
-  No procedures for recognition of prior learning are in place EITHER at the national OR at the institutional/programme level.

Other than might be expected, the responses to the BFUG questionnaire on this topic included hardly any references to national qualifications frameworks. Only five systems (France, Ireland, Liechtenstein, Malta and the United Kingdom (Scotland)) explicitly referred to the respective national qualifications framework (NQF) as one of the steering documents on which recognition of prior non-formal and informal learning for the purposes of admission to and/or progression in higher education is based. Three more countries mentioned their NQF as part of their plans for the future: Bosnia and Herzegovina as well as "The former Yugoslav Republic of Macedonia" are planning to introduce a possibility to have prior non-formal and informal learning taken into account/accredited towards fulfilment of a higher education study programme in the context of their work on the national qualifications framework. In Croatia there are no explicit obstacles in the legislation for higher education institutions to take into account prior non-formal and informal learning in the admission process, but it is not an existing practice. Therefore, the need has been recognised to develop an appropriate legislative framework for the validation of non-formal and informal learning that is quality-assured and in line with the development of the national qualifications framework. No other countries referred to their national qualifications frameworks in the context of recognition of prior learning or widening access more generally, which is quite remarkable, given that one of the purposes of national qualifications frameworks is precisely to facilitate access to higher education by creating a variety of access routes.

4.3.3. Statistics and monitoring on alternative access routes and recognition of prior learning

As shown above, in 22 higher education systems there is at least one alternative route to higher education (for candidates without upper secondary school leaving certificate, general or vocational). In most cases, there is however no official data on how many candidates actually make use of those alternative routes to enter higher education. Where there is data, or where countries were able to provide at least estimates, it appears that usually only a (very) small proportion of students enter higher education through an alternative route – in Belgium (Flemish Community), Finland, Austria and Switzerland 1 % or less; in Norway, the Netherlands, Germany, Andorra and France 1-3 %. Notable exceptions are Ireland and Malta, where more than 10 % of students use an alternative route to gain access to higher education.

As far as the recognition of prior non-formal and informal learning is concerned, only half of the systems with the possibility of admission to higher education on the basis of recognition of prior learning could provide official data or estimates. In most cases, the proportion of students entering

through this route tends to be less than 5 % (in Belgium (Flemish Community) and Finland less than 1 %, in Belgium (French Community), France, Germany, Iceland, Liechtenstein and Norway 1-5 %). Only Denmark (6-10 %) and Malta (11-20 %) report higher shares.

As far as the recognition of prior non-formal and informal learning as a means of progression in higher education studies (i.e. towards fulfilment of studies) is concerned, data availability is also limited. Of the 30 systems, in which prior non-formal and informal learning can be taken into account/accredited towards fulfilment of a higher education study programme, only four could provide official data on the proportion of higher education institutions, which commonly make use of it - in Estonia and France more than 96 % of the institutions do so, in Lithuania 51-75 %, in Belgium (French Community) 26-50 % of the universities (in the latter case available data does not cover university colleges, arts colleges or social advancement education institutions). Another six systems provided estimates, according to which in Finland more than 96 % of higher education institutions commonly use recognition of prior non-formal and informal learning for the purposes of progression in higher education studies; 26-50 % of institutions in Belgium (Flemish Community) as well as in Ireland, and 5-25 % of the institutions in Hungary, Serbia and Switzerland.

Official data on the number of students who participated in the recognition of non-formal and informal learning and were exempted from some or all higher education programme requirements also exist in only four systems. In Belgium (Flemish Community), 137 students made use of this opportunity (academic year 2013/14); in Estonia 6.178 (2013) and in France 4 016 (2012). In Belgium (French Community) the number of university students who were exempted from higher education programme requirements based on the recognition of prior non-formal and informal learning rose from 185 in 2008 to 662 in 2012 (for university colleges, arts colleges or social advancement education institutions data is not available). Lithuania estimated the number to be between 300 and 500 per year; Serbia estimated a rate of around 1 %.

The vast majority of the systems, however, were not able to provide estimates, let alone official data, of the extent to which the opportunity to have prior non-formal and informal learning accredited towards fulfilment of a higher education programme is used in practice. This could be one of the issues to be flagged for future follow-up.

4.3.4. Student services

When the Bergen Communiqué of 2005 first listed concrete measures related to the social dimension, one of the measures included with a view to widening access was to provide students, especially from socially disadvantaged backgrounds, with adequate counselling and guidance services ⁽¹⁴⁾. Subsequent communiqués confirmed the importance of such services, most recently the Bucharest Communiqué with which ministers agreed to ‘step up [their] efforts towards underrepresented groups to develop the social dimension of higher education, reduce inequalities and provide adequate student support services, counselling and guidance’ ⁽¹⁵⁾.

While higher education institutions may offer various types of student support services, the BFUG questionnaire focused on academic guidance services, career guidance services and psychological guidance services. In all higher education systems for which data is available (48), academic and/or career guidance services are commonly provided by higher education institutions; in 44 systems higher education institutions offer both types of services, in Bosnia and Herzegovina as well as Slovakia only academic guidance; in Albania and Romania only career guidance. In two-thirds of the

⁽¹⁴⁾ The European Higher Education Area - Achieving the Goals. Communiqué of the Conference of European Ministers Responsible for Higher Education, Bergen, 19-20 May 2005.

⁽¹⁵⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, pp. 1-2.

systems, higher education institutions provide psychological guidance services as well. Roughly half of the systems also report on additional services offered by higher education institutions, such as healthcare, catering and accommodation, services related to sports and culture, or internationalisation services. Several countries also refer to special services for students with disabilities. In some cases different types of services can be combined, for instance with career guidance for students with disabilities. Career guidance services targeting underrepresented groups of students are offered in 15 systems, as will be shown in more detail in chapter 6.

In all systems for which information is available, support services are not only offered to enrolled students but also to prospective students. In all 48 systems, prospective higher education students can receive professional advice about their further studies and careers. In Ireland and Poland advice is available to *some* prospective students, in all other countries it is available to *all* prospective students. In the vast majority of cases (41) those services are provided free of charge by both higher education institutions and upper secondary schools, in Norway and Portugal only by the latter; in Azerbaijan, Bosnia and Herzegovina, Greece, the Holy See and Lithuania only by higher education institutions. In 30 systems this is complemented by external service providers that offer information, advice and guidance to prospective students, in 18 cases also free of charge, in 12 cases for a fee. In addition, a small number of systems also offer services targeting specific groups of prospective students that are expected to face particular obstacles (with disabilities, from lower socio-economic background, mature students or women in sciences). Even if services offered to prospective students are not necessarily targeting specific groups of prospective students, they can be highly relevant to underrepresented groups and contribute to widening access to higher education. The same applies to support for the transition of newly admitted students, which is particularly important for 'non-traditional students', as they are more likely to drop out of higher education than their peers.

Support provided to newly admitted students as well as career guidance services are discussed in more detail in Chapter 6.

4.4. Fees and financial support

Comparing fee and support systems in higher education in the EHEA region is far from an easy task. From the student perspective, it is the interplay between fees and support that is important, as a student will perceive fees very differently according to the level of financial support that (s)he receives. There are many factors influencing the size of the student financial burden and the support for students. For fees, such factors include the criteria determining which students have to pay fees, the amount and range of fees (also relative to income levels in a given country), or the timing of fee payments (upon enrolment, throughout the studies or after graduation). For student support, similar factors play a role, including the criteria determining which students receive support, what forms of support are available for students and their families, and what kind of costs student support actually covers. All this needs to be taken into account in order to provide a full picture of students' financial reality in the EHEA. This section aims to highlight some aspects of this reality.

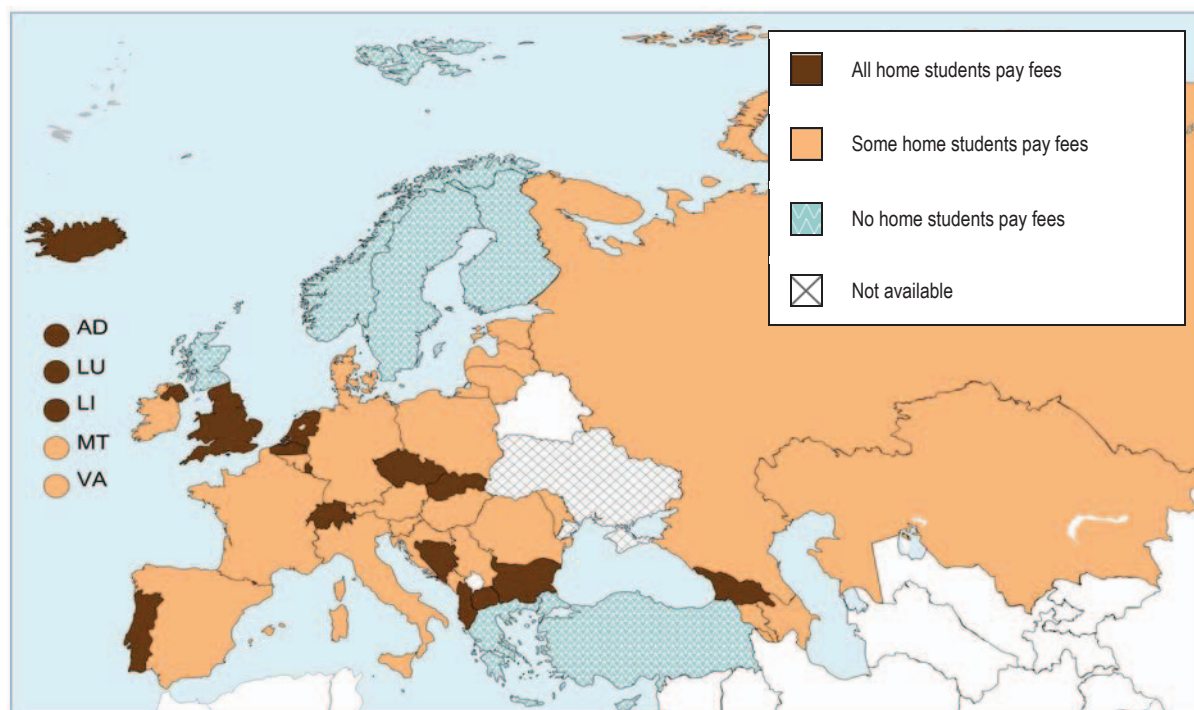
4.4.1. Student costs

The (perceived) costs of higher education are likely to influence the decision of prospective students and their families whether to start studying at higher education level or not. The existence of fees is one criterion to consider; however, this information needs to be complemented by the proportion of students paying fees and based on what criteria, the amount of fees, and whether there is student support covering (at least parts of) the costs of living of a higher education student. Most of these issues are discussed in this section in turn, while information on student support is analysed in section 4.4.2.

The prevalence of fees across the EHEA

Figure 4.14 illustrates the prevalence of fees in EHEA countries in the first cycle. Definitions of fees differ across countries, but here fees are understood as comprising not only tuition fees but also all forms of administrative fees that may be charged to students (for registration, certification etc.). However, the amounts of fees students actually have to pay are not shown on the figure. The information presented on the map concerns all home students and/or students who are considered under the same fee regime as home students. International students, who have to pay fees in most countries, are not included in the figure.

Figure 4.14: Prevalence of fees in public higher education institutions for home students in the first cycle, 2013/14



Source: BFUG questionnaire

Without taking into account the amount of fees paid by students, the overall picture of fees has remained quite stable across the EHEA since the 2012 Bologna Implementation Report. Figure 4.14 shows that, in the majority of countries, at least some students are required to pay fees in public higher education institutions. In 16 education systems, all home students have to pay fees, though in some cases such fees are only small administrative charges (e.g. in the Czech Republic).

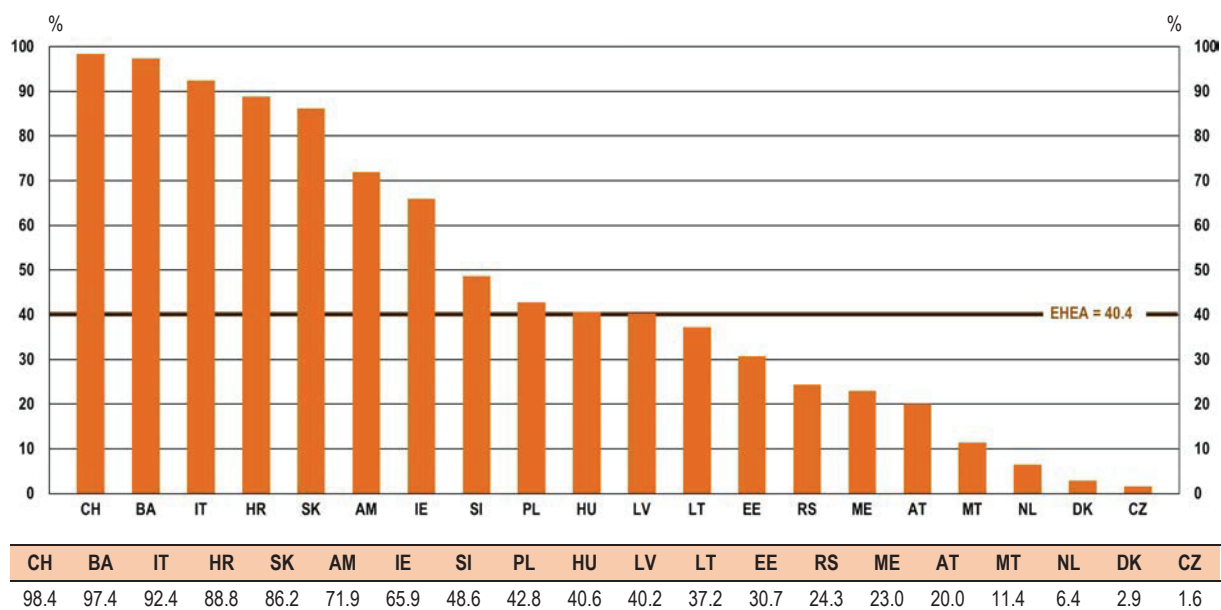
No fees are charged to first cycle home students in seven systems: in three Nordic countries (Finland, Norway and Sweden), Cyprus, Greece, Turkey and the United Kingdom (Scotland). In Germany, while registration fees exist, all *Länder* have just recently abolished all tuition fees in higher education.

In general, the situation in the second cycle mirrors the first cycle, with the exception of Cyprus and Greece. In Cyprus, while no students have to pay fees in the first cycle, all students have to do so in the second cycle. In Greece, some students have to pay fees in the second cycle.

Among the countries where not all students pay fees, the actual percentage of fee-payers can differ widely. For example, based on Eurostudent information on Bachelor (thus first cycle) students depicted on Figure 4.15, around 90 % of students pay fees in Italy and Croatia, while less than 10 % do so in Denmark ⁽¹⁶⁾.

⁽¹⁶⁾ Discrepancies between Figure 4.14 and 4.15 are due to the following circumstances: 1) in certain countries, while all students pay fees as a rule, fee waivers for some student might exist based on socio-economic background (e.g. in Switzerland); 2) the amount of

Figure 4.15: Percentage of Bachelor students who pay fees, 2013/14



Notes:

EUROSTUDENT Question(s): 3.7. What are your average expenses for the following items during the current semester?

No data is available for Germany, Finland, France, Georgia, Romania, Russia and Ukraine. Too few cases for BA students who pay fees: Sweden.

Deviations from EUROSTUDENT survey conventions: Germany, France. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro and Romania.

Czech Republic: the amount of registration fees is so low that not all students perceive them as fees.

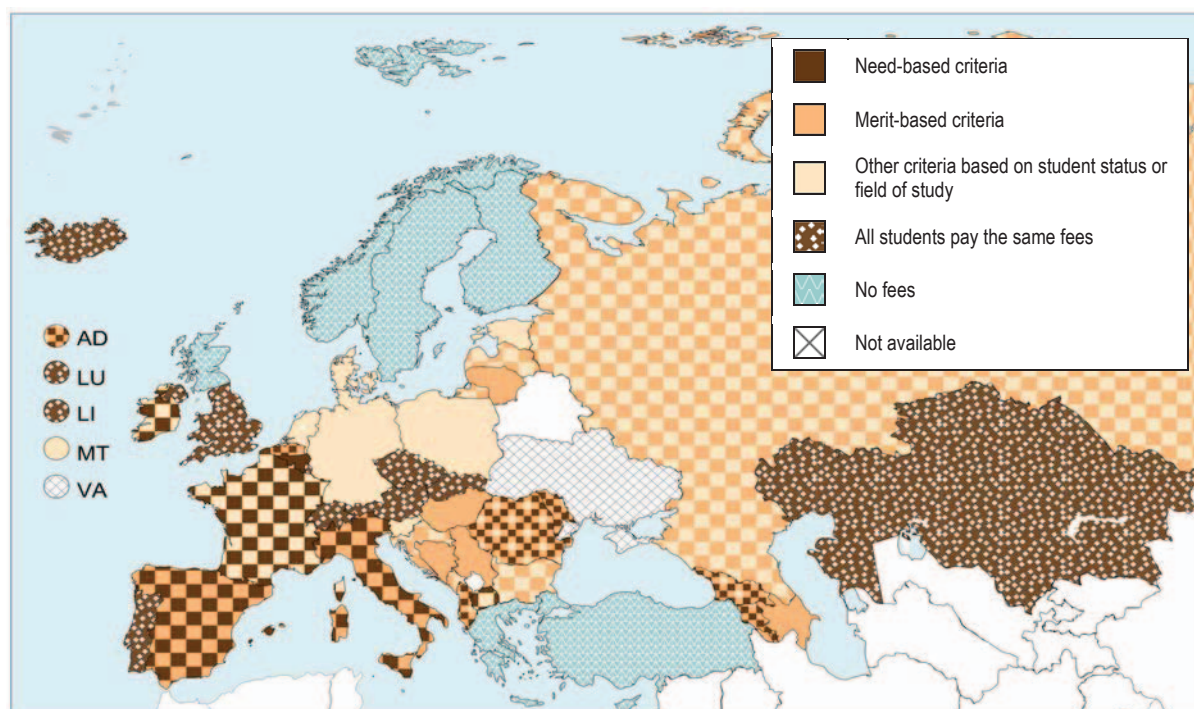
Source: EUROSTUDENT V, G.13.

Who pays fees?

But who are these fee-paying students? What are the criteria used to determine that some students pay fees and others do not, or to decide the amounts that are paid? Figure 4.16 depicts the main criteria used in the case of home students as the basis for such decisions across the EHEA. The two most common criteria are academic merit and student status (full-time students, part-time students or distant learners), followed by criteria based on the field of study and need-based criteria.

(registration) fees can be so low that not all students perceive them as fees (e.g. in the Czech Republic).

Figure 4.16: Criteria for determining fee-payers and/or the amount of fees they need to pay, 2013/14



Source: BFUG questionnaire

Regarding students' status, this criterion usually implies that students of a certain status have to pay (higher) fees while others are exempt from fee-paying or pay lower fees. As Figure 5.5 will show, most typically this implies (higher) fees for part-time students or distance learners, while full-time students pay lower fees or, as for example in Denmark, no fees at all.

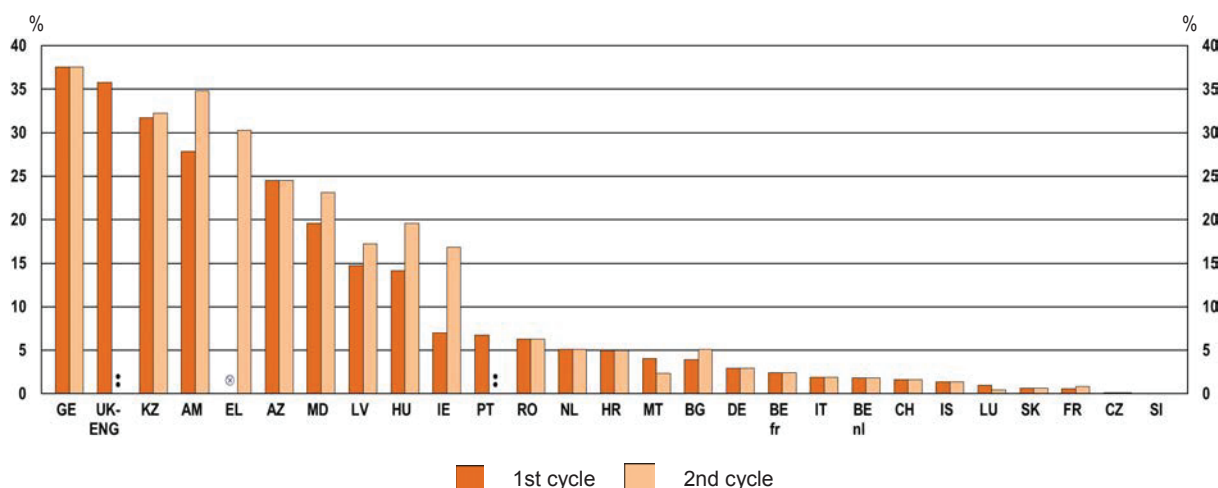
Criteria based on field of study are applied in Andorra, Armenia, Belgium (French Community), France, "The former Yugoslav Republic of Macedonia", Georgia, Latvia, Malta, Moldova and Montenegro. In France, for example, second cycle students in the fields of engineering and health pay higher fees.

The amount of fees and the financial burden of households

Comparable information on the actual financial burden on students and their families has three main sources. First, countries were asked to give their most common, minimum and maximum amount of yearly fees during the data collection for this report (presented in Figures 4.17 and 4.18). Second, information from the Eurostudent survey concerns the amount of monthly fees charged for Bachelor and Master students not living with their parents (Figures 4.19 and 4.20). Third, Eurostat data are available on the financial contribution to higher education from household funding (Figure 4.21). Based on these data sources, a more complete picture can be presented regarding fees across the EHEA.

Figure 4.17 presents the most common amount of yearly fees in the first and second cycle as percentages of GDP per capita (2013 value) for countries where data were available. As the figure shows, where there is a difference between the cycles, typically second cycle students pay more fees than first cycle students (except in Malta and Luxembourg). The biggest difference between the cycles is in Ireland.

Figure 4.17: Most common amount of yearly fees for full-time students as a percentage of GDP per capita, 2013/14



	GE	UK-ENG	KZ	AM	EL	AZ	MD	LV	HU	IE	PT	RO	NL	HR
1st cycle	37.6	35.8	31.7	27.9	no fees	24.5	19.6	14.8	14.1	7.0	6.7	6.3	5.1	5.0
2nd cycle	37.6	:	32.3	34.8	30.3	24.5	23.2	17.2	19.6	16.8	:	6.3	5.1	5.0
	MT	BG	DE	BE fr	IT	BE nl	CH	IS	LU	SK	FR	CZ	SI	
1st cycle	4.1	3.9	2.9	2.4	1.9	1.8	1.6	1.4	1.0	0.6	0.6	0.1	0.0	
2nd cycle	2.3	5.1	2.9	2.4	1.9	1.8	1.6	1.4	0.5	0.6	0.8	0.1	0.0	

Notes:

Data are sorted based on yearly fees in the first cycle.

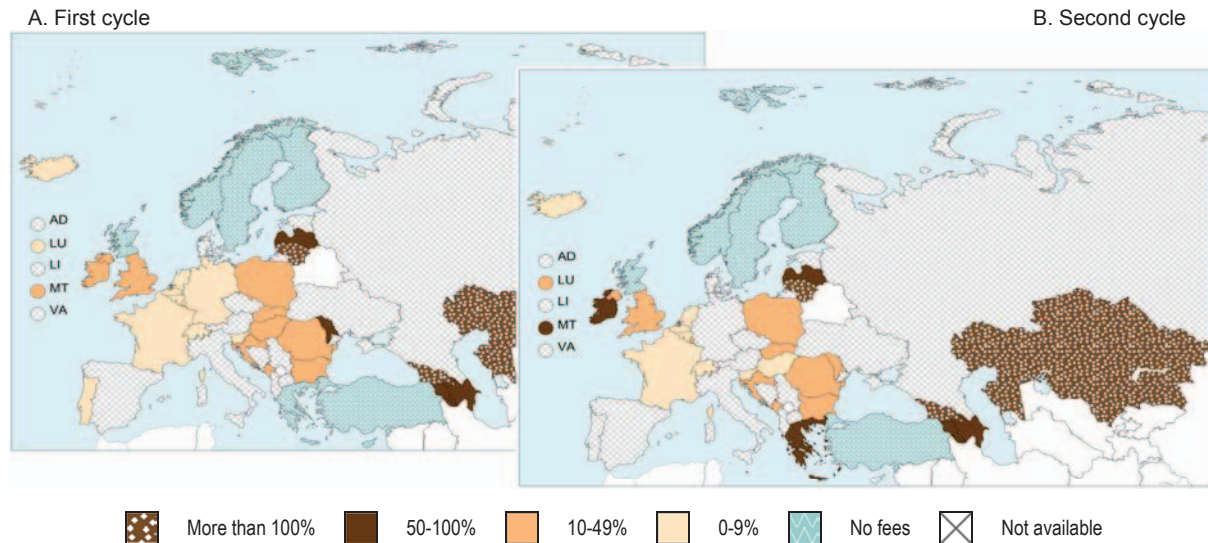
Source: BFUG questionnaire and World Bank

Relative to the countries' GDP per capita, the highest fees for first cycle students can be found in Georgia, the United Kingdom (England, Wales and Northern Ireland), Kazakhstan, Armenia and Azerbaijan. In all these countries, students typically have to pay more than 20 % of the country's GDP per capita in both cycles. In Greece and Moldova, fees exceed 20 % of the country's GDP per capita in the second cycle. However, besides Greece and the United Kingdom, these are all countries with relatively low GDP per capita, which can partly explain the relatively large burden on students.

The maximum amount of fees students can potentially pay are categorised in Figure 4.18. The maximum amounts of fees are higher for second cycle students in Armenia, Azerbaijan, Bulgaria, Greece, Ireland, Kazakhstan, Latvia, Luxembourg, Malta and Montenegro; while first cycle students can potentially be charged more in Hungary, Lithuania and Moldova. As the figure also depicts, some students can pay more than 100 % of the GDP per capita in Georgia, Kazakhstan and Lithuania in both cycles. For example, in Lithuania, while the maximum amount of fees that can be charged to students is 72 000 LTL in the first cycle and 43 000 LTL in the second cycle, the GDP per capita of the country was 40 414 LTL in 2013 in current prices ⁽¹⁷⁾.

(17) Source of data on GDP per capita: World Bank (see: <http://data.worldbank.org/indicator/NY.GDP.PCAP.CN>).

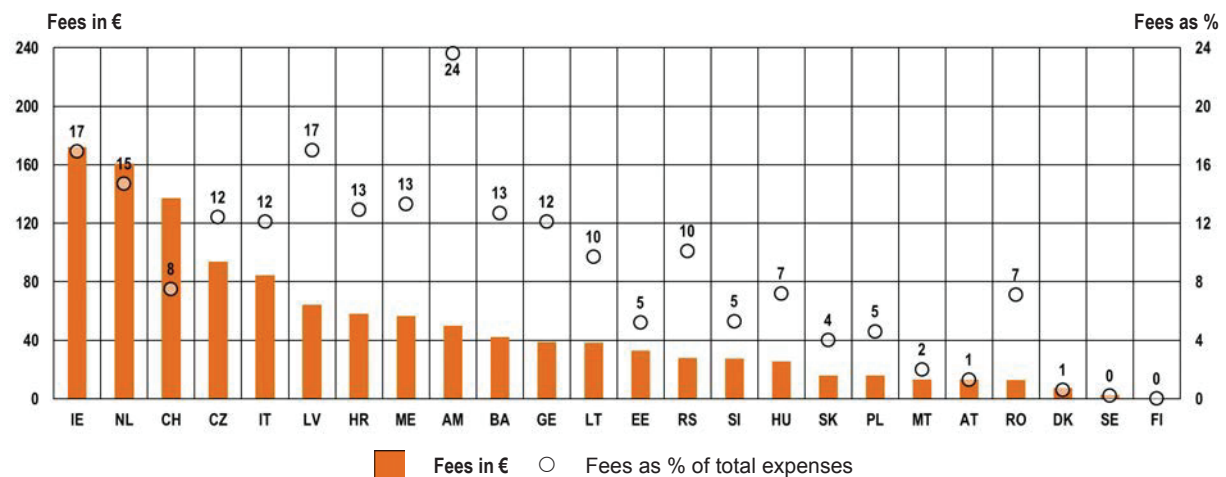
Figure 4.18: Maximum amount of yearly fees for full-time students as a percentage of GDP per capita, 2013/14



Source: BFUG questionnaire and World Bank

Another way to look at the amount of fees students have to pay is to examine their monthly fees as a percentage of their monthly expenses. Based on the Eurostudent survey, Figures 4.19 and 4.20 show the monthly fees ⁽¹⁸⁾ for Bachelor and Master students not living with their parents in euros and as a percentage of their total monthly expenses. In line with Figure 4.17, these figures show that fees take up a relatively large part of monthly expenses for students in Armenia, Ireland and Latvia in the first cycle; and in Armenia, Montenegro, Ireland and Bosnia and Herzegovina in the second cycle.

Figure 4.19: Monthly fees for Bachelor students not living with their parents, in euro and in % of total monthly expenses, 2013/14



Notes:

EUROSTUDENT Question(s): 3.7. What are your average expenses for the following items during the current semester?

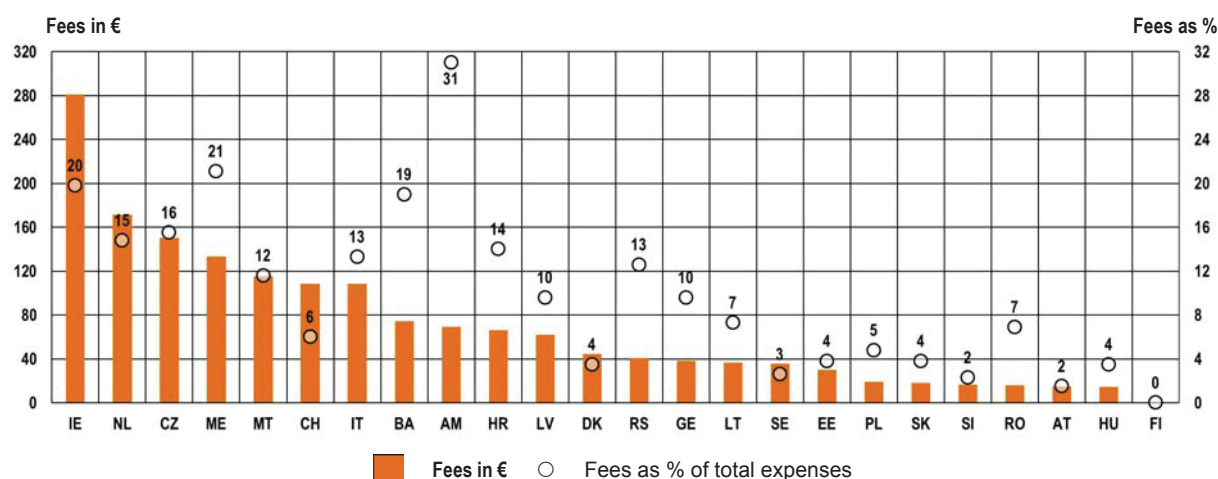
No data is available for Germany, France, Russia and Ukraine.

Deviations from EUROSTUDENT survey conventions: Germany, France and Italy. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro and Romania.

Source: EUROSTUDENT V, F.2.

⁽¹⁸⁾ Fees shown in the figure cover four different types of expenses: a) tuition fees, b) registration fees, c) examination fees and d) administrative fees. Fees are often paid per semester and any study-related expenses were recorded in the Eurostudent questionnaire as cost per semester. However, for all analyses all study-related cost was re-calculated as per-month-expenses.

Figure 4.20: Monthly fees for Master students not living with their parents, in euro and in % of total monthly expenses, 2013/14



Notes:

EUROSTUDENT Question(s): 3.7. What are your average expenses for the following items during the current semester?

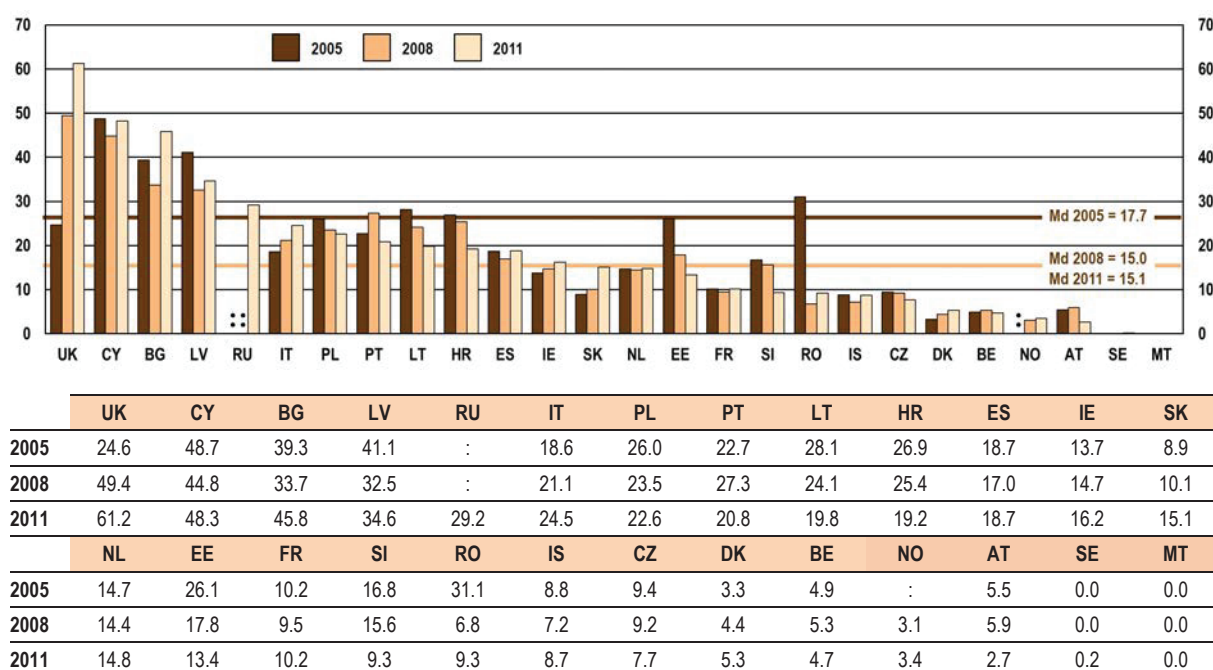
No data is available for Germany, France, Russia and Ukraine.

Deviations from EUROSTUDENT survey conventions: Germany, France and Italy. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro and Romania.

Source: EUROSTUDENT V, F.2.

The financial contribution to higher education from household funding in 2005, 2008 and 2011 is depicted on Figure 4.21. The figure reflects the situation and relevant changes in relation to three main factors. First, fluctuations in the household funding for higher education reflect changes in fee policies over the period covered. Second, the share of household funding changes also if funding for higher education from other sources (mainly from the public budget) increases or decreases. Finally, if public funding remains constant (which is the case of most countries in the post-crisis period), the higher the number of students, the larger becomes the share of household funding for higher education. Therefore, this indicator needs to be interpreted with caution.

Figure 4.21: Share of total expenditure for higher education institutions from household funding, 2005, 2008, 2011



Notes:

Data are sorted by share of total expenditure for higher education institutions from household funding in 2011.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

Figure 4.21 shows that the share of household funding for tertiary education is the largest in the United Kingdom (over 60 %), followed by Cyprus and Bulgaria (over 45 %), and then Latvia (34 %). Households contribute to around 5 % or less of tertiary education expenditure in Denmark, Belgium, Norway, Austria, Sweden and Malta.

Regarding the latest changes, at the level of the EHEA, the situation in 2008 and 2011 was roughly similar, not because the situation is stable, but rather because increases of household funding in some countries are offset by decreases in others. The largest increase in the share of household funding was registered in the United Kingdom, where the share of total expenditure for higher education institutions from household funding doubled between 2005 and 2008, and increased by a further 24 % until 2011. These changes are mostly due to the raise of the tuition cap in England, Wales and Northern Ireland in the academic year 2006/07, but also reflect a decrease in public expenditure for higher education between 2010 and 2011 (see Figure 1.9).

The relative contribution of private households increased in other countries as well, although at a much lower level. Between 2008 and 2011, Slovakia saw an increase of household contributions by 50 %, Romania by 37 % (this, however, followed a large decrease between 2005 and 2008), and Bulgaria by 36 %. In these countries, this is mostly due to decreases in public expenditure on tertiary education (see Chapter 1).

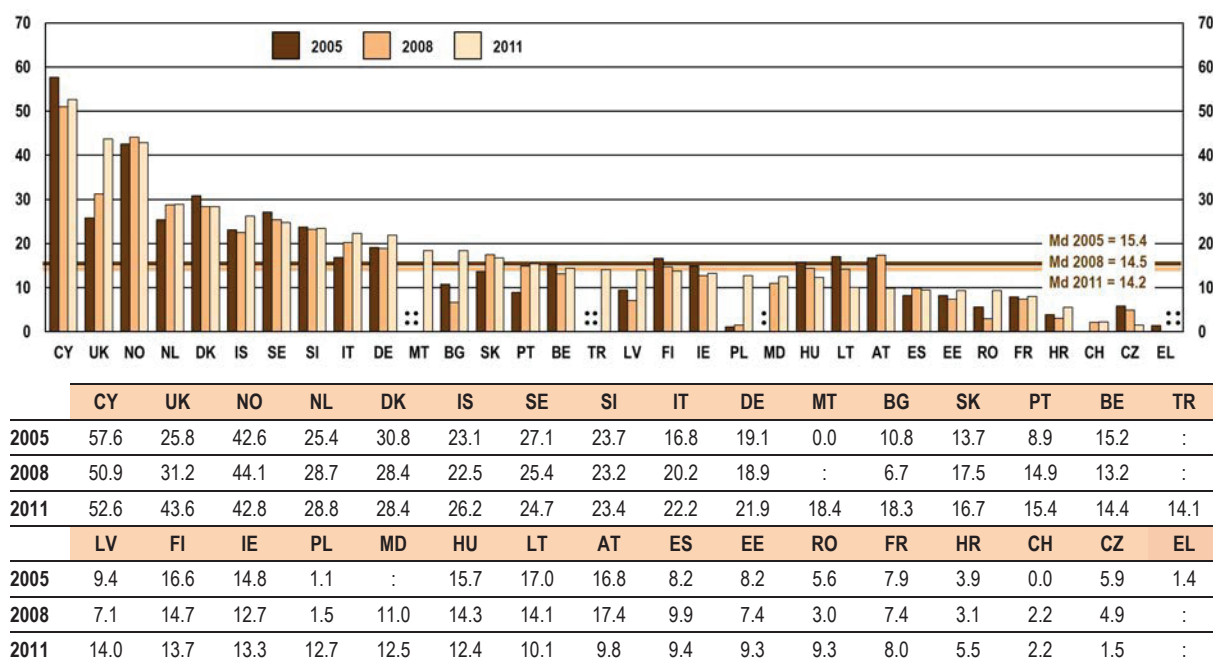
Countries with the largest decrease in the share of household expenditure between 2008 and 2011 were Austria, which saw a decrease by more than 50 %, Slovenia (by 40 %), Estonia (by 25 %) and Croatia (by 24 %). In Austria, the change may be linked to the abolition of tuition fees in 2008. In Slovenia and Estonia, however, these changes could be linked to increases in public expenditure (see Figure 1.9).

4.4.2. Student income and public support

Providing financial support from public funds to students is an important support measure enabling them to start and continue studying in higher education. Students from certain underrepresented groups may be especially affected by the level of student support. Financial assistance to students can take many forms: the most common form across the EHEA at the moment is public grants, but publicly subsidised loans, tax benefits to parents, family allowances or other forms of indirect support to students are also significant in a number of systems.

Figure 4.22 shows how student support has developed over recent years, indicating the share of public funding for higher education spent on financial support to students in 2005, 2008 and 2011. Again, this indicator needs to be interpreted with caution. First, different forms of student support might come from other sources in the public budget than the public expenditure on higher education. In addition, the mere sum of financial support does not take into account (indirect) student support in kind, such as dormitories or refectories supporting students by supplying affordable accommodation and meals. Another important caveat is that an increasing share of student support does not necessarily imply an increasing level of support; it can also be the result of a decrease in the total public expenditure on higher education.

Figure 4.22: Support to students enrolled at tertiary education level as a percentage of public expenditure on tertiary education (2005 - 2008 - 2011)



Notes:

Poland: new method for data collection since 2010.

Data are sorted by support to students enrolled in tertiary education as a percentage of public expenditure on tertiary education in 2011.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

As Figure 4.22 depicts, student support accounts for the greatest share of public tertiary education expenditure in Cyprus (over 50 %), the United Kingdom and Norway (over 40 %). As was shown above, such high proportions of public student support should be seen alongside a large share of household contributions in the United Kingdom and Cyprus. However, in Norway, students are supported without themselves making a significant contribution to tertiary education expenditure.

In 2011, the percentage of student support within public expenditure on tertiary education was the lowest in Croatia (5.5 %), Switzerland (2.2 %) and the Czech Republic (1.5 %).

Similarly to the indicator on the share of household funding, the share of support to higher education students in public expenditure remained more or less constant within the EHEA as a whole between 2008 and 2011. However, significant changes occurred in some countries.

In Romania and Bulgaria, after decreases between 2005 and 2008, the share of student support within public higher education expenditure nearly tripled between 2008 and 2011. As was shown above, the share of household expenditure for higher education also increased in this period in the two countries. This could potentially mean that households' increased contribution was offset by an increase in public student support. However, data shows that public expenditure on tertiary education decreased in both countries in this period, which could also be an indication for constant student support within decreased education expenditure.

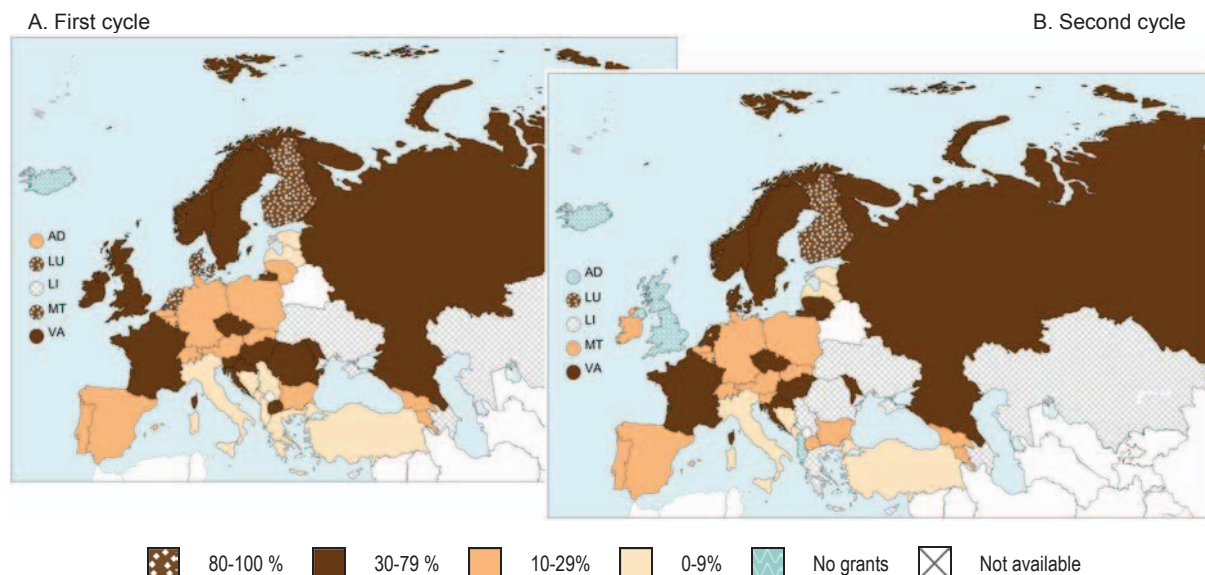
Forms and coverage of student support

As was discussed above, for the current report, student support includes public grants, publicly subsidised loans, tax benefits for parents and family allowances. Among these different forms of student support, grants are generally considered as the most generous and direct form of public

student support as, unlike loans, the funding provided does not need to be paid back, and unlike tax benefits or family allowances the payment is made directly to the student.

Students – or at least some students - receive grants/scholarships in all EHEA countries except Iceland. Mainstream grants and scholarships are only available for first cycle students in Albania, Andorra and the United Kingdom. Figure 4.23 depicts the proportion of students receiving grants. The information presented on the map concerns all home students and/or students who are considered under the same fee regime as home students.

Figure 4.23: Proportion of students receiving grants/scholarships, 2013/14



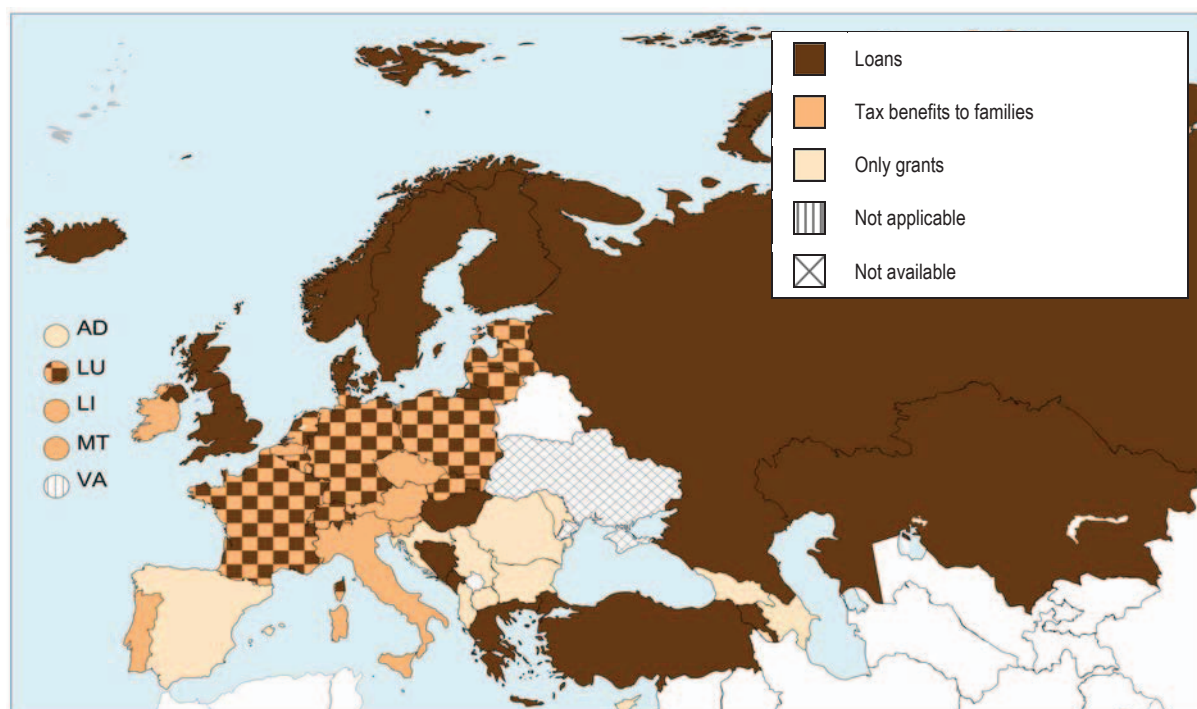
Source: BFUG questionnaire.

Among the countries where data are available, 80 % or more first cycle students receive grants/scholarships in Denmark, Finland, Luxembourg, Malta, the Netherlands and the United Kingdom (England, Wales and Northern Ireland).

Regarding the second cycle, though data are less available, the proportion of students receiving grants is generally smaller than for the first cycle. The only two countries where more than 80 % of students receive scholarships are Finland (90 %) and Luxembourg (100 %). As was shown on Figures 4.17 to 4.20, second cycle students also tend to pay higher fees than do first cycle students. This pattern points towards an important difference between the cycles: EHEA countries tend to regard first cycle studies more as a public responsibility and provide less public resources for the second cycle. Nevertheless, some countries might as well apply the opposite logic, rewarding second cycle students more. For example, in Hungary and Lithuania, more student support is devoted to second cycle students who also tend to pay lower fees.

As Figure 4.24 shows, in 12 education systems, only grants are available for students. Loans exist in 26 education systems in the EHEA, most often in combination with grants (except in Iceland). Students' parents or families receive tax benefits in 20 education systems. All three forms of student support are available in Belgium (French Community), Estonia, Germany, France, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Slovakia and Switzerland.

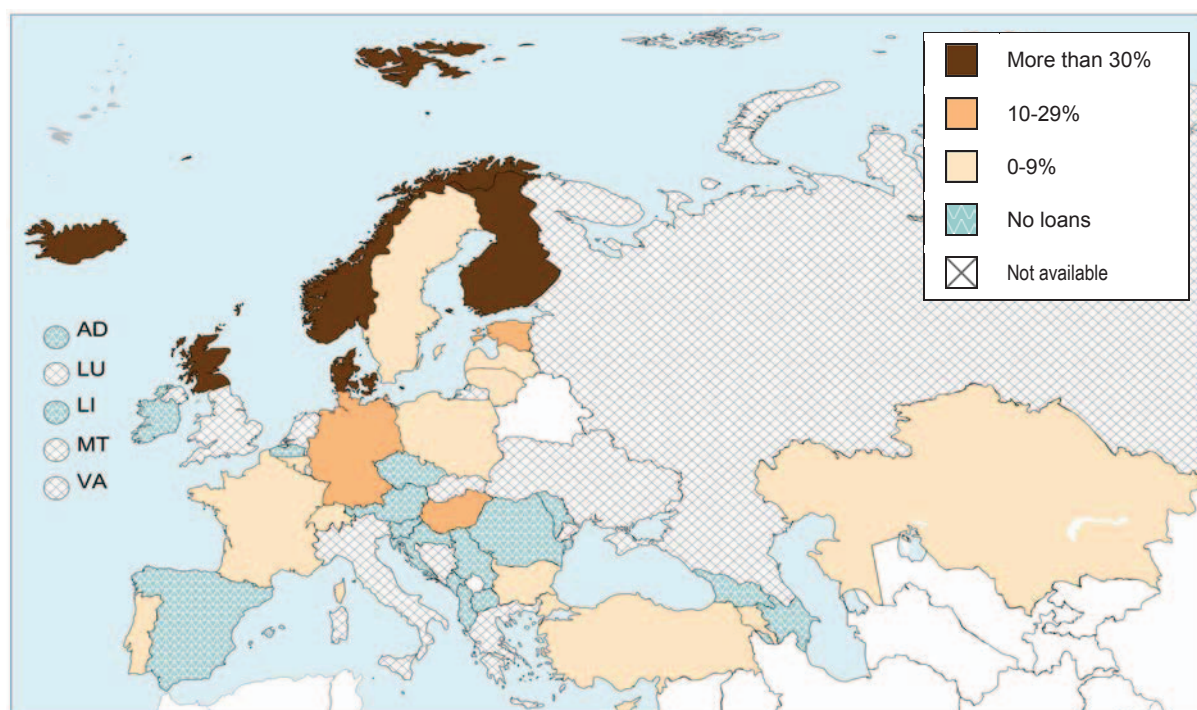
Figure 4.24: Student support in the form of loans and tax benefits, 2013/14



Source: BFUG questionnaire.

Information is limited regarding the proportion of students taking out loans (Figure 4.25). Among the countries where data are available, more than 30 % of students take out loans in Denmark, Finland, Iceland, Norway and the United Kingdom (Scotland).

Figure 4.25: Proportion of students taking out loans (both cycles combined), 2013/14



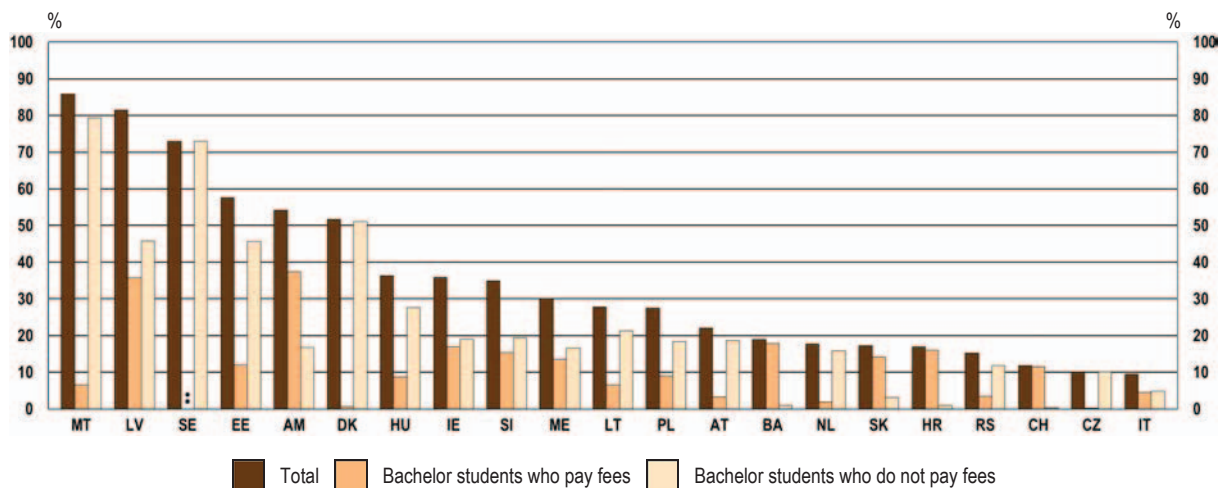
Source: BFUG questionnaire.

Fees and student support

Based on the Eurostudent survey, data are also available on the proportion of fee-payers among the recipients (Figure 4.26) and non-recipients (Figure 4.27) of public support. This is important to look at in order to see to what extent there is a relationship between the payment of fees and the reception of public support for students studying in the first cycle (Bachelor students).

In general in the EHEA, there does not seem to be a clear pattern regarding the relationship between the payment of fees and the reception of support. In several countries where the percentage of fee-payers is high, fee-payers are over-represented among both the recipients and the non-recipients of public support. This means that fee-payers are not more or less likely to receive support than non-fee-payers. In other words, different criteria determine who pays fees and who gets public support. Such countries include Armenia, Slovakia and Croatia. On the other hand, there are also countries with relatively high percentage of fee-payers where Bachelor students not paying fees are more likely to receive support. In these countries (e.g. in Ireland), criteria determining fee-paying and the reception of support are more likely to coincide.

Figure 4.26: Percentage of fee-payers among recipients of public support, 2013/14



	MT	LV	SE	EE	AM	DK	HU	IE	SI	ME	LT	PL	AT	BA	NL	SK	HR	RS	CH	CZ	IT
Total	85.9	81.5	72.9	57.6	54.2	51.7	36.4	35.9	34.9	30.2	27.8	27.5	22.0	18.9	17.7	17.3	16.9	15.2	11.8	10.2	9.5
Who pay fees	6.6	35.7	:	12.0	37.4	0.6	8.8	16.9	15.4	13.6	6.5	9.1	3.3	17.9	1.9	14.1	16.0	3.4	11.5	0.1	4.6
Who do not pay fees	79.3	45.8	72.9	45.6	16.8	51.1	27.6	19.0	19.5	16.6	21.3	18.4	18.7	1.0	15.8	3.2	0.9	11.8	0.3	10.1	4.9

Notes:

EUROSTUDENT Question(s): 3.7. What are your average expenses for the following items during the current semester?

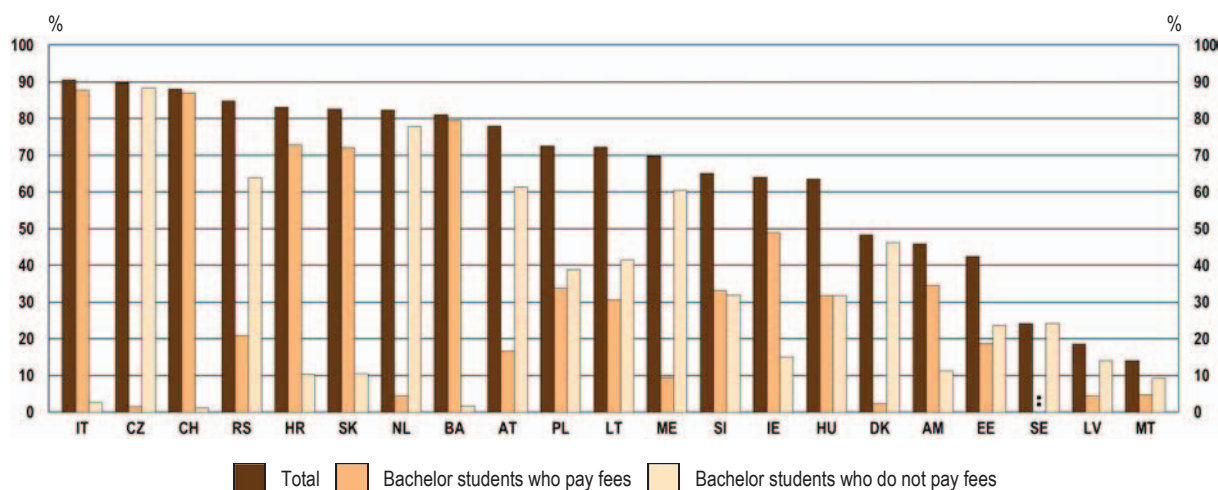
No data is available for Germany, Finland, France, Georgia, Romania, Russia and Ukraine. Too few cases for BA students who pay fees: Sweden.

Deviations from EUROSTUDENT survey conventions: France. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro, and Romania.

Czech Republic: the amount of registration fees is so low that not all students perceive them as fees.

Source: EUROSTUDENT V, G.13.

Figure 4.27: Percentage of fee-payers among non-recipients of public support, 2013/14



	IT	CZ	CH	RS	HR	SK	NL	BA	AT	PL	LT	ME	SI	IE	HU	DK	AM	EE	SE	LV	MT
Total	90.6	89.8	88.1	84.8	83.1	82.6	82.3	81.1	78.0	72.6	72.2	69.8	65.1	64.0	63.6	48.4	45.8	42.4	24.1	18.5	14.1
Who pay fees	87.8	1.5	86.9	20.9	72.8	72.1	4.5	79.5	16.7	33.7	30.7	9.4	33.2	49.0	31.8	2.3	34.5	18.7	:	4.5	4.8
Who do not pay fees	2.8	88.3	1.2	63.9	10.3	10.5	77.8	1.6	61.3	38.9	41.5	60.4	31.9	15.0	31.8	46.1	11.3	23.7	24.1	14	9.3

Notes:

EUROSTUDENT Question(s): 3.7. What are your average expenses for the following items during the current semester?

No data is available for Germany, Finland, France, Georgia, Romania, Russia and Ukraine. Too few cases for BA students who pay fees: Sweden.

Deviations from EUROSTUDENT survey conventions: France. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro, and Romania.

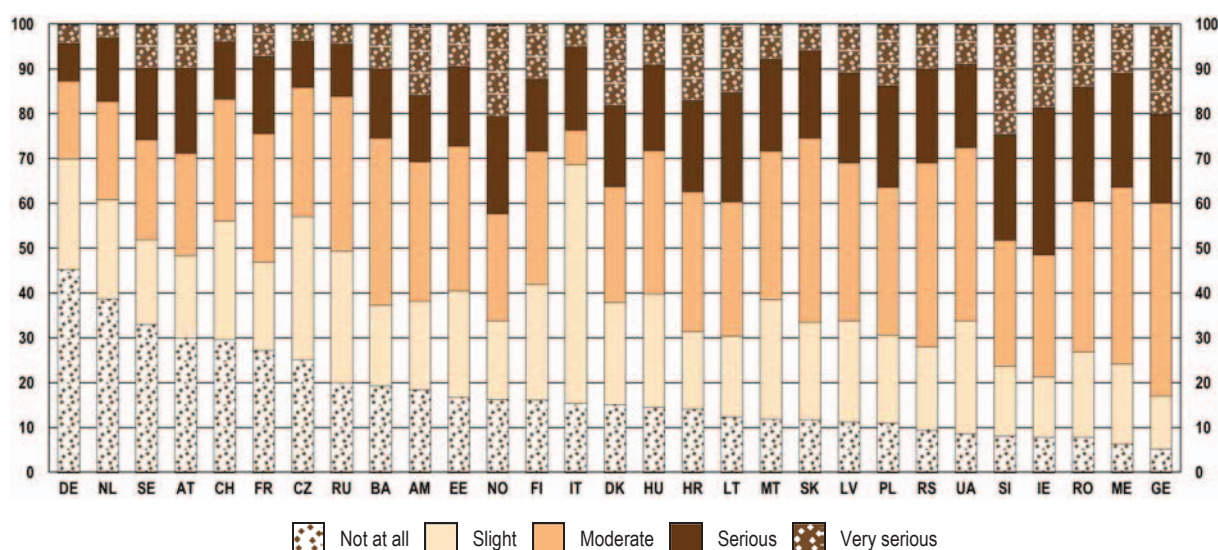
Czech Republic: the amount of registration fees is so low that not all students perceive them as fees.

Source: EUROSTUDENT V, G.13.

Student perceptions on the sufficiency of funding

Students' assessment on their financial difficulties (Figures 4.28 and 4.29) also provides additional information on the adequacy of public support. As Figure 4.28 shows, in the majority of countries with available data, the most common assessment students made on their financial situation is that they are in moderate financial difficulty.

Figure 4.28: Students' assessment of the extent of current financial difficulties (%), 2013/14



	DE	NL	SE	AT	CH	FR	CZ	RU	BA	AM	EE	NO	FI	IT	DK
Not at all	45.3	38.8	33.1	30.1	29.7	27.3	25.2	20	19.4	18.5	16.9	16.4	16.2	15.5	15.2
Slight	24.7	22.1	18.9	18.3	26.4	19.6	32	29.4	18.0	19.8	23.6	17.4	25.8	53.2	22.8
Moderate	17.3	21.9	22.3	22.9	27.2	28.8	28.8	34.5	37.3	31.1	32.4	24.0	29.7	7.7	25.8
Serious	8.5	14.3	16.0	19.0	12.9	17.2	10.3	11.8	15.4	14.8	17.7	21.8	16.2	18.7	18.1
Very serious	4.2	2.9	9.7	9.8	3.8	7.2	3.6	4.3	9.8	15.8	9.5	20.4	12.2	4.9	18.1
	HU	HR	LT	MT	SK	LV	PL	RS	UA	SI	IE	RO	ME	GE	
Not at all	14.6	14.2	12.5	12.0	11.8	11.3	11.1	9.5	8.7	8.2	7.9	7.9	6.4	5.3	
Slight	25.3	17.2	18.0	26.6	21.8	22.5	19.6	18.6	25.2	15.6	13.5	19.0	17.9	11.8	
Moderate	32.0	31.3	29.9	33.1	41.1	35.3	33.0	41.0	38.6	28.0	27.2	33.7	39.4	43.1	
Serious	19.1	20.4	24.4	20.6	19.4	20.2	22.7	21.0	18.6	23.7	32.9	25.5	25.4	19.8	
Very serious	9.0	16.9	15.2	7.7	5.9	10.7	13.6	9.9	8.9	24.4	18.5	13.9	11.0	20.1	

Notes:

EUROSTUDENT Question(s): To what extent are you currently experiencing financial difficulties?

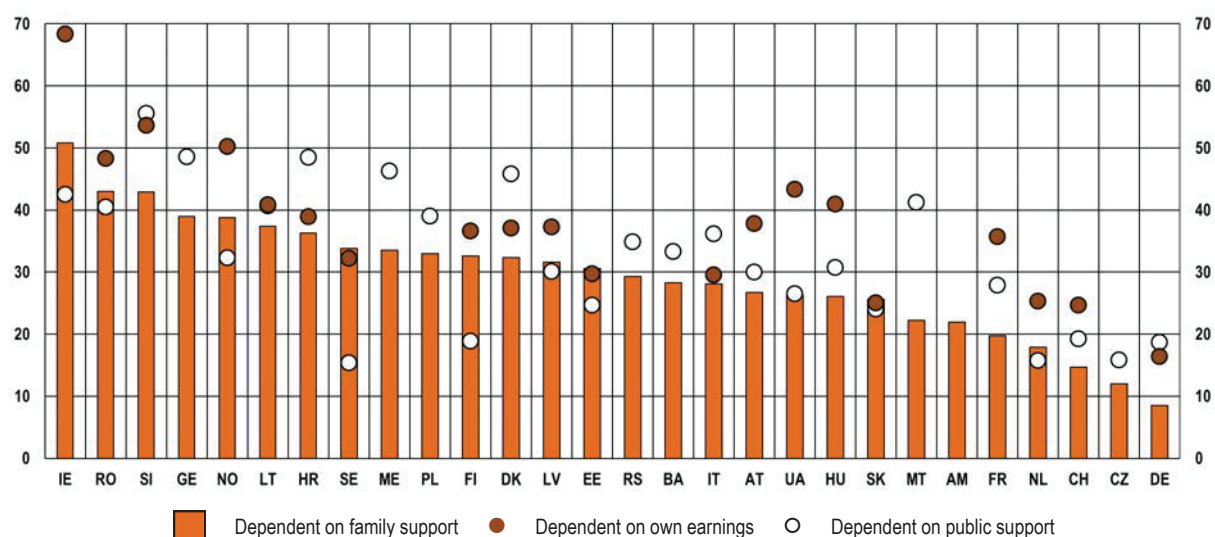
Deviations from EUROSTUDENT survey conventions: Germany, Norway. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro and Romania.

Source: EUROSTUDENT V, F.6.

The exceptions are, on the one hand, Germany, the Netherlands, Sweden, Austria, Switzerland and Italy, where many students have only slight financial difficulties or not at all, and on the other hand Ireland, where many students feel that they face serious difficulties. The countries where around 40 % or more of students have serious or very serious financial difficulties are Ireland, Slovenia, Norway, Romania and Georgia.

Figure 4.29 depicts students' assessment of the extent of their financial difficulties. The figure distinguishes between different categories of students not living with their parents: students dependent on family support, on their own earnings and on public support. Dependency means that the respective income source amounts to more than 50 % of the students' total income. As the figure shows, students dependent on public support generally face bigger difficulties than their peers dependent on their own earnings or receiving family support, which shows that student support is not sufficient for covering students' costs in the majority of countries.

Figure 4.29: Students' assessment of the extent of current financial difficulties by finance-related characteristics of students not living with parents, % of students with (very) serious difficulties, 2013/14



Notes:

EUROSTUDENT Question(s): To what extent are you currently experiencing financial difficulties?

No data: Russia. No data for students dependent on public support: Georgia, Poland. Too few cases: For students dependent on own earnings: Armenia; for students dependent on public support: Armenia, Bosnia and Herzegovina, the Czech Republic, Montenegro, Malta, and Serbia.

Values above the country abbreviations present the percentage for students dependent on family support. For Lithuania the

values for "dependent on own earnings" and "dependent on public support" are almost identical. Therefore, only one icon can be viewed in the figure.

Deviations from EUROSTUDENT survey conventions: Germany, Italy and Norway. Deviations from EUROSTUDENT standard target group: Germany, Georgia, Italy, Montenegro and Romania.

Source: EUROSTUDENT V, F.9.

Based on the adequacy of the main sources of income, three groups of countries can be distinguished among those where all data are available. In the first – and biggest – group of countries, public support is evaluated to be the least adequate to cover the costs of students (in some cases along with family support), while students dependent on earnings are the least likely to have financial difficulties. These countries are Ireland, Romania, Norway, Sweden, Finland, Latvia, Estonia, Slovakia and the Netherlands.

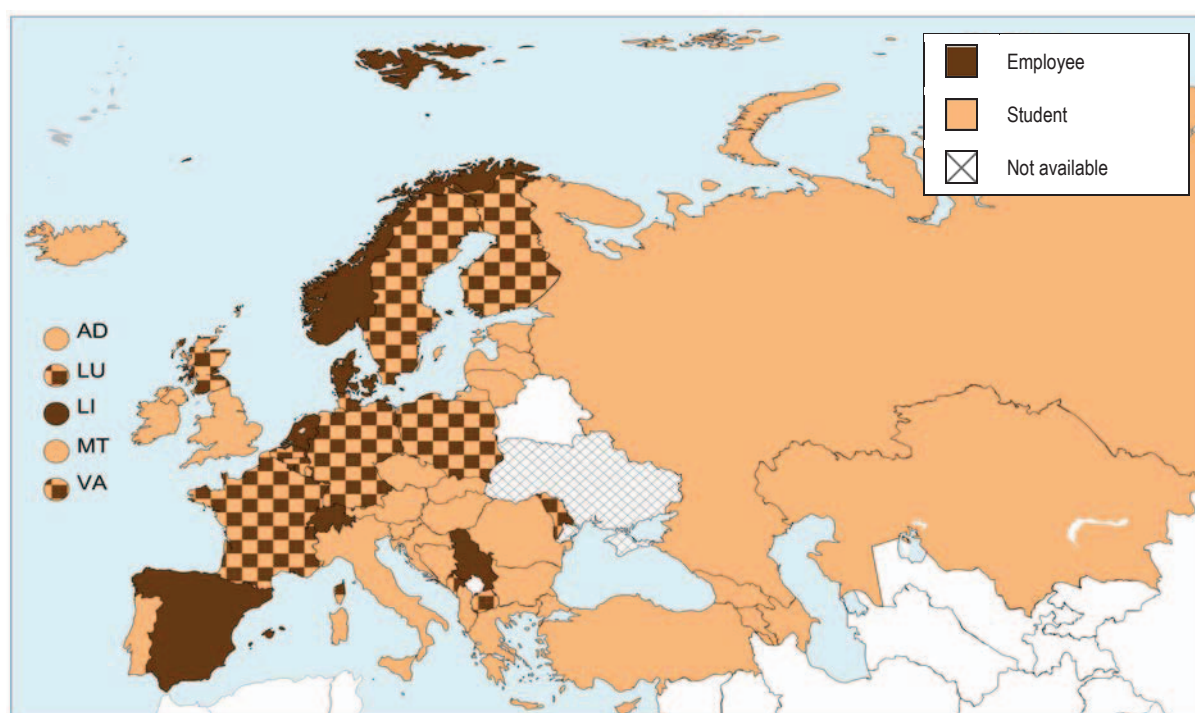
In the second group, while public support is still the perceived as the least adequate to cover the costs of an average student, earnings are not suitable to get students out of financial difficulties either. Such countries include Austria, Ukraine, Hungary, France and Switzerland.

Finally, in the third group of countries including Slovenia, Croatia, Denmark, Italy and Germany, students dependent on their own earnings face the greatest financial difficulties. In addition, students receiving public support are still worse off than their peers receiving support from their families.

4.4.3. Fees and financial support in the third cycle

The third cycle is often very different from the first and the second in terms of fees and financial support. Countries often apply a different logic when it comes to financing third cycle doctoral candidates. Certainly, fees and financial support for doctoral candidates depends partly on the status that they have in their institutions: those having a student status are more similar to first and second cycle students than those having an employment contract with their institutions. As Figure 4.30 shows, in the large majority of countries, doctoral candidates have a student status, while they have an employment contract – most often with the higher education institutions, but in some cases with other organisations – in seven education systems. In thirteen systems, the two statuses coexist.

Figure 4.30: Status of doctoral candidates, 2013/14

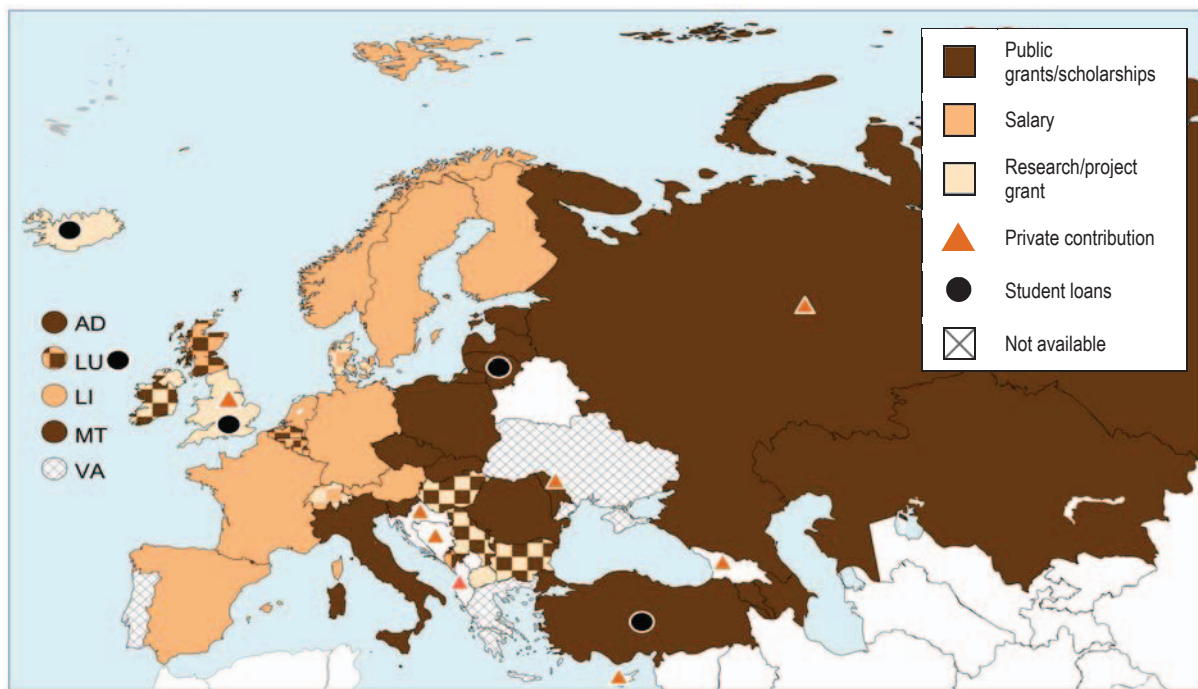


Source: BFUG questionnaire.

When it comes to fees required to be paid by doctoral candidates, differentiations between the cycles often exist. In some cases, doctoral candidates pay lower fees than first and second cycle students (e.g. in Belgium, Bulgaria ⁽¹⁹⁾, Estonia, Romania and Switzerland). In Armenia, Azerbaijan, Croatia, France and Latvia on the other hand, third cycle doctoral candidates pay higher fees than students in the first two cycles. The same fee levels are reported to exist for all the three cycles in Andorra, Bosnia and Herzegovina, Germany, Georgia, Hungary, Iceland, Liechtenstein, Luxembourg, and Russia.

Examining the main sources of funding for doctoral candidates highlights very diverse realities within the EHEA (Figure 4.31). Public grants and scholarships are available for third cycle (PhD) students in the majority of education systems under a variety of conditions, partly linked to status. When doctoral students receive public grants or scholarships, these are usually the same as or higher than those received by first and second cycle students (higher scholarships for doctoral candidates exist e.g. in Belgium (Flemish Community), Germany, Estonia, Hungary, Latvia or Turkey). Doctoral candidates receive a salary as employees in 16 education systems. They also often benefit from project-based research grants (in ten education systems). Students' (or their employers') contributions constitute their main source of funding in eight education systems. Student loans are among the main sources of funding in Iceland, Lithuania, Luxembourg, Turkey and the United Kingdom (England, Wales and Northern Ireland).

Figure 4.31: Main sources of funding for doctoral candidates, 2013/14



⁽¹⁹⁾ While doctoral candidates pay higher fees in their first year, they are exempt from fee-paying in later years.

Conclusions

Drawing upon statistical data, the results of the BFUG questionnaire and the latest Eurostudent report, this chapter has focused on the social dimension of the Bologna Process and its goal that the student body should reflect the diversity of the populations and that the background of students should not have an impact on their participation in and attainment of higher education.

While some progress can be noted, the analysis clearly shows that the goal of providing equal opportunities to quality higher education is far from being reached.

With regard to gender, some imbalances have reduced over time but nevertheless continue to exist in most countries and across the EHEA as a whole. Women are overrepresented in the total student population and in new entrants in nearly all countries.

At the level of doctoral education the picture is mixed: in four countries the shares of men and women entering doctoral education are more or less equal; in 12 countries men are underrepresented, in 14 countries women are underrepresented. The shares of women entering doctoral education vary from 41 % in Turkey to 60 % in Iceland.

The greatest gender imbalances exist, however, between different fields of study. In some fields, such as teacher training or social services, men are strongly underrepresented. In other fields, such as computing or engineering, women are strongly underrepresented. Policies aimed at achieving gender balance in higher education are therefore likely to be most effective if they take study-field-specific imbalances into account.

Another central concern of the social dimension is whether immigrants and children of immigrants have the same chances to participate in and attain higher education as native students. Such information is, however, much more difficult to gather, which is why the present chapter uses data on foreign-born students as proxy. This data shows very clearly that in nearly all countries, an immigration background is negatively associated with higher education attainment. Foreign-born young adults are more likely to quit education and training at an early stage and less likely to participate in tertiary education than their native-born counterparts.

Similarly, the educational background of parents continues to have an impact on tertiary education attainment. In all EHEA countries for which data is available, children of medium educated parents have much lower chances to attain tertiary education than children of highly educated parents.

Being aware of those (and other) imbalances, almost all higher education systems reflect the objective of widening participation in their higher education policy and more than 70 % of the systems claim to do so through a set of concrete measures.

Despite the commitment in the Leuven/Louvain-la-Neuve Communiqué of 2009 to set 'measurable targets for widening overall participation and increasing participation of underrepresented groups in higher education, to be reached by the end of the [...] decade' ⁽²⁰⁾, less than 20 % of the systems have defined quantitative objectives with a reference to underrepresented groups. More common are targets for increasing overall participation – 30 of the 48 systems for which data is available have at least one such target, in most cases related to the European Union's Europe 2020 strategy and its target that by 2020 at least 40 % of young people (aged 30-34) should have completed tertiary or

⁽²⁰⁾ Leuven/Louvain-la-Neuve Communiqué: The Bologna Process 2020 - The European Higher Education Area in the new decade. Communiqué of the Conference of European Ministers Responsible for Higher Education, Leuven and Louvain-la-Neuve, 28-29 April 2009.

equivalent education. However, whether increasing overall participation will also result in a more balanced composition of the student body remains to be seen.

In more than 90 % of the higher education systems in the EHEA the composition of the student body is subject to some kind of systematic monitoring. In many cases, however, the monitoring covers only a limited number of characteristics, such as age, gender and type and level of qualification achieved prior to entry to higher education. Other characteristics, such as disability, migrant status or labour market status prior to entry to higher education, are monitored to a much lesser degree.

To be able to identify underrepresented groups and to assess whether measures to widen participation in higher education have the desired effect, it may be advisable for the monitoring of the composition of the student body to take into account a wider range of characteristics related to the social dimension goal and also to establish a closer link between monitoring and policy-making.

As far as alternative access to higher education is concerned, the overall picture across the EHEA looks very similar to the situation described in the previous implementation report. In 22 higher education systems (most of them in Western Europe) at least one such alternative route to higher education exists, while in the remaining 25 systems for which data is available access to higher education still depends on the possession of an upper secondary school leaving certificate (general or vocational).

Concerning the recognition of prior non-formal and informal learning some progress can be noted but still a lot of work remains to be done, with regard to policies, procedures, implementation and monitoring. Currently, there is hardly any data on how many students / candidates are actually participating in the recognition of non-formal and informal learning and are exempted from some or all higher education programme requirements. The same goes for access via alternative routes more generally.

Academic and/or career guidance services are commonly provided by higher education institutions in all 48 higher education systems for which data is available. In two-thirds of the systems, higher education institutions provide psychological guidance services as well. Special services for students with disabilities also exist in a number of cases. In all systems for which information is available, support services are not only offered to enrolled students but also to prospective students. While this wide-spread existence of student services is certainly a positive development, the available data does not allow the quality and effectiveness of the services provided to be assessed, nor the extent to which services are accessible to all students.

Fees and financial support systems have been relatively stable within the EHEA, with no major changes in the general direction of approaches, the share of household contributions or public expenditure on student support. Fees (tuition and administrative fees combined) are widespread, with only seven education systems not levying any student contributions. Yet, there is a large variation between higher education systems regarding the proportion of students paying fees (from nearly no one to everyone) as well as the amount of fees they need to pay (from nearly zero to more than 100 % of the GDP per capita). Countries also rely on different combinations of forms of student support, and the proportion of students receiving such support also varies widely. In general, first cycle students tend to receive more public support than students studying in the second cycle. In the third cycle, as a result of different statuses of doctoral candidates in EHEA countries, fees and support systems are even more diverse.

CHAPTER 5: LIFELONG LEARNING

The Bucharest Communiqué

It is stated in the Bucharest Communiqué that "**lifelong learning** is one of the important factors in meeting the needs of a changing labour market, and higher education institutions play a central role in transferring knowledge and strengthening regional development, including by the continuous development of competences and reinforcement of knowledge alliances." The ministers also asked for more targeted data collection and referencing against common indicators, including **lifelong learning**, and wanted to enhance **lifelong learning** provision in the educational programmes.

Higher education institutions play a central role in providing lifelong learning. This topic has been on the Bologna Process agenda from the very beginning, although often addressed as a secondary consideration in relation to other objectives. Nevertheless, higher education ministers have emphasised that it is necessary to develop flexible learning pathways; to create opportunities for the recognition of prior learning; to establish national qualifications frameworks; and to build closer cooperation between higher education institutions and various external partners, including employers.

The European Universities' Charter on Lifelong Learning recognises that "the terminology of lifelong learning embraces many concepts [...] and is subject to considerable local, regional and national interpretation" (EUA, 2008). Therefore, it is necessary to examine how different EHEA countries understand and interpret the concept of lifelong learning within their respective higher education systems.

The 2012 Bologna Implementation Report

The 2012 report showed that different understandings of lifelong learning across countries in higher education are difficult to capture. Where definitions of lifelong learning exist, they are often very broad, not allowing understanding fully how lifelong learning in higher education is viewed and which activities fall under the concept. Nevertheless, according to the 2012 report, in most EHEA countries lifelong learning had become a recognised mission of all higher education institutions.

Concerning distinct elements of lifelong learning in higher education, the 2012 report showed that most EHEA countries recognise through various policy actions that higher education programmes need to be delivered flexibly. Around two-thirds of countries had established an official student status other than the status of a full-time student.

Data on the participation of students in part-time studies indicated that mature students are those who are the most likely to study part-time. The analysis also showed that cross-country comparisons related to alternative modes of study should be carried out with caution, taking into account conceptual complexity in this field.

Chapter outline

This chapter looks at key aspects of lifelong learning in the higher education sector and examines whether changes have occurred since the last reporting exercise in 2012. It first looks at how different countries understand and interpret the concept of lifelong learning in higher education. It then examines how lifelong learning is becoming a recognised mission of higher education institutions, and financial arrangements promoting lifelong learning provision. A substantial part of the chapter examines how higher education institutions deliver higher education programmes flexibly, focusing specifically on part-time higher education studies. The two final sections look at how successful different higher

education systems have been in attracting non-traditional learners to participate in formal higher education programmes, focusing on participation of mature students and delayed transition students.

Other chapters of the report also provide information closely related to the theme of lifelong learning in higher education, so this chapter should be read with information provided in other parts of the report in mind, in particular Chapter 4 on the social dimension in higher education and Chapter 6 on higher education outcomes and employability. Related to the themes of this chapter, Chapter 4 deals with the issue of flexibility through examination of recognition of prior learning (RPL) which is often an element in lifelong learning to facilitate adult participation, for example. Chapter 6 examines issues related to career guidance and involvement of employers in designing study programmes, which also can involve elements designed for lifelong learning, for example.

5.1. National understanding of the concept of lifelong learning

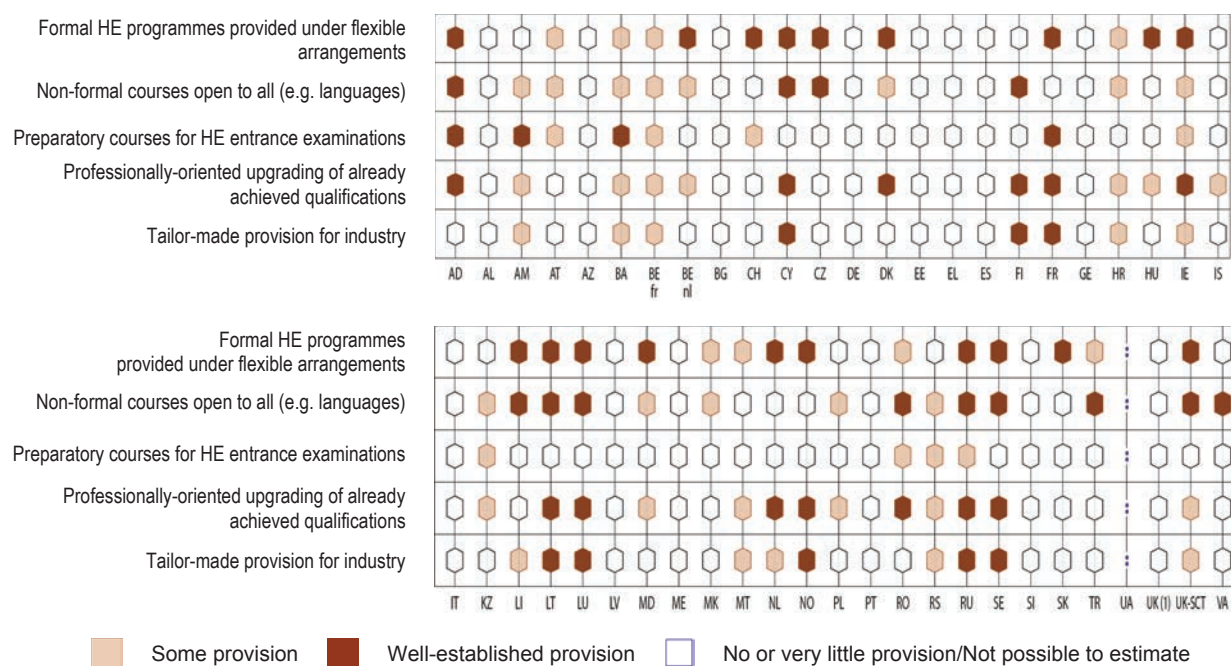
The results of the Bologna follow-up group (BFUG) reporting exercise in 2012 showed that in the majority of EHEA countries steering documents related to higher education refer to lifelong learning, but they do not necessarily provide a clear definition of this term. Also In the new reporting exercise it was found that most definitions of lifelong learning are broad. In many cases they refer to learning 'from cradle to grave' or to all learning activities undertaken by individuals throughout their lives, be they formal, non-formal or informal. Examples of these general definitions can be found for instance in Bosnia-Herzegovina, where ““Lifelong Learning means integration of formal, non-formal and informal learning in order to acquire abilities for continuous improvement of quality of life” and in Kazakhstan where “Lifelong learning starts from early childhood and lasts until post-pensionable age, including variety of formal and informal forms of education, inclusive education.” In Romania, “Lifelong learning represents all learning activities undertaken during the life of every person in formal, non-formal and informal training or skills development for a multiple perspective: personal, civic, social or occupational. Lifelong learning includes early education, school education, higher education, continuing education and training of adults.”

There were examples of more specific definitions, in addition to the general definitions, for example, focusing on upgrading vocational skills (Estonia, Serbia) and meeting the needs of labour market and economy (Bulgaria and Serbia). In Estonia, the definition states that “new knowledge and skills acquisition will provide opportunities for jobs, free education and interest in and for young people, as well as participation in the activities of civil society organisations or virtual space where you can learn individually or in tandem with others. “ In Bulgaria, “National strategy for lifelong learning sets the strategic framework of the government policy on education and training in the period 2014 – 2020 and aims to achieve the European goal of smart, sustainable and inclusive growth.”

In the Netherlands, lifelong learning emphasises the needs of adults who have entered labour-market after initial education, while in the Czech Republic apart from professionally oriented courses lifelong learning includes also courses aimed at older citizens.

To respond to non-traditional learners' needs, higher education institutions may perceive that they need to develop programmes for this purpose. The types of programmes reported addressing the needs of this target group are most often formal higher education programmes. They are very well established (in about one third of the countries (see Figure 5.1). Non-formal programmes, including activities such as language learning and courses for updating professional skills were almost as common. Preparatory courses for entry into higher education were not very common, with only a few countries reporting well established provision (in over 75% of institutions) in this area. The group “little or no provision” includes also countries who responded that the share of lifelong learning provision is impossible to estimate.

Figure 5.1: Types of Lifelong Learning provision in Higher Education Institutions by country, 2013/14



Source: BFUG questionnaire.

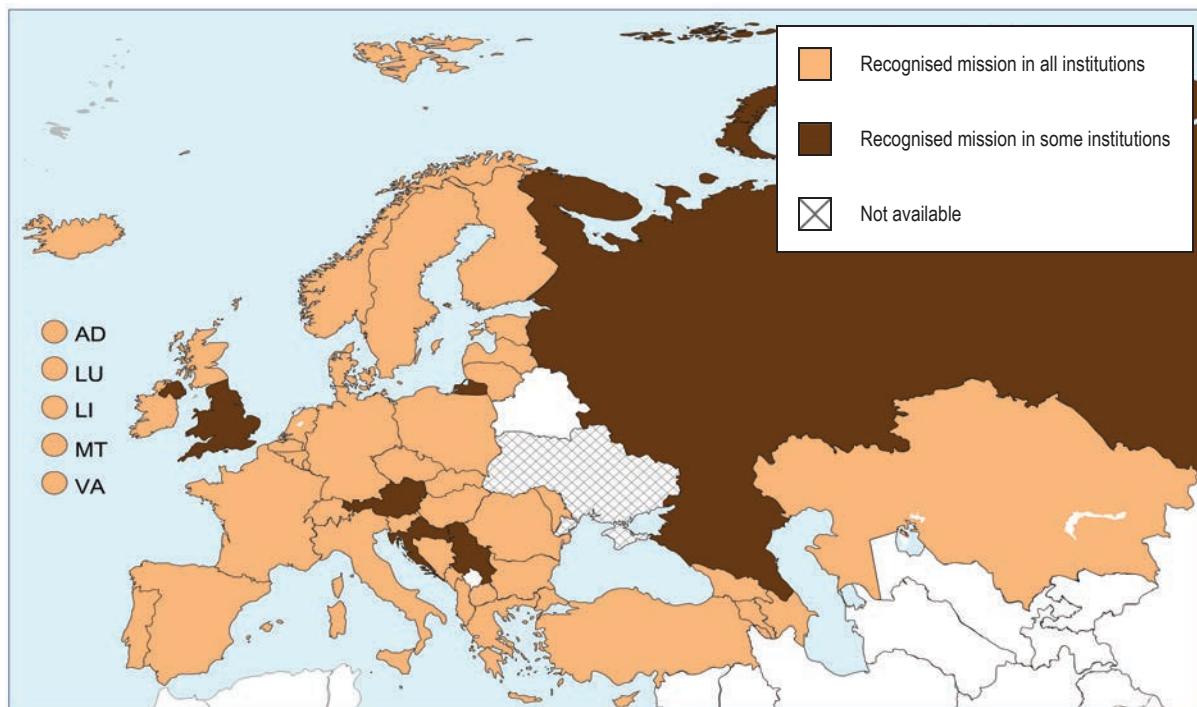
UK ⁽¹⁾ = UK-ENG/WLS/NIR

In the previous reporting exercise it was found that non-formal courses are the most common type of lifelong provision. The results from the current reporting exercise suggest that formalised programmes of lifelong learning are becoming more and more common, reflecting the importance given to lifelong learning. However, as many countries were not able to provide details of different types of lifelong learning provision, the findings must be treated with caution.

5.2. Lifelong learning as a recognised mission of higher education institutions

Despite differences in understandings of the concept in different countries, more than three-quarters of EHEA countries report that lifelong learning is a recognised mission in all higher education institutions, reflecting the centrality of this policy. The concept of lifelong learning appears to be gaining ground, as a number of countries claim that lifelong learning has become a recognised mission in all institutions since the last reporting exercise (Armenia, Cyprus, Georgia, Moldova and Poland), as opposed to only in some institutions. Only Austria, Croatia, Serbia and the United Kingdom (England, Wales and Northern Ireland) and Russia now state that it is a mission for only some institutions (see Figure 5.2).

Figure 5.2: Lifelong learning as a recognised mission of higher education institutions, 2013/14



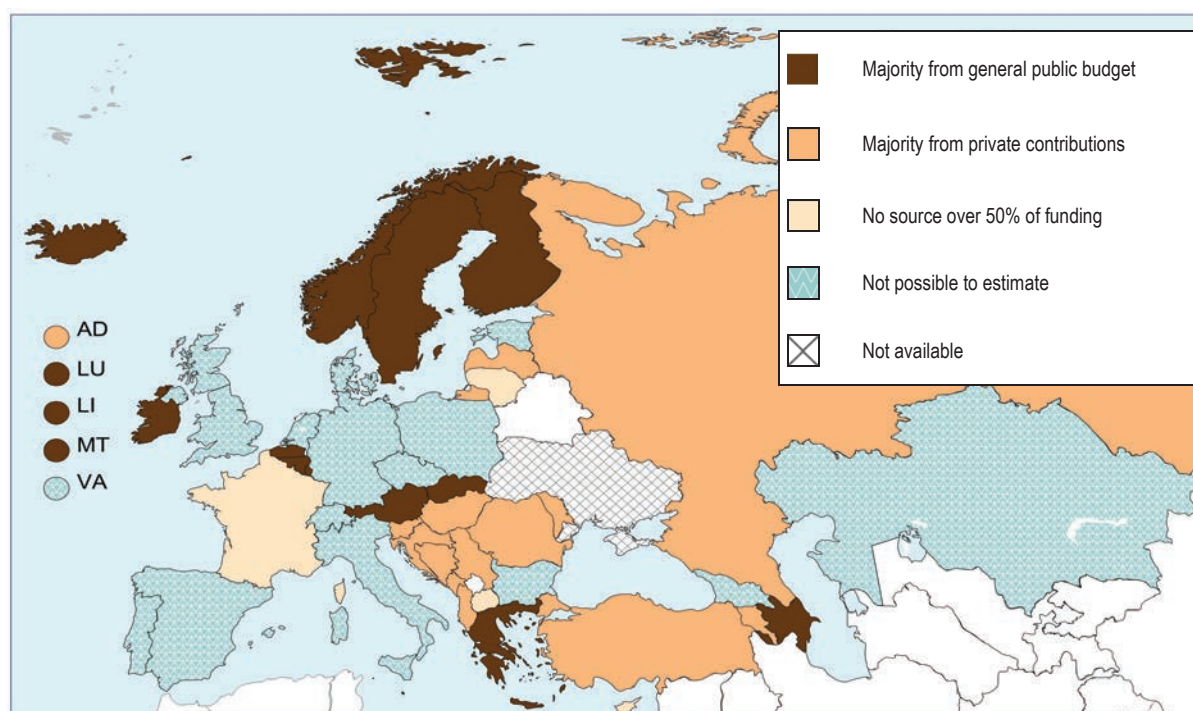
Source: BFUG questionnaire.

The majority of EHEA countries do not identify any legal restrictions preventing higher education institutions from offering lifelong learning provision or services. Ten countries refer to legal constraints related to different segments of lifelong learning in higher education. For example, in Belgium (French Community), it is possible to obtain a certificate or credits as part of continuous training programmes, but not have an academic degree within those programmes. In Denmark, university colleges and academies for professional higher education are only allowed to offer adult education and training covering short cycle and first cycle, but not second cycle. In Germany, the 16 *Länder* provide continuing education alongside research and teaching within the Framework Act for Higher Education (*Hochschulrahmengesetz HRG*). In Romania, according to the law, higher education institutions can organize lifelong learning programmes in the scientific fields in which they already have accredited programmes at least at the bachelor level, and lifelong learning programmes can only function in the languages, degree levels and scientific fields in which higher education institutions have accredited study programmes at the bachelor level. However, legal restrictions are often very specific, and they do not necessarily reveal the importance countries place on lifelong learning.

5.3. Financing lifelong learning

Information on financial arrangements in education is commonly regarded as an important topic, as it plays a central part in policy making. Examining the sources for funding of lifelong learning, especially differences between public and private funding, should give us clues about the emphasis public authorities give to lifelong learning. However, countries have different understandings of lifelong learning, making comparative analysis difficult as there are few shared conceptions of lifelong learning. The concepts can refer to narrower or wider range of lifelong learning provision in higher education. Based on their own understanding of the issue, many countries were able to provide data on the funding sources for lifelong learning, showing a more detailed picture of the situation than in the 2012 report (see Figure 5.3).

Figure 5.3: Sources of financing for Lifelong Learning, 2013/14



Source: BFUG questionnaire

In 40 higher education systems for which data was available, higher education institutions do not have a public budget specifically for lifelong learning. Only eight countries have a specific budget for lifelong learning provision, and even in those countries provides only for a limited share of funding for lifelong learning. Therefore, public resources for lifelong learning come mostly from general public budgets, often combined with other financial resources, such as private contributions from students or businesses. As Figure 5.3 shows, in 14 countries, the general education budget contributes the majority of funds to lifelong learning. Private contributions from students form over half of lifelong learning funding in 14 countries.

Private contributions from businesses do not comprise the majority of funding in any system, but they form at least 20% of lifelong learning funding in ten systems (Albania, Andorra, Bosnia-Herzegovina, Denmark, France, the former Yugoslav Republic of Macedonia, Italy, Lithuania, Russia and Serbia, being the highest in France (44%). Countries with at least 90% of funding coming from the two sources (students' contributions and contributions from businesses) were mostly in the South-eastern Europe, i.e. Albania, Armenia, Croatia, Moldova, Montenegro, Russia, Slovenia and Turkey, and also in Andorra.

The above information shows that public funding for lifelong learning is dominant in Central and Northern Europe, while private funding is more common in South-East Europe. It is not possible to estimate what share of the public education budget is used for lifelong learning in each country, however.

5.4. Promoting flexible delivery of higher education programmes

Flexibility in higher education refers to different ways of enabling individuals to follow educational paths adapted to their needs. This section focuses on one aspect of flexibility in higher education, namely flexible modes of delivery of higher education programmes. The issue of part-time student status, a central instrument in flexible provision, and its implications are dealt with in the sections that follow. Recognition of prior learning in both access and progression in higher education, which are central to flexibility of study paths, are dealt with in chapter 4.

5.4.1. Policy approaches targeting flexible delivery of higher education programmes

In most countries the promotion of delivering higher education programmes flexibly was stated explicitly in policy documents. For example, in Ireland, the National Strategy for Higher Education (2011) recognises that the future delivery of higher education in Ireland must be flexible, and the higher education institutions must accommodate and serve the needs of an increasingly diverse student body. In Austria, National Strategy for Lifelong Learning 2020 states that the higher education institutions' self-understanding includes the use of group-appropriate teaching and learning methods and making programmes more flexible to allow working students to participate in other ways than daytime classes, for example. In the Czech Republic, the Higher Education Act 111/98 stipulates that on-site studies and distance studies (or a combination of them) have equal validity, and all students are entitled to equal rights and benefits.

Distance learning, or e-learning is one way of providing flexibility for students to undertake their studies. As they do not have to be present at the institution, it offers them opportunities to combine studies with other commitments, which are typical especially for mature students. These types of courses were offered in around one third of countries. Distance learning can also be combined with on-site studies, as was the case for example in Belgium (French Community) and the Czech Republic.

In Italy and Georgia, there have been measures enabling students to stop their studies for a certain period, without losing their student status, making the continuation of studies after breaks easier. In Sweden, employees are allowed a leave of absence to study and guaranteed the same or an equivalent employment when they return. These measures can provide more flexibility for students wishing to study while working, or even taking a break to gain work experience.

Other examples of promoting flexible delivery of higher education programmes include the increase in tailor-made and individual learning paths. In France, these are now high on the agenda and universities have been provided autonomy on how to organise them. For example, universities provide some students with the opportunity to follow a learning path based on two different subject areas, or to study for innovative degrees.

5.4.2. Studying in higher education with a formal status other than the status of a full-time student

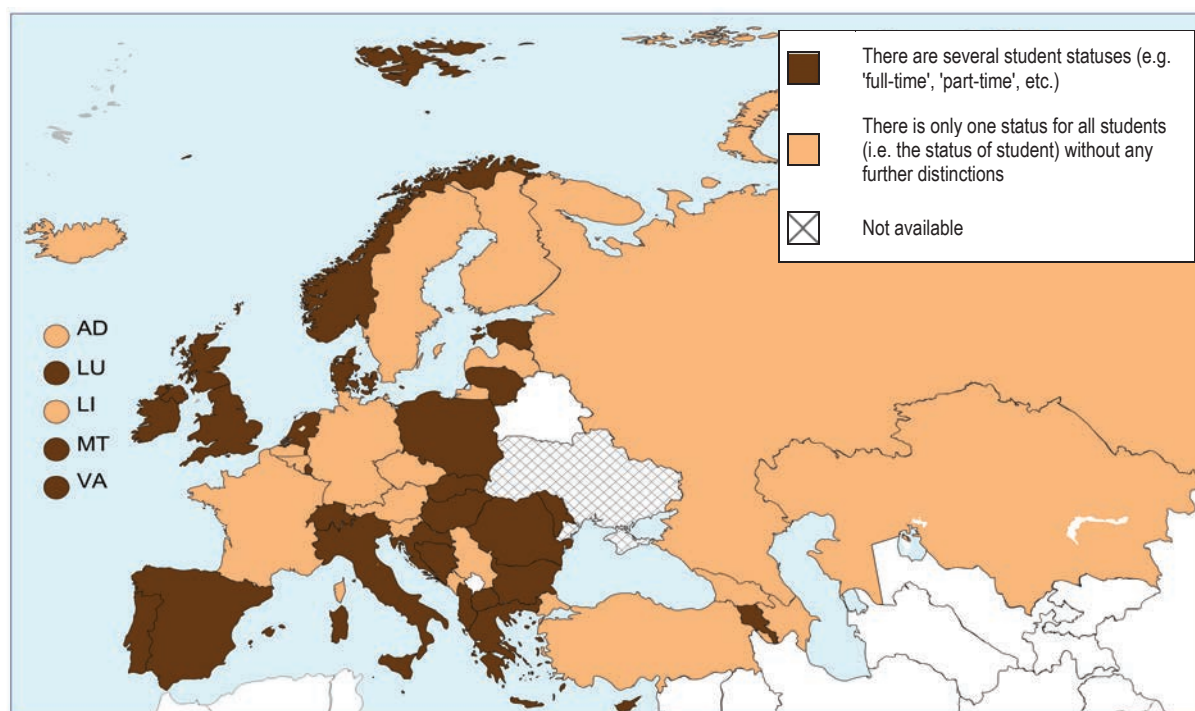
The concept of a full-time student status is clear and understandable across the European Higher Education Area. However, the reality of other kinds of students is more complicated than it may initially appear. This is because terms such as "part-time" for example, mean very different things in different countries – sometimes referring strictly to a notion of time related to teaching/learning hours, and sometimes related to funding arrangements.

The situation regarding student status remains very similar across Europe compared to the previous reporting exercise. The majority of countries formally still recognise at least one additional student status alongside the status of a full-time student. Figure 5.4 provides a picture of the situation across the EHEA. It shows that in around two-thirds of higher education systems for which data is available, there is an official student status other than the status of a full-time student, usually indicating some concept of "part-time" student.

Part-time studies are most commonly defined according to the number of credits, the time allowed for completing studies, or hours devoted to studying. In some countries the definition included a combination of these factors. For example, in Albania, Bosnia-Herzegovina, Ireland and the United Kingdom (Scotland), part-time student is defined mainly in terms of fewer credits they need to achieve within the same timeframe as full-time students. On the other hand, for example in Albania, Estonia, Cyprus, Malta, Poland and the United Kingdom (England, Wales and Northern Ireland)), part-time studies mean needing to achieve the same number of credits as a full-time student, but within a longer timeframe. Both definitions are thus very similar, emphasising what number of credits a part-time student needs to achieve within a given timeframe.

In Greece and Slovakia, part-time studies are defined as expected hours of study per week. In Greece, the law expects part-time students to study at least 20 hours per week. In Slovakia, the required hours are defined as study hours per academic year, 750 to 1440 hours for part-time student, as opposed to 1500 to 1800 for full-time student. In Hungary and Moldova, part-time students are defined in terms of contact hours, as between 30 to 50% of those of full-time students, and as about 40% of those of full-time students (Moldova).

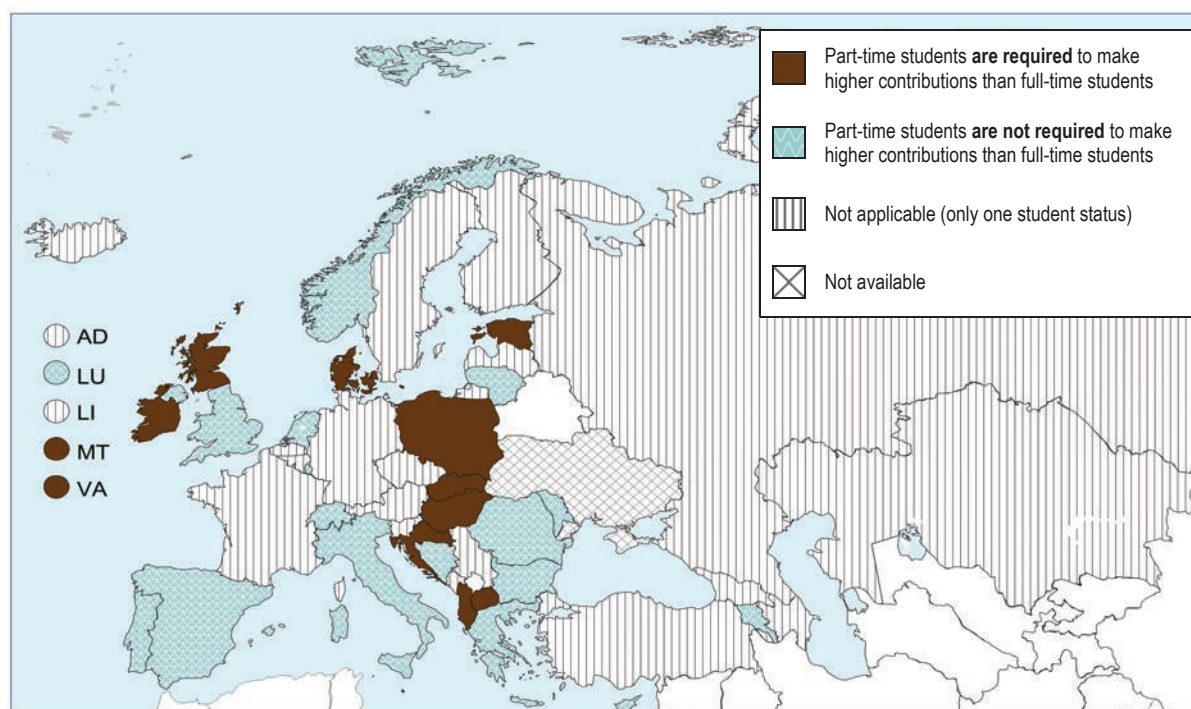
Figure 5.4: Existence of a formal student status other than the status of a full-time student, 2013/14



Source: BFUG questionnaire

In eight systems (Albania, Croatia, Denmark, the former Yugoslav Republic of Macedonia, Holy See, Hungary, Ireland, and Malta), part-time studies are likely to be related to higher private financial investment than full-time studies (Figure 5.5). For example, in Denmark there are no fees for full-time students, but part-time students are required to contribute financially to their studies, while in Hungary the fees are almost the same as for a full-time programme. In the majority of countries, part-time students are not required to pay higher financial contributions.

Figure 5.5: Impact of formal student status on financial arrangements related to higher education studies, 2013/14



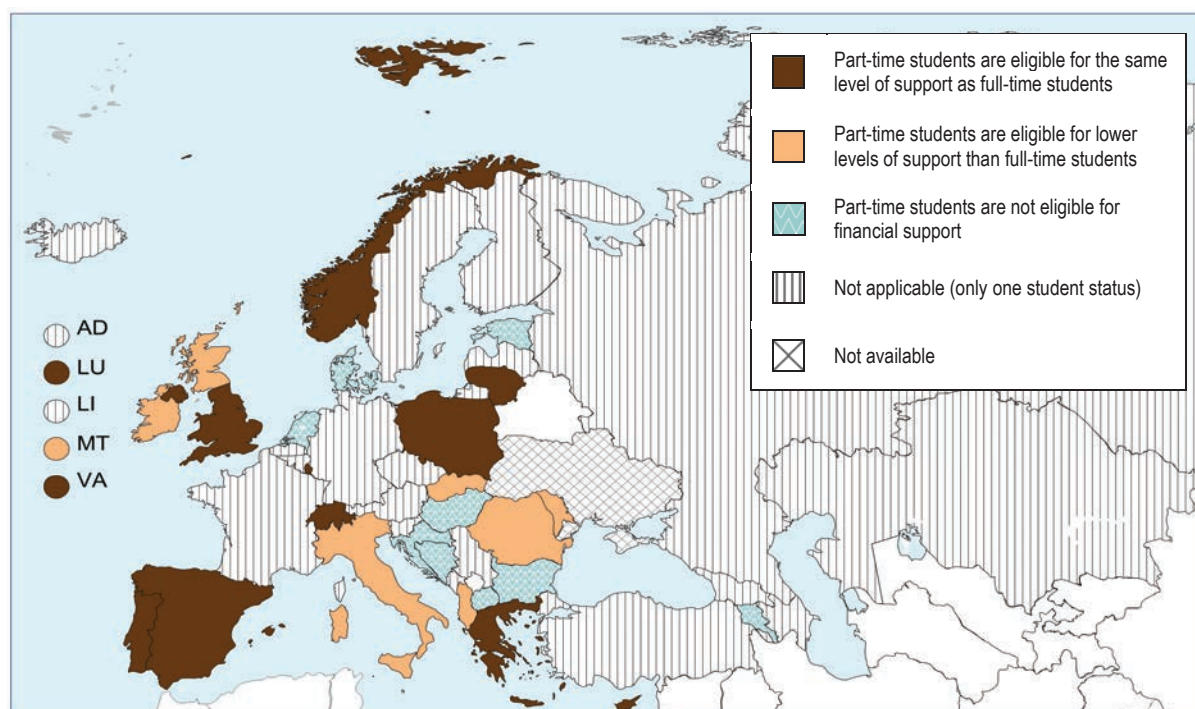
Source: BFUG questionnaire.

The picture regarding the amount of support part-time students receive for the same amount of credits compared to full-time students is also varied (Figure 5.6). In 11 countries, part-time students are eligible for the same amount of support as full-time students. In eight countries they receive lower support, while in 10 countries they are not eligible for financial support.

If part-time students are entitled to the same support as full-time students, there is often a minimum requirement for qualifying for support. For example, in Portugal, to be eligible for a grant, part-time students should be enrolled at least in 30 ECTS. In Norway, financial support to part-time students is awarded if the volume of study is at least 50 per cent of a full time study. The amount awarded in this case is either 50 per cent or 75 per cent of the maximum amount, depending on the volume of study.

In countries where part-time students receive lower financial support than full-time students, sometimes they are entitled to a student loan (for example Slovakia) or they can receive other state benefits than student grants within adult education (for example Denmark).

Figure 5.6: Impact of student status on eligibility of financial support for students, 2013/2014



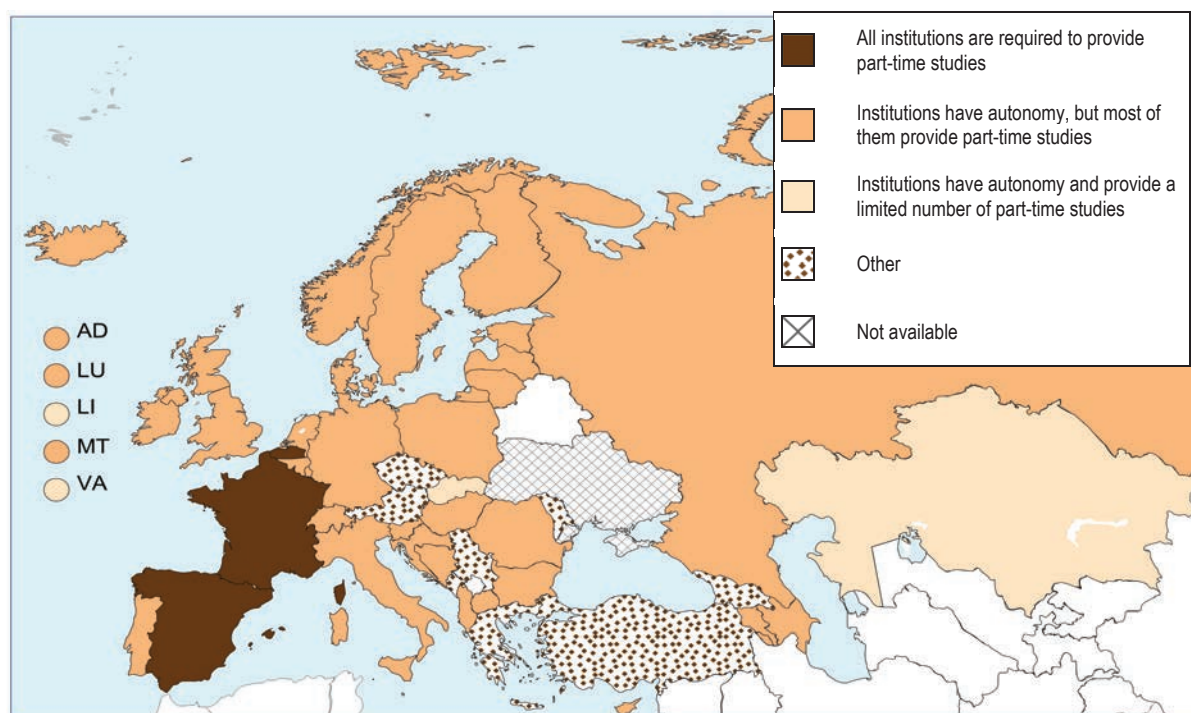
Source: BFUG questionnaire.

The two financial aspects examined in this section are closely related and they both can have an impact on students with other than full-time status. For example, part-time students may not have to pay higher fees than full-time students, but they may receive also lower support than full-time students, or no support at all. Some clusters of countries with different relationship between students' financial contributions and the support they receive can be identified. On one hand, in Cyprus, Greece, Lithuania, Luxembourg, Norway, Portugal, Spain and the United Kingdom (England, Wales and Northern Ireland), part-time students do not have to pay higher fees, and they are also eligible for the same level of support as full-time students. On the other hand, in Croatia, Denmark, former Yugoslav Republic of Macedonia and Hungary, students have to pay higher contributions than full-time students, and they do not receive any support. This kind of comparison has to be treated with caution, as there is no information about how much higher or lower the support students receive is compared to the financial contributions they have to make. Nevertheless, it is reasonable to conclude that systems where part-time students do not have to make higher contributions while receiving the same support as full-time students promotes studying through flexible arrangements.

5.4.3. Provision of part-time studies by higher education institutions

Higher education institutions in the majority of EHEA countries can decide if they wish to offer other types than full-time studies (see Figure 5.7). The situation has not changed much since the last reporting exercise, but some countries report changes. For example, Germany, Iceland and the United Kingdom (England, Wales and Northern Ireland) report that most of their higher education institutions now provide part-time studies without an obligation to do so. Conversely, in Bosnia-Herzegovina, Kazakhstan and Lithuania, now only a limited number of institutions provide part-time studies. Providing part-time studies is no longer a requirement in Slovakia, and now only a limited number of institutions provide part-time studies. In Estonia, as a result of institutional autonomy, most institutions still provide part-time studies even though they are not required to do so.

Figure 5.7: Provision of part-time studies by higher education institutions, 2013/14



Source: BFUG questionnaire.

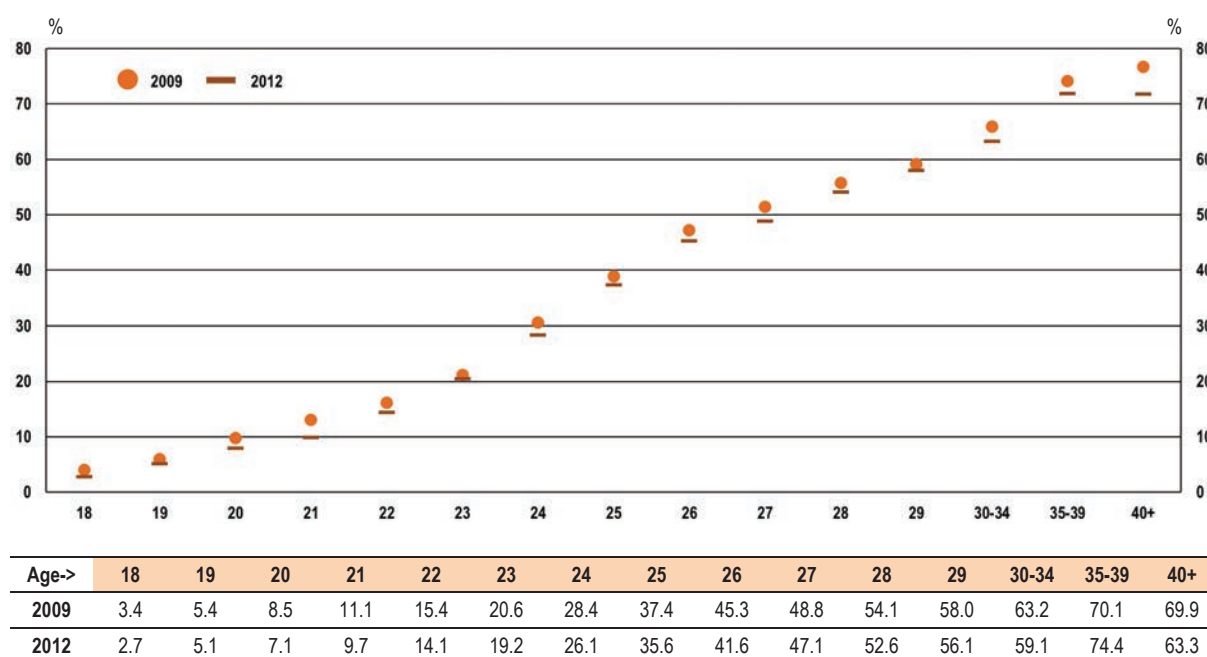
All in all, while there have been developments in the volume of provision of part-time studies in various countries, the changes have mostly taken place without any regulation imposed from the authorities. As the Estonian example shows, there is still widespread provision of part-time studies after universities have been given autonomy to decide whether to provide them, and in other countries mentioned above, part-time studies have spread to almost all higher education institutions in the respective countries since the last reporting exercise.

5.4.4. Statistical data on student participation in part-time studies

After looking at different policy approaches to lifelong learning across the EHEA, the present section aims to assess how successfully the higher education systems respond to the needs of lifelong learners. There is no perfect measure covering this area fully. Available data on the participation of mature students (Eurostat) and delayed transition of students (Eurostudent) can be used as a proxy to evaluate the degree to which different higher education systems have already established a culture of lifelong learning.

Figure 5.8 presents the median of country percentage for students studying part-time in tertiary education by age, providing a snapshot of the proportion of the student population by age studying part-time. This indicator is limited because countries may have different definition of part-time studies compared to the UOE definition.

Figure 5.8: Median of country percentages for students studying part-time in tertiary education, by age, 2011/12



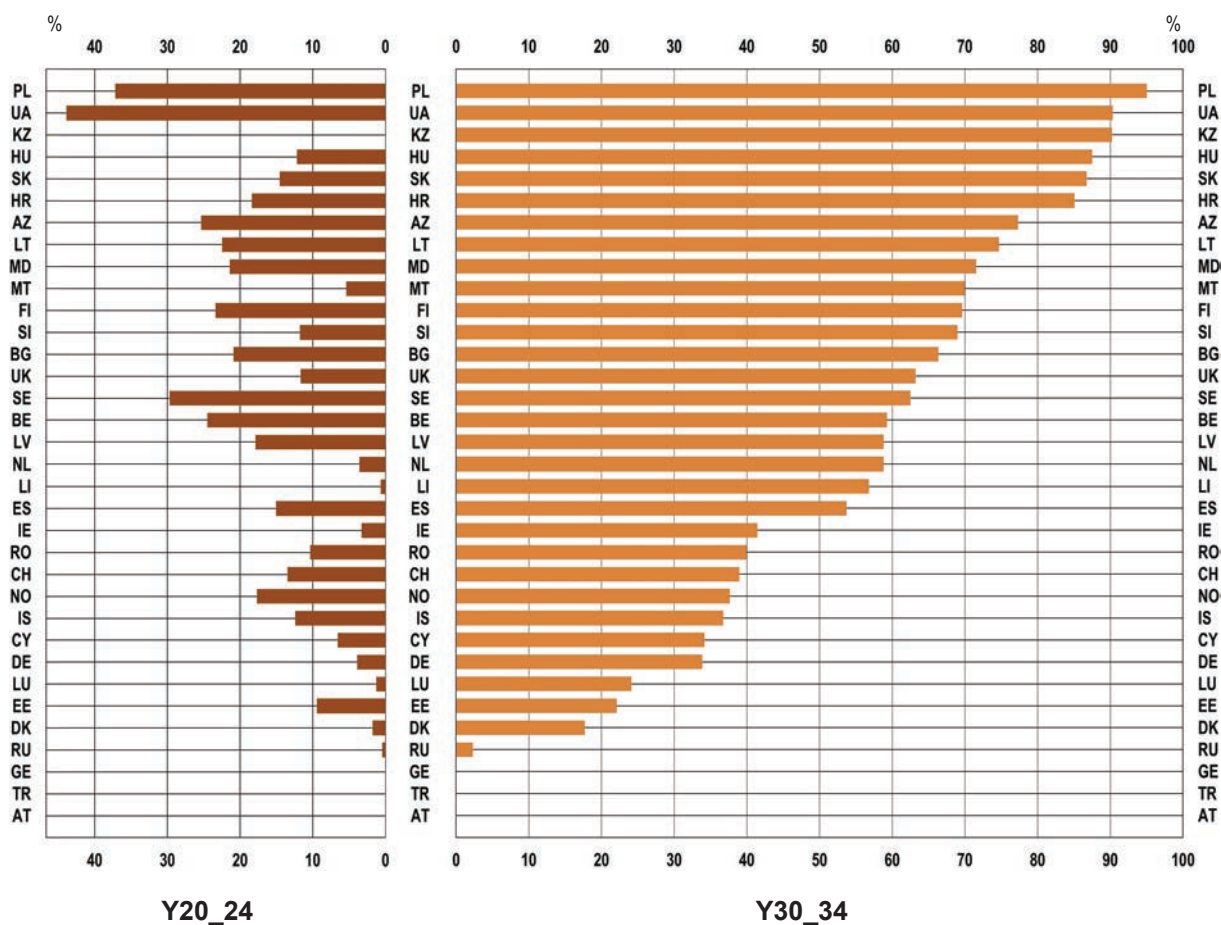
Notes: Moldova: data only cover ISCED level 5. [To be included].

Source: Eurostat, UOE and additional collection for the other EHEA countries.

The data clearly indicate that the age of students influences part-time studying, as was the case in the previous reporting exercise. Older students are much more likely to study part-time than their younger peers. In the EHEA countries, less than 20 % of students between ages of 18 and 23 study part-time. For students in their late twenties, the majority of students are part-timers in half of the EHEA countries. Part-time studies are the most common way of studying for over 30-year-old adults: part-time students account for almost 60 % or more of all students of these ages enrolled in tertiary education.

Figure 5.9 shows the situation of individual EHEA- countries for which data is available, showing the percentage of part-time students among students of age groups 20 to 24 and 30 to 34.

Figure 5.9: Percentage of students studying part-time in tertiary education, by country and by age, 2011/12



Notes:

Moldova: data only cover ISCED level 5. [To be included]. Greece and Italy: not applicable; Czech Republic, France and Portugal: not available.

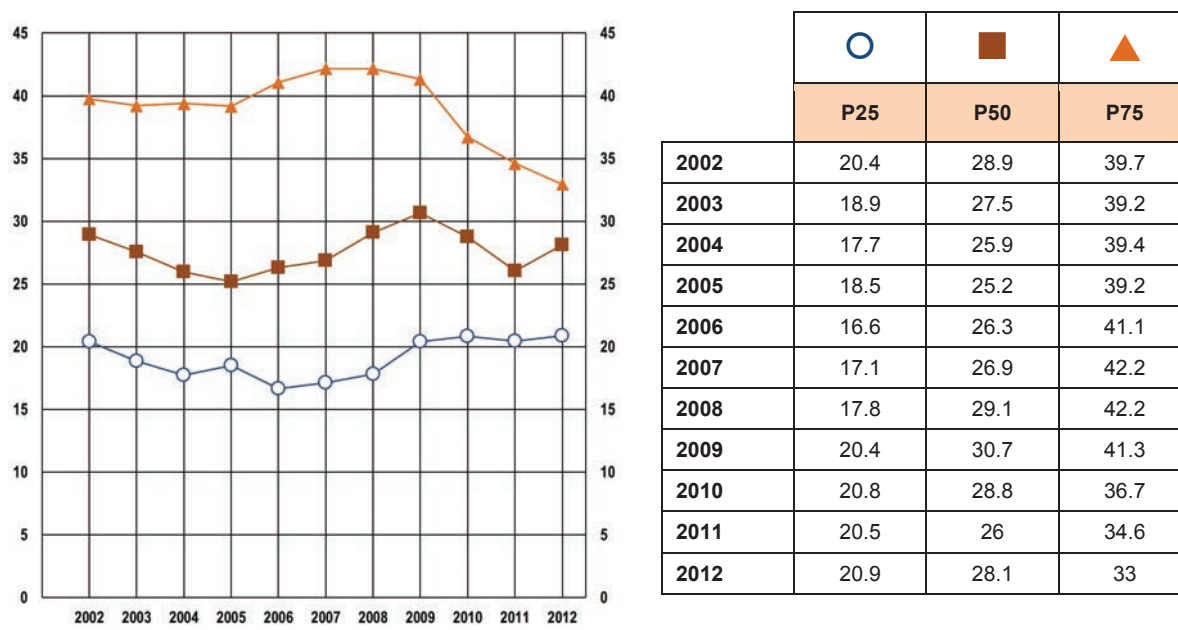
Source: Eurostat, UOE and additional collection for the other EHEA countries.

The older the students are, the more likely they are to study part-time in all countries. The share of part-time students of the total student population among the 30 to 34-year-olds vary from 18 % (Denmark) to 95 % (Poland). Part-time students form a substantial proportion of older students in half of the EHEA countries. In some countries (Poland, Ukraine, Kazakhstan, Hungary; Slovakia and Croatia) more than 80 % of higher education students are aged between 30 and 34. A significant number of students in the younger age group studies part-time in some EHEA countries. Indeed, in several EHEA countries, more than one fifth of students in the younger age group are part-timers, for example in Ukraine (43.9 %), Poland (37.2 %), Sweden (29.7 %) and Azerbaijan (25.3 %), but also in Belgium, Finland, Lithuania, Moldova and Bulgaria.

The share of part-timers in the older age group students is more than twice as high as in the younger age group in all EHEA countries for which data is available. In Luxembourg, the Netherlands, Malta, Ireland and Denmark the share of part-timers in the older age group is ten times higher than among their younger peers.

Figure 5.10 shows trend data covering all age categories. More than 28.1 % of all students are part-time students (academic year 2011/12) in half of the EHEA countries for which data is available. Between 2008/09 and 2010/11, the number of part-time students declined, but rose again for the academic year 2011/12. Such decline is also observed when considering the top fourth of the distribution of the EHEA countries for which data is available. In 2008/09, part-time students accounted for more than 41 % in one fourth of the EHEA countries and then share fell to 33 % in 2011/12.

Figure 5.10: Median, percentile 25 and percentile 75 of the percentage of students studying part-time in tertiary education, by year, 2002-2012



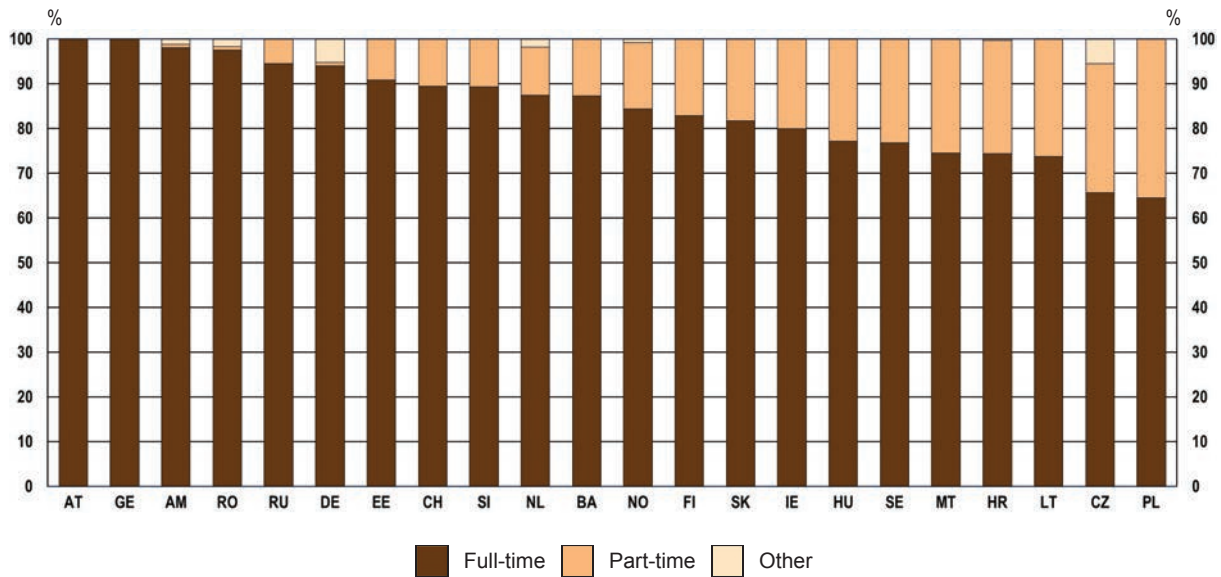
Notes:

Percentiles and Median have been computed on available data for each year. Thus the geographical coverage varies according to the reference years.

Source: Eurostat, Labour Force Survey (EU-LFS) and additional collection for the other EHEA countries.

Another way of looking at the issue of full- and part-time studies is through Eurostudent research, which also enables the evaluation of the relationship between the formal student status and the number of hours students spend during a typical week on study-related activities, i.e. taught courses and personal study (Figure 5.11).

Figure 5.11: Students by formal status of enrolment (self-reported) in %, 2013/14



	AT	GE	AM	RO	RU	DE	EE	CH	SI	NL	BA
Full-time	100.0	100.0	98.0	97.5	94.5	94.0	90.9	89.5	89.3	87.4	87.3
Part-time	0.0	0.0	0.8	0.8	5.5	0.8	9.1	10.5	10.7	10.8	12.7
Other	0.0	0.0	1.2	1.7	0.0	5.1	0.0	0.0	0.0	1.7	0.0
	NO	FI	SK	IE	HU	SE	MT	HR	LT	CZ	PL
Full-time	84.4	82.9	81.7	80.0	77.2	76.8	74.5	74.4	73.7	65.7	64.5
Part-time	14.8	17.1	18.3	20.0	22.8	23.2	25.5	25.3	26.3	28.8	35.5
Other	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	5.5	0.0

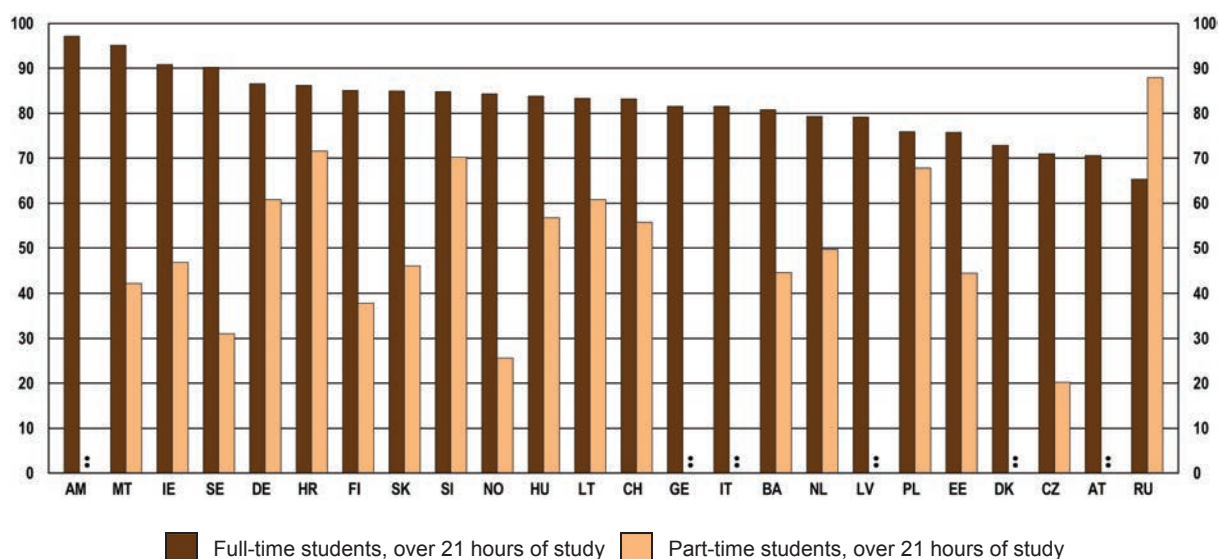
Source: Eurostudent.

According to Eurostudent-data, over 80% of students report themselves to be full-time students in 14 countries. In eight countries (Ireland, Hungary, Malta, Sweden, Lithuania, Croatia and the Czech Republic), at least 20% of students report to be part-time students.

Figure 5.12 looks at a typical study week of both full-time and part-time students, showing full-time and part-time students who spend over 21 hours per week on studies. In addition to official part-time students, full-time students who report studying up to than 20 hours per week can be considered as *de facto* part-time students. Not surprisingly, in all countries (except Russia), over 70% of full-time students report that they devote over 21 hours per week for studying. By contrast, in eight countries (Russia, Poland, Switzerland, Lithuania, Hungary, Slovenia, Croatia and Germany), over half of students who consider themselves part-time students report high study intensity of over 21 hours per week.

As previous data show, students may be considered as full-time students, even if they devote fewer hours to study than is often considered being full-time studying. Conversely, in some countries, part-time students may devote more hours to study than is usually required. Thus, the link between official student status and hours devoted to studying is not always straightforward, i.e. full-time students do not always devote more hours to studying than part-time students,.

Figure 5.12: Share of full-time and part-time students by hours spent on study-related activities in a typical week in %, 2013/14



	AM	MT	IE	SE	DE	HR	FI	SK	SI	NO	HU	LT	CH	GE	IT	BA	NL	LV	PL	EE	DK	CZ	AT	RU
FT, +21 hrs	97.2	95.2	90.9	90.2	86.6	86.2	85.1	85.0	84.8	84.3	83.8	83.3	83.2	81.6	81.5	80.8	79.3	79.1	75.9	75.7	72.8	71.0	70.6	65.3
PT, +21 hrs	:	42.2	46.8	31.1	60.8	71.6	37.8	46.2	25.6	56.8	60.8	55.7	:	:	44.6	49.7	:	67.8	44.5	:	20.2	:	88.0	:

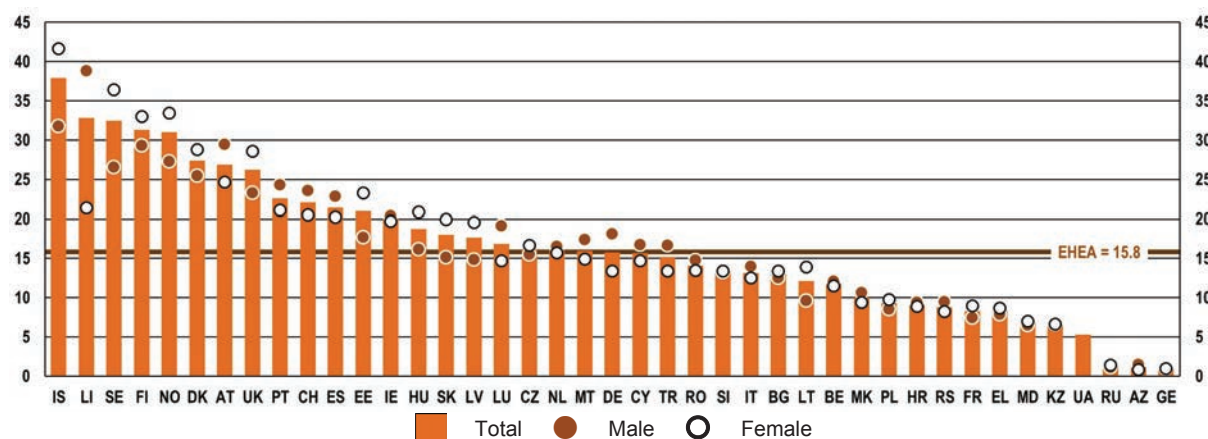
Source: Eurostudent

5.5. Participation of mature students and delayed transition students in formal higher education provision

After examining primarily different policy approaches related to lifelong learning across the EHEA, the present section examines how successful higher education systems are in attracting "lifelong learners". There is no perfect measure that would fully cover this area, but available data on the participation of mature students (Eurostat) and delayed transition students (Eurostudent) can be used as a proxy to evaluate the degree to which different higher education systems have already established a culture of lifelong learning.

Figure 5.13 focuses on the age composition of the student population in 2011/12 and allows identifying the countries where the population of "mature students" (i.e. 30 years or older) accounts for a large share of the total student population.

Figure 5.13: Percentage of students enrolled in tertiary education, total and by gender, 30 or more years old, 2011/12



	IS	LI	SE	FI	NO	DK	AT	UK	PT	CH	ES	EE	IE	HU	SK	LV	LU	CZ	NL	MT	DE
Total	37.9	32.8	32.4	31.3	31.0	27.4	26.9	26.2	22.6	22.0	21.4	21.0	20.0	18.8	18.0	17.7	16.8	16.2	16.1	16.0	15.8
Male	31.8	38.9	26.6	29.3	27.3	25.5	29.4	23.3	24.3	23.6	22.8	17.7	20.4	16.1	15.1	14.8	19.1	15.5	16.5	17.4	18.1
Female	41.6	21.4	36.4	33.0	33.5	28.8	24.7	28.6	21.1	20.5	20.2	23.3	19.7	20.9	19.9	19.6	14.7	16.6	15.7	14.9	13.4
	CY	TR	RO	SI	IT	BG	LT	BE	MK	PL	HR	RS	FR	EL	MD	KZ	UA	RU	AZ	GE	
Total	15.7	15.2	14.1	13.3	13.2	13.0	12.1	11.8	10.0	9.3	9.1	8.8	8.3	8.2	6.8	6.6	5.3	1.2	1.1	1.0	
Male	16.7	16.7	14.7	13.3	14.0	12.5	9.6	12.1	10.7	8.6	9.4	9.5	7.5	7.8	6.5	6.6	:	1.1	1.5	0.9	
Female	14.7	13.4	13.5	13.4	12.5	13.4	13.9	11.5	9.4	9.8	8.9	8.2	9.0	8.7	7.0	6.6	:	1.4	0.8	1.0	

Notes:

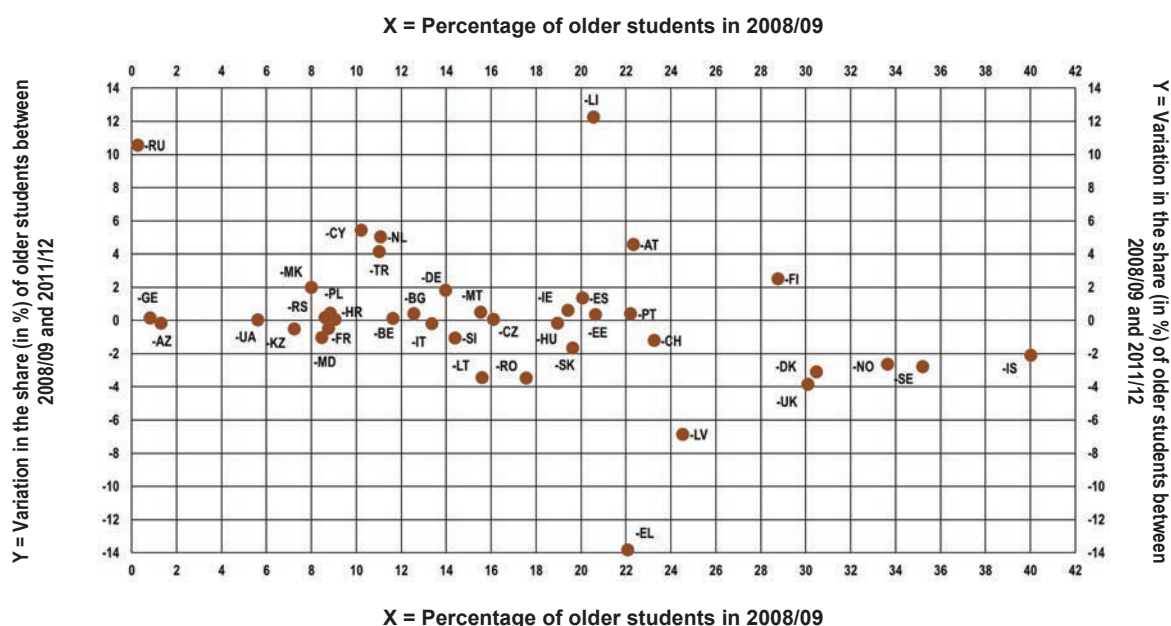
Moldova: data only cover ISCED level 5

Source: Eurostat, UOE and additional collection for the other EHEA countries.

The percentage of students aged 30 and over in the total student population varies significantly across EHEA countries for which data is available: it ranges from less than 2 % (Russia, Azerbaijan and Georgia) up to around 38 % in Iceland. The country median (academic year 2011/12) is 15.8 % meaning that half of the countries have lower share than 15.8 % of mature students, while the other half has more than that. In nearly half of the EHEA countries for which data is available, the share of over 30-year-old students is larger among female students than male students. This pattern is especially observed in the Nordic countries (which combine this feature with high percentages of “mature students”) and in the Baltic countries. The gap between male and female students is also significant in Slovakia, Russia and Hungary where the proportion of ‘mature students’ is around 1.3 times higher among female students than among male students. In few countries, the percentage of “older students” is nearly similar among male and female students. This is for instance what is observed in the Czech Republic, Bulgaria, Georgia, Slovenia, Kazakhstan and Ireland.

As Figure 5.14 shows, out of the 40 EHEA countries for which data is available, nearly half has registered a decrease (but sometimes very moderate) in the percentage of students aged 30 or more in the total student population between 2008/09 and 2011/12.

Figure 5.14: Percentage of students enrolled in tertiary education, 30 or more years old, in 2008/09 and variation from 2008/09 to 2011/12



	IS	SE	NO	DK	UK	FI	LV	CH	AT	PT	EL	EE	LI	ES	SK	IE	HU	RO	CZ	LT
2008/09	40.0	35.2	33.7	30.5	30.1	28.8	24.5	23.3	22.3	22.2	22.1	20.7	20.6	20.1	19.6	19.4	19.0	17.6	16.1	15.6
2008/09-2011/12 (variation in pp)	-2.1	-2.8	-2.7	-3.1	-3.9	2.5	-6.9	-1.2	4.6	0.4	-13.8	0.3	12.3	1.3	-1.7	0.6	-0.2	-3.5	0.1	-3.5
	MT	SI	DE	IT	BG	BE	NL	TR	CY	HR	PL	FR	RS	MD	MK	KZ	UA	AZ	GE	
2008/09	15.5	14.4	14.0	13.4	12.6	11.6	11.1	11.0	10.2	9.1	8.8	8.8	8.6	8.5	8.0	7.3	5.63	1.31	0.83	
2008/09-2011/12 (variation in pp)	0.5	-1.1	1.8	-0.2	0.4	0.1	5.0	4.1	5.4	0.0	0.4	-0.5	0.2	-1.0	2.0	-0.5	0.03	-0.18	0.14	

Notes:

Greece: 2008 reference year, variation in the share between 2008 and 2012. Moldova: data only cover ISCED 5A and 6. [To be included].

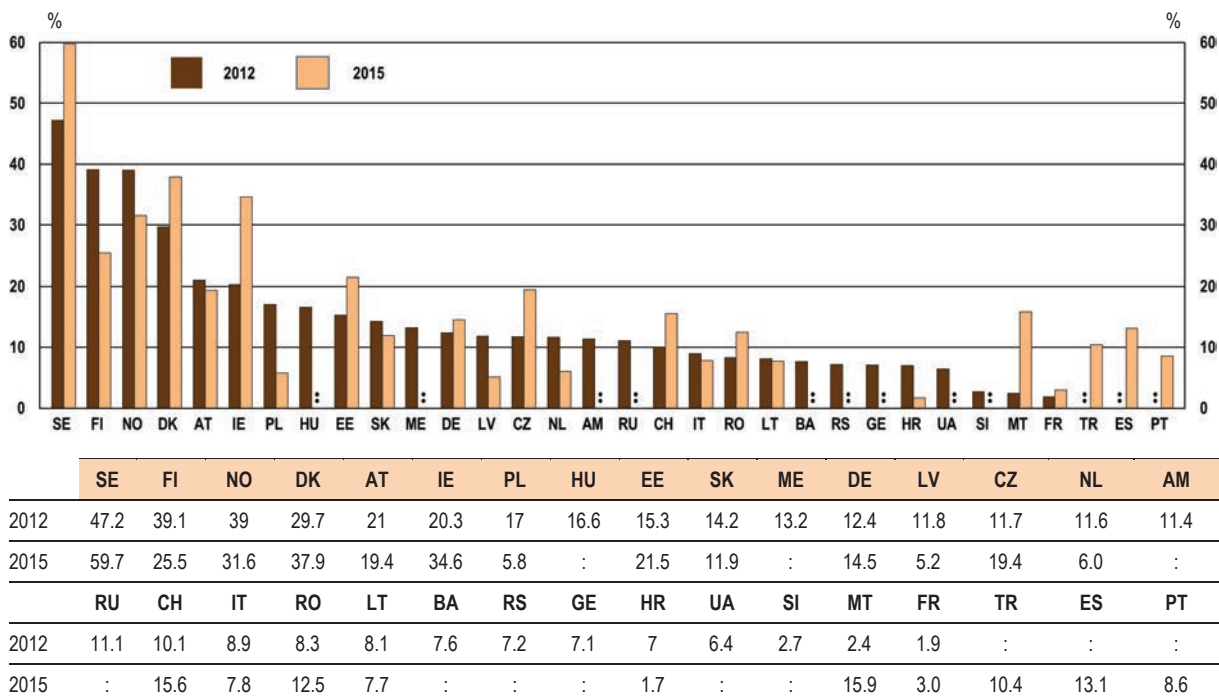
Source: Eurostat, UOE and additional collection for the other EHEA countries.

The strongest decrease in such a share is observed in Greece (where the percentage of older students moved from 22 % in 2007/08 to 8 % in 2011/12), in Latvia (a 6.9 percentage point decrease) and the United Kingdom (a 3.9 percentage point decrease). In many countries the proportion of older students did not change significantly between 2008/09 and 2011/12 with absolute changes of one percentage point or less between these two reference years. Such stability occurred either in countries where the proportion of older students is low (e.g. below 5 % in Azerbaijan, Georgia or below 10 % in Moldova, Kazakhstan, France, Ukraine, Croatia, Serbia and Poland) or in EHEA countries where older students represent more than one fifth of the total population (e.g. in Estonia and Portugal). The Netherlands, Cyprus and Liechtenstein recorded significant increase in the share of old students with increases of 5, 5.4 and 12.3 percentage points respectively between the two reference years.

One indication of the extent to which higher education systems provide lifelong learning opportunities can also be sensed through the level of participation of delayed transitions students. These are students who have delayed their entry into higher education for at least two years after completing upper secondary education or another qualification giving access to higher education (for more details see Glossary and Methodological Notes).

Figure 5.15 shows the share of delayed transition students in the overall student population. The share is highest in the four Nordic countries and Austria, where it is over 20 % of the overall student population. The share is less than 5 % in three countries (Slovenia, Malta and France). Compared to the last reporting exercise, the largest decrease in the share of delayed transition students took place in Sweden, Ireland and Malta (over 10 percentage points), while the largest increases were found in Finland and Poland (over 10 percentage points). It is difficult to assess what might account for these differences. Any changes in the share of delayed transition students could be explained by, among other things, changes in the number of students entering higher education later, changes in the number of graduating students who have been delayed transition students when entering, or the number of years of study.

Figure 5.15: Share of delayed transition students in the overall student population among respondents, 2013/14 in %

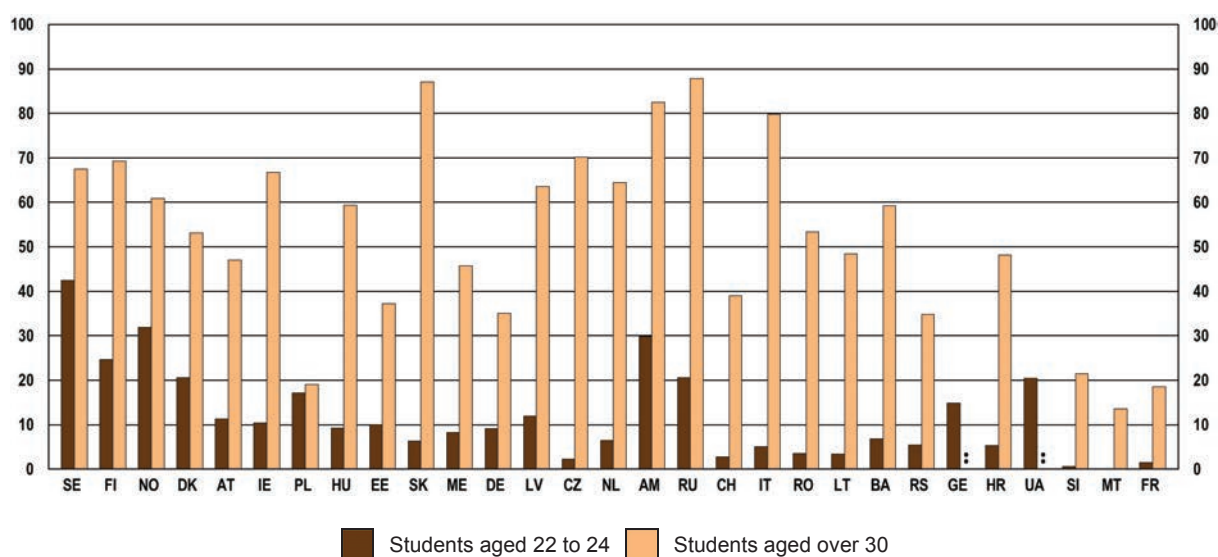


Source: Eurostudent.

The last reporting exercise provided data only for the overall student population without any reference to age. This time, however, the data shows how students in two different age groups (22 to 24 year-olds and over 30 year-olds) responded to the survey, see Figure 5.15), allowing a more detailed analysis.

Delayed transition in the younger age group is highest in the Nordic countries, with over 20% of students (even over 40 % in Sweden). This level of delayed transition indicates a clear cultural practice, suggesting that taking time out for gap years or work experience is a societal norm. Armenia and Russia also show relatively high levels of delayed transition in this age group. At the other end of the spectrum, seven countries (Romania, Lithuania, Switzerland, the Czech Republic, France, Slovenia and Malta) have less than 5 % of delayed transition students in this age group. Again this suggests that the cultural norm is to move quickly into higher education after completing upper secondary education.

Figure 5.16: Share of delayed transition students among respondents, by age, 2013/14



Source: Eurostudent.

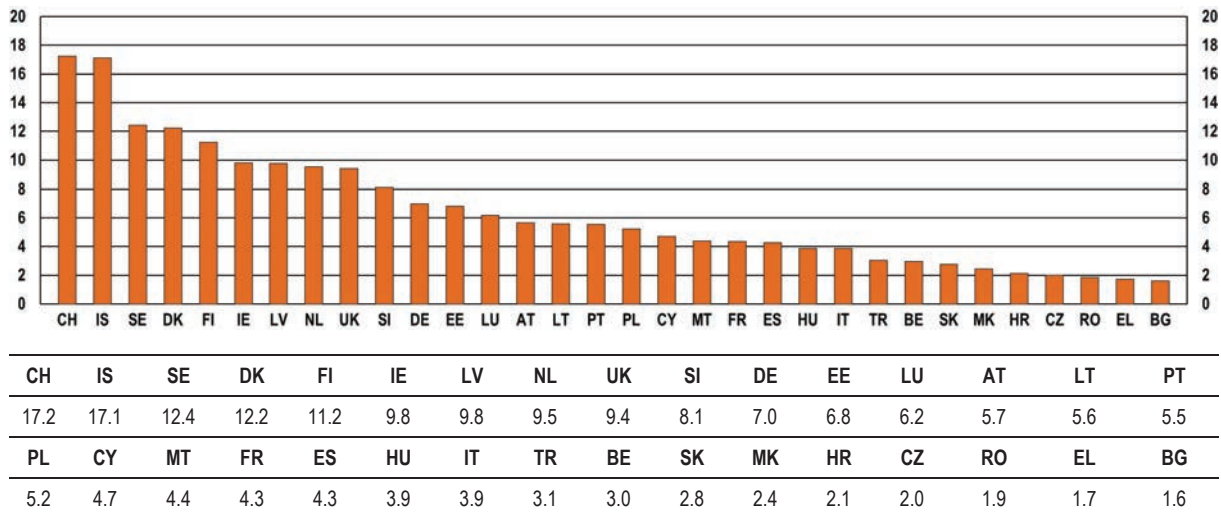
	SE	FI	NO	DK	AT	IE	PL	HU	EE	SK	ME	DE	LV	CZ	NL
22-24yo	42.5	24.6	31.9	20.6	11.3	10.4	17.2	9.3	10.0	6.3	8.2	9.1	11.9	2.3	6.5
>30	67.5	69.3	60.9	53.1	47.0	66.7	19.1	59.4	37.2	87.1	45.8	35.1	63.6	70.2	64.5
	AM	RU	CH	IT	RO	LT	BA	RS	GE	HR	UA	SI	MT	FR	
22-24yo	29.9	20.6	2.8	5.0	3.5	3.4	6.9	5.4	14.8	5.3	20.4	0.6	0.0	1.5	
>30	82.5	87.9	39.0	79.8	53.4	48.4	59.2	34.8	48.2	48.2	21.5	13.6	18.6		

The share of students with delayed transition in the older age group is higher than in the younger age group, indicating that in this age group it is common for students to start their studies at least 24 months after finishing upper secondary education. In many cases, this may be explained by students who move into the labour market with an upper secondary qualification and then decide, for whatever reason to pursue higher education at a later stage in their life. However, it is interesting to note the range in the indicator in different countries. In some countries, such as Malta, Poland, France and Slovenia, more than 80 % of students in this age category are not delayed transition students, and therefore completed an upper secondary or equivalent qualification within the two years prior to entry to higher education. This may indicate, for example, an impact of second chance education or the development of recognition of prior learning. On the other hand, in countries such as Armenia and Russia almost nine out of ten entrants in this age group are delayed transition students. Here the explanation is more likely to be a choice to pursue higher education related to the labour market situation.

In Slovakia, the Czech Republic and Italy, for example, the share of delayed transition students in the younger age group is very low (less than 7 %), while in the older age group it is over 70 %, indicating a large share of mature students starting their studies relatively late.

To conclude this section, the question may be raised about the extent to which lifelong learning opportunities offered by higher education institutions contribute to raising educational attainment of the European population. The EU Labour Force Survey (EU LFS), which enquires about respondents' highest qualification and the age at which it was achieved, can be used to answer this question for several EHEA countries (Figure 5.17).

Figure 5.17: Adults (30-64) who acquired their higher education degree (ISCED 5 or 6) during adulthood (aged 30 or above) as a percentage of all adults (30-64)



Source: Eurostat, EU LFS.

When looking at the share of adults who achieved their higher education qualification during adulthood (aged 30 or above) in the total adult population, Switzerland and Iceland show particularly high figures. In those countries the adult population (aged 30-64) comprises around 17 % of people who achieved a higher education degree aged 30 or above. For Iceland, data is coherent with Figure 5.13 showing a very high share of mature students in the student population (around 38 %). Switzerland is also among countries where a high proportion of students are aged 30 or above (around 22 % as Figure 5.13 shows). In the three Nordic countries – namely Denmark, Finland and Sweden – there are between 11 % and 12 % of people in the adult population who achieved a higher education degree when they were 30 or older. As shown in this section above, in all these countries, mature and delayed transition students constitute a substantial share of the student population. Relatively high proportion of adults who achieved their higher education degree during adulthood – around one in ten – can be observed in a few additional countries, namely Ireland (9.8 %), Latvia (9.8 %), the Netherlands (9.5 %) and the United Kingdom (9.4 %).

By contrast, there are countries where only a small proportion of adults (less than 2 %) achieved a higher education degree during adulthood. These are Bulgaria (1.6 %), Greece (1.7 %) and Romania (1.9 %). The proportion is also relatively small (less than 4 %) in the Czech Republic (2 %), Croatia (2.1 %), Macedonia (2.4 %), Slovakia (2.8 %), Belgium (3 %), Turkey (3.1 %) and Hungary (3.9 %). As shown in different figures in this section above, in most of these countries, the number of mature students in the student population is low. In some of these countries, they seem to be quite well represented for instance, in the Czech Republic Hungary and Slovakia, having a share of between 15 and 20 % of matures students. However, this is not reflected in the data in Figure 5.17. This could mean that policies to support mature students' participation in higher education has been introduced only recently, or that dropout rates of mature students are quite high. This would deserve further investigation.

Conclusions

Lifelong Learning continues to be a challenging concept and one which needs to be broken down into different elements in order to compare realities across countries. Although recent years have seen dramatic economic and social changes to the higher education landscape and have accentuated the need to develop lifelong learning provision, evidence of major structural changes or national action to respond to such challenges is difficult to find. More commonly, institutions are adapting existing provision to meet new and developing needs.

Lifelong learning is a recognised mission in all higher institutions in most of the EHEA countries. Moreover, higher education institutions have a well-established flexible course provision in many countries, offering various types of distance- and e-learning, in addition to part-time studies. Even though not all countries have an official part-time status for higher education students, students may have *de facto* part-time status while theoretically studying full time.

Financing of lifelong learning is fragmented, but the majority of funding in many countries comes from the general public education budget, with additional funding from private contributions from students and businesses. In most countries part-time students do not make higher contributions to the cost of their education than full-time students, although in eight countries they do. Moreover, the financial support for part-time students is in some countries more limited than for their full-time counterparts. Indeed the two issues are often related as in some countries where part-time students need to make higher financial contributions; the support they receive is lower or does not exist. Hence, in these countries there are no financial incentives to study part-time, so students wishing to study more flexibly may find it difficult to do so.

The concept of lifelong learning is rarely well defined in operational terms in EHEA countries, and where definitions exist, they are in many cases rather vague and they vary across countries. Therefore, it is important to take into account the limitations of lifelong learning as a concept through which the demands of 'new learners' are examined. Adults, or mature students, are often considered as learners whose needs often demand specific solutions when designing study paths. When analysing the challenges of new learners, more emphasis could be placed on how education systems deal with the needs of adult learners, while at the same time taking into account the lifelong learning framework.

CHAPTER 6: EFFECTIVE OUTCOMES AND EMPLOYABILITY

The Bucharest Communiqué

The effective outcomes of higher education, that is, higher education attainment and completion on the one hand, and the employability of graduates on the other have been an important focus of the Bologna Process from the very beginning. The 2012 Bucharest Communiqué further strengthens this output-oriented focus by reaffirming that both raising completion rates and enhancing employability are among the main goals of the 'consolidation' process within the EHEA.

The Bucharest Communiqué renews commitment towards the goal of raising completion rates within the widening participation agenda. It confirms the objective that the student body both '*entering and graduating* from higher education institutions should reflect the diversity of Europe's populations' ⁽¹⁾. In this context, the Communiqué emphasises the need to specifically focus on underrepresented groups in higher education policy.

Regarding the objective of enhancing employability, the Bucharest Communiqué highlights the importance of 'cooperation between employers, students and higher education institutions, especially in the development of study programmes' ⁽²⁾. Such a cooperative project is envisaged to ensure that students are equipped with a combination of transversal skills and up-to-date subject-specific knowledge, enabling them to 'contribute to the wider needs of society and the labour market' ⁽³⁾.

The 2012 Bologna Implementation Report

The 2012 Bologna Implementation Report (European Commission/EACEA/Eurydice, Eurostat and Eurostudent, 2012) showed that a continuously increasing proportion of the population had been obtaining a higher education qualification within the EHEA. However, countries differed regarding the proportion of the student population completing their studies. Moreover, although the majority of EHEA countries reported putting in place policies to increase completion levels, there was a great variety in the scope and content of enacted measures. Only a small minority of countries adopted comprehensive national strategies addressing non-completion.

Statistical information on the labour market situation of graduates showed that obtaining a tertiary qualification improved the employment prospects of young people in almost all countries. However, graduates without work experience faced difficulties entering the labour market, and around 20 % of graduates were over-qualified for the job in which they were employed. This latter percentage remained stable between 2000 and 2010, suggesting that over-qualification rates were influenced more by labour market structures and innovation than by the growing number of students.

Since the publication of the last report, EHEA countries have continued to face the prolonged and deepened impacts of the economic crisis. This chapter illustrates how this has influenced the relative position and prospects of higher education graduates in the labour market, which is necessary for understanding the diversity of higher education policies on retention and employability. In-depth information on employability policies was collected for the first time for this reporting exercise.

⁽¹⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 1, emphasis added.

⁽²⁾ Ibid., p. 2.

⁽³⁾ Ibid.

Chapter outline

This chapter centres attention on outcome-oriented policies in higher education. The first section focuses on higher education attainment and completion, looking at the current situation in the EHEA as well as national policies aiming at raising attainment levels and completion rates. The chapter then turns to the issue of graduates' employability. Firstly it discusses the current labour market situation of higher education graduates, highlighting recent trends to which higher education institutions need to respond. Secondly, it looks at how EHEA countries try to enhance the employability of graduates through various types of policies. The final section presents the conclusions.

6.1. Higher education attainment and completion

The main output of higher education is higher education attainment: the share of the population having obtained a higher education qualification. Attainment levels are steadily rising in the EHEA (Figure 6.1). The Bologna median value is now 37.3 % for the 25-34 age group, 29.4 % for the 35-44 year olds and 22.9 % for the 45-64 age group. This increasing tertiary attainment according to age is the dominating pattern in almost all Bologna countries. It is only Azerbaijan where 45-64 year olds have higher tertiary attainment rates than the youngest age group. However, attainment levels have increased even in this country more recently: 25-34 year olds have higher tertiary attainment rates than 35-44 year olds.

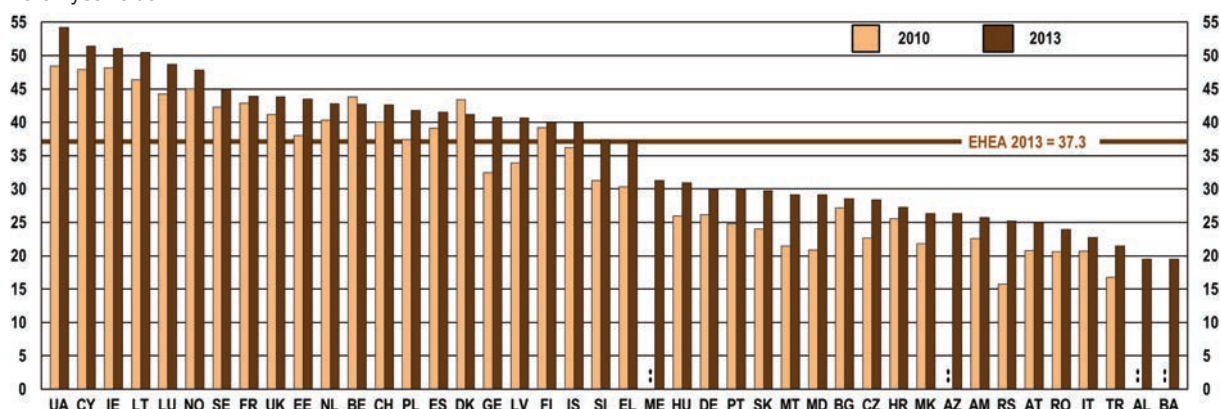
The countries where 35-44 year olds have higher tertiary attainment rates than the youngest age groups are Finland, and to a lesser extent Iceland, Spain, Switzerland and the United Kingdom. This pattern can be explained by the high share of mature students enrolled in tertiary education, particularly in Finland and Iceland (see Figure 5.13). These data show that a substantial share of the 25-34 year olds is still studying and will obtain a tertiary qualification in the future. At the other end of the scale, tertiary attainment rates of 25-34 year olds are more than 12 percentage points higher than those of the 35-44 year olds in "The former Yugoslav Republic of Macedonia", Lithuania and Poland, indicating an expansion in higher education in these countries.

In the youngest age group, higher education attainment has reached 50 % in Ukraine, Cyprus, Ireland and Lithuania. Higher education attainment is the lowest (less than 20 %) in Albania and Bosnia and Herzegovina.

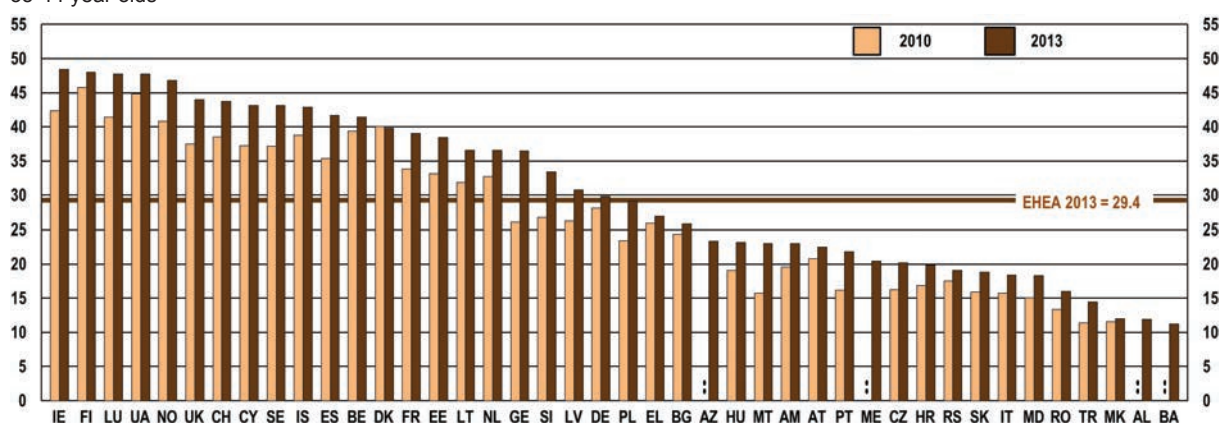
A comparison between tertiary attainment rates in 2010 and 2013 shows the directions of the most recent developments. In this last period, countries with the biggest increases in tertiary attainment among the youngest are Serbia, Moldova and Georgia. The countries where higher education attainment has not increased among the 25-34 year olds since 2010 are Belgium and Denmark.

Figure 6.1: Percentage of persons with tertiary education, 2010 and 2013

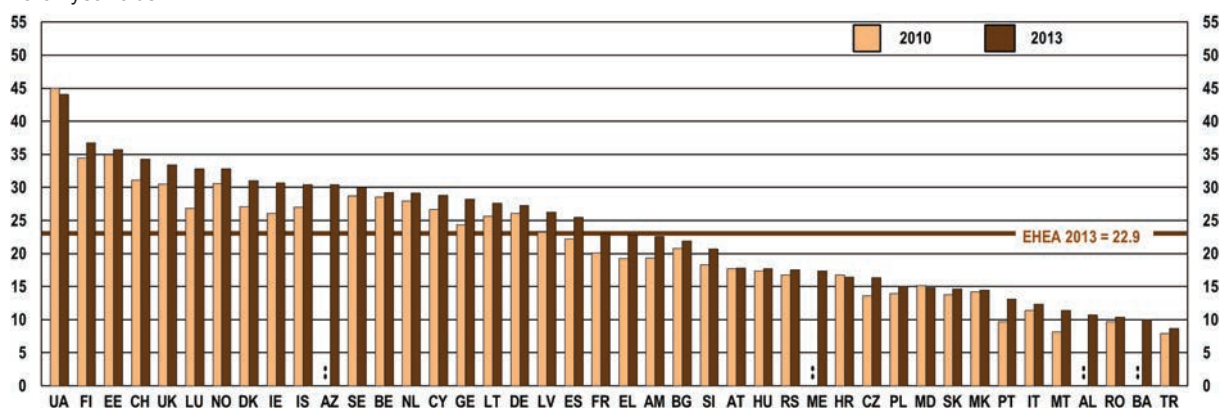
25-34 year olds



35-44 year olds



45-64 year olds



2013	UA	CY	IE	LT	LU	NO	SE	FR	UK	EE	NL	BE	CH	PL	ES	DK	GE	LV	FI	IS	SI
25-34 year olds	54.2	51.4	51.1	50.5	48.7	47.8	44.9	43.9	43.8	43.5	42.8	42.7	42.6	41.8	41.5	41.2	40.7	40.7	40.0	40.0	37.4
35-44 year olds	47.7	43.1	48.4	36.6	47.7	46.8	43.1	39.0	44	38.4	36.6	41.4	43.7	29.1	41.7	39.8	36.5	30.8	48.0	42.9	33.4
45-64 year olds	44.1	28.8	30.7	27.6	32.8	32.8	30.0	23.0	33.4	35.7	29.1	29.2	34.3	15.1	25.5	31.0	28.2	26.2	36.7	30.4	20.7
	EL	ME	HU	DE	PT	SK	MT	MD	BG	CZ	HR	MK	AZ	AM	RS	AT	RO	IT	TR	AL	BA
25-34 year olds	37.2	31.3	30.9	30	30	29.7	29.1	29.1	28.5	28.4	27.3	26.3	26.3	25.7	25.2	25	23.9	22.7	21.5	19.5	19.5
35-44 year olds	26.9	20.4	23.2	29.8	21.8	18.8	23.0	18.3	25.8	20.2	19.8	12.0	23.3	23.0	19.1	22.5	16.0	18.4	14.5	11.9	11.2
45-64 year olds	22.8	17.4	17.7	27.3	13.1	14.6	11.4	14.8	21.9	16.3	16.4	14.5	30.4	22.6	17.5	17.8	10.4	12.3	8.7	10.7	10.0

Notes:

The reference year for Armenia is 2012 instead of 2013.

Data are sorted by the 2013 tertiary attainment levels in each age group separately. The table follows the order of countries in the 25-34 age group. Median values refer to the 2013 tertiary attainment level in each age group separately.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

Raising higher education attainment requires a dual focus on increasing participation (input) and improving completion rates (output). In this context, higher education institutions do not only need to make sure that they have an increasing number of students, but also that these students complete their studies. Increasing participation and completion are also inseparably linked within the widening participation agenda, since students coming from underrepresented groups are more likely to drop out from higher education than their peers (Quinn, 2013; see also European Commission/EACEA/Eurydice, 2014).

Non-completion in higher education can be influenced by a number of factors related to the higher education institution and the individual student. At the individual level, the wrong choice of programme or study subject, insufficient motivation to meet the demands of the curriculum as well as a wide range of other constraints, including financial barriers, health problems and family reasons are among the factors related to dropping out from higher education. Structural barriers and institutional inflexibilities, e.g. the inability to serve the needs of an increasingly heterogeneous student population, may amplify individual risk settings. First-year students – and particularly first-year students from underrepresented groups – are the most vulnerable to dropping out if insufficient attention is paid to their first experiences and skills development. In addition, besides these 'push' factors, 'pull' factors from the labour market may also produce early leavers from tertiary education to some extent.

This section examines current levels of completion within the EHEA as well as national policy approaches towards non-completion and drop-out. First, comparative indicators on completion (completion rates as well as net entry and graduation rates) are analysed. Second, national policies addressing student retention are discussed, with special attention to how EHEA countries focus on and monitor the completion rates of underrepresented groups on the one hand, and first-year students on the other.

6.1.1. Levels of completion in the EHEA

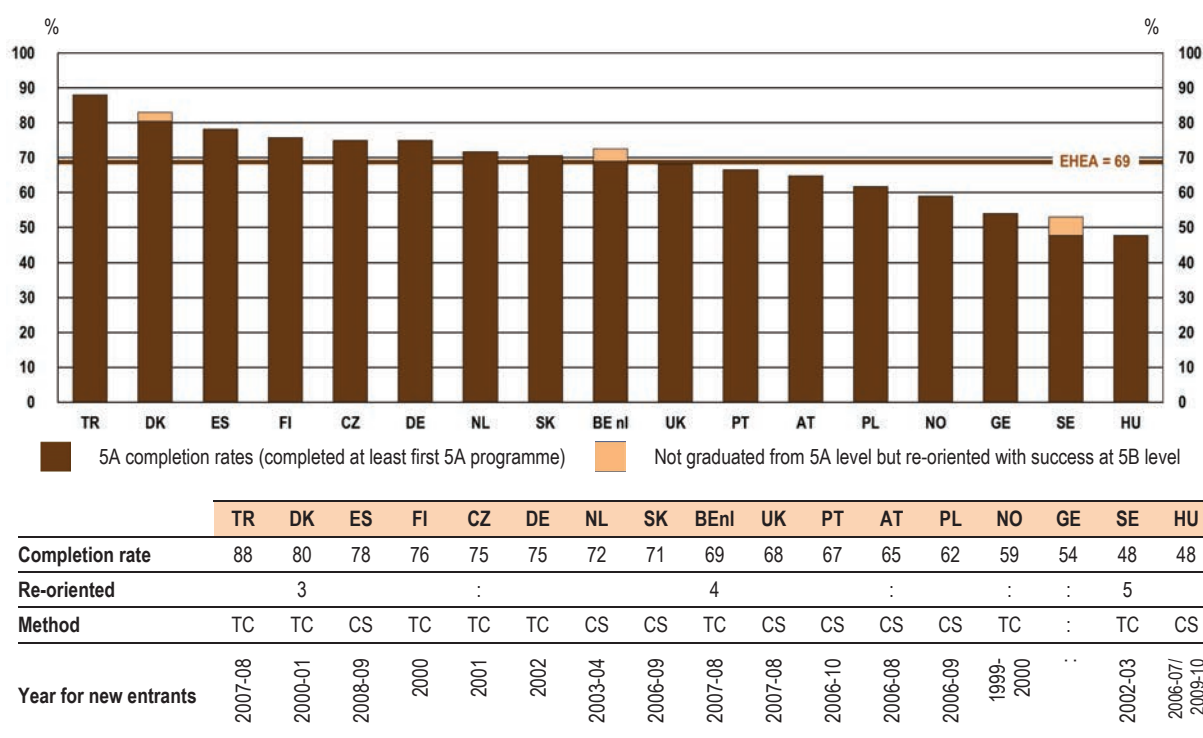
Completion rates

The completion rate shows the share of students who enter and complete their studies (graduate) in tertiary type A programmes (ISCED 5A), expressed as a percentage of all entrants (Figure 6.2). However, instead of having one common international methodology, completion rates are calculated based on two main methods, limiting the comparability of the indicator across countries. The true-cohort method yields the most accurate results but it is very demanding in terms of data since it requires panel data (survey or registers) in which the individual student can be followed through the system from entry to graduation or drop out. In the absence of such data, the indicator relies on the cross-section method in some countries, in which the number of graduates in 2011 is divided by the number of new entrants into these programmes a given number of years before. In some countries, this method accounts for different study durations, in others not.

Completion rates may be influenced by both the academic selectivity within higher education institutions and the selectivity in the admission procedure. Regarding the latter, in countries with more selective admission procedures student success might be higher than in countries with open access to higher education.

Nevertheless, despite this limited comparability across countries and the lack of data for many EHEA countries, this indicator shown in Figure 6.2 is an approximation to the extent to which higher education systems are successful in turning entrants into graduates.

Figure 6.2: Completion rates in tertiary type A programmes (%), 2011



Notes:

CS: Cross-section method. TC: True cohort method. Method unknown: Georgia.

Source: OECD, Education at a Glance 2013, Table A4.1 and additional collection for the other EHEA countries.

The median completion rate among the EHEA countries for which data is available is 69 %. The rate ranges between 88 % in Turkey and 48 % in Hungary and Sweden. Yet, the low completion rate in Sweden must be interpreted with caution because the data include single course students who may have never striven for a whole degree. Moreover, 5 % of new entrants are successfully reoriented towards an ISCED 5B level programme and graduation. Besides Turkey, high tertiary completion rates are observed in Denmark, Spain, Finland, the Czech Republic and Germany, where at least three quarters of all new entrants obtain a degree. In Georgia and Norway on the other hand, completion rates are relatively low, less than 60 %.

Among the countries with available data from 2008 (see European Commission/EACEA/Eurydice, Eurostat and Eurostudent, 2012), completion rates decreased the most in Portugal (19 percentage points) and the United Kingdom (13 percentage points). In the same period between 2008 and 2011, completion rates increased with 8 percentage points in Germany and Slovakia.

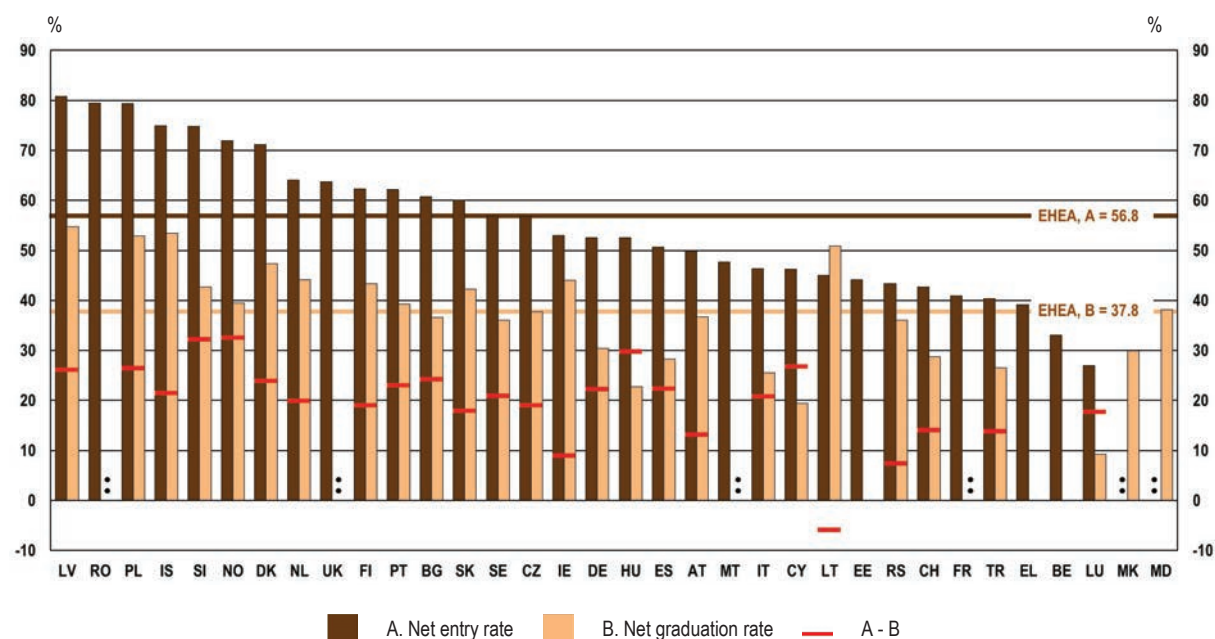
Entry and graduation rates

Because data on completion rates is still scarce among the higher education systems in the EHEA, the indicators presented in this section aim at complementing the rather fragmentary picture by comparing entry and graduation rates as measured in the same academic year. Such a comparison is a proxy for educational progress that can be used as auxiliary information to assess educational outcomes.

The advantage of comparing entry and graduation rates is that data is available for more countries. The entry and graduation rates are the ratio between the number of new entrants and graduates, respectively, of a particular age, and the population size of the same age. Net rates are computed as the sum of entry and graduation rates for all ages (for details on the calculation of the actual indicators, see the Glossary and methodological notes). While completion rates are available for only

17 EHEA systems, entry rates for programmes at the ISCED 5A level are available in 32 systems and graduation rates in 26 systems. Net entry and graduation rates as well as the difference between the two for ISCED level 5A programmes are shown in Figure 6.3, and for ISCED level 5B programmes in Figure 6.4.

Figure 6.3: Net entry rate and net graduation rate (%), tertiary type A programmes, 2011/12



	LV	RO	PL	IS	SI	NO	DK	NL	UK	FI	PT	BG	SK	SE	CZ	IE	DE
A. Net entry rate	80.8	79.4	79.4	74.9	74.8	72.0	71.1	64.0	63.8	62.3	62.2	60.8	60.1	56.9	56.8	53.0	52.6
B. Net graduation rate	54.7	:	52.9	53.5	42.7	39.5	47.3	44.1	:	43.3	39.2	36.6	42.2	36.1	37.8	44.0	30.4
A-B	26.1	:	26.4	21.4	32.2	32.5	23.8	19.9	:	19.0	23.0	24.2	17.9	20.9	19.0	8.9	22.2
	HU	ES	AT	MT	IT	CY	LT	EE	RS	CH	FR	TR	EL	BE	LU	MK	MD
A. Net entry rate	52.5	50.7	49.9	47.7	46.3	46.2	45.0	44.1	43.4	42.7	40.9	40.4	39.1	33.1	27.0	:	:
B. Net graduation rate	22.8	28.3	36.8	:	25.5	19.4	50.9	:	36.1	28.7	:	26.6	:	:	9.2	29.9	38.1
A-B	29.8	22.3	13.1	:	20.8	26.8	-5.9	:	7.3	14.0	:	13.8	:	:	17.7	:	:

Source: Eurostat, UOE data collection and additional collection for the other EHEA countries.

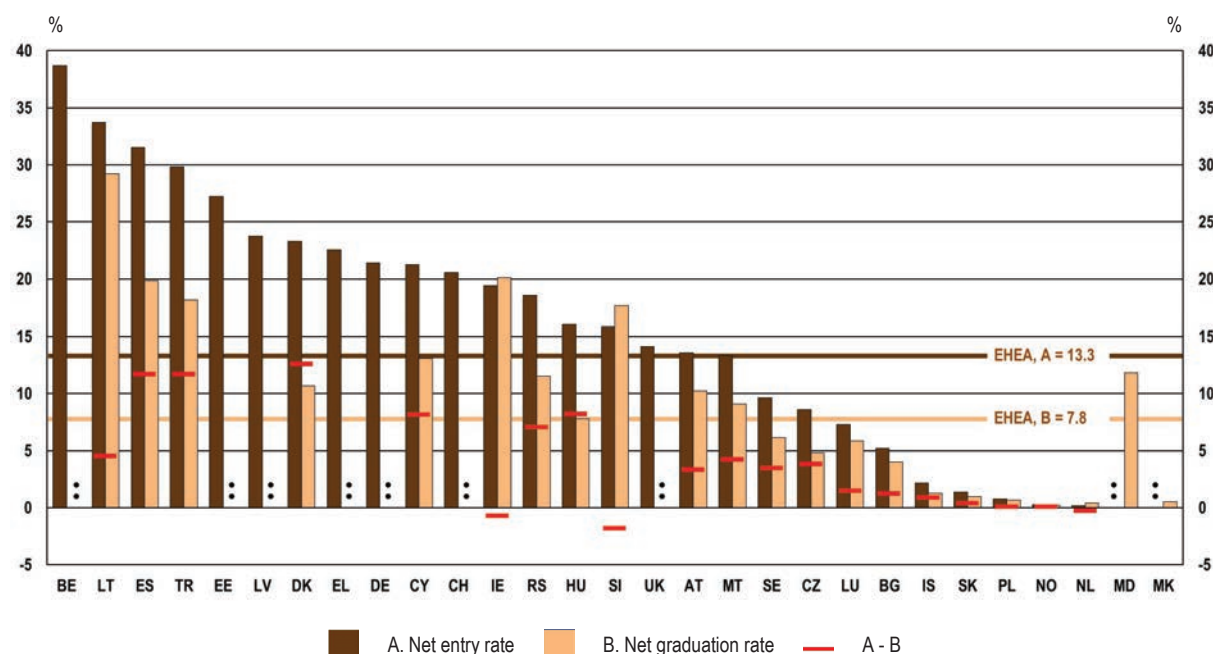
However, while it is clear that high graduation rates can only be achieved if entry rates are high, the difference between the two cannot always be interpreted as the magnitude to which students drop out of higher education institutions. On the one hand, in strongly expanding tertiary systems a comparison between the two is misleading: in these cases, high entry rates and low graduation rates might only reflect increases in entry into higher education. On the other hand, differences in the duration of programmes within and across countries limit the possibility of cross-national comparisons (students entering higher education do not leave it at the same time). Nonetheless, in systems with stable entry and graduation rates, the difference between these rates can indicate the extent of drop-outs.

In the 2011/12 academic year, the median net entry rate was 56.8 % at ISCED level 5A, while the median net graduation rate was 37.8 % ⁽⁴⁾. The median of the difference between the two indicators is 21.1 percentage points. Entry rates into ISCED 5A programmes are highest in Latvia, Romania and Poland, where the rate is around 80 %. In Iceland, Slovenia, Norway and Denmark, entry rates are beyond 70 %. The highest net graduations rates in the EHEA at this level are observed in Latvia, Iceland, Poland and Lithuania, all countries having a net graduation rate of more than 50 %. The

⁽⁴⁾ The median values are calculated based on all 26 systems for which both entry and graduation rates are available and hence the difference between the two can be computed.

lowest net entry rate is observed in Luxembourg with no more than 27 %, while the lowest graduation rates of around 9 % are seen in Luxembourg and Malta. However, in Luxembourg, net entry and graduation rates do not reflect tertiary attainment levels, which are among the highest in the EHEA (see Figure 6.1). This gap results from the fact that Luxembourg has a very small tertiary sector, so young people are studying abroad.

Figure 6.4: Net entry rate and net graduation rate (%), tertiary type B programmes, 2011/12



	BE	LT	ES	TR	EE	LV	DK	EL	DE	CY	CH	IE	RS	HU	SI
A. Net entry rate	38.7	33.7	31.5	29.8	27.2	23.7	23.3	22.6	21.4	21.2	20.6	19.4	18.6	16.0	15.8
B. Net graduation rate	:	29.2	19.9	18.1	:	:	10.7	:	:	13.1	:	20.1	11.5	7.8	17.7
A-B	:	4.5	11.7	11.7	:	:	12.6	:	:	8.1	:	-0.7	7.0	8.2	-1.8
	UK	AT	MT	SE	CZ	LU	BG	IS	SK	PL	NO	NL	MD	MK	
A. Net entry rate	14.1	13.6	13.3	9.7	8.6	7.3	5.2	2.2	1.4	0.8	0.3	0.2	:	:	
B. Net graduation rate	:	10.3	9.1	6.2	4.8	5.8	4.0	1.3	1.0	0.7	0.2	0.4	11.8	0.5	
A-B	:	3.3	4.2	3.5	3.8	1.5	1.2	0.9	0.4	0.1	0.1	-0.3	:	:	

Source: Eurostat, UOE data collection and additional collection for the other EHEA countries.

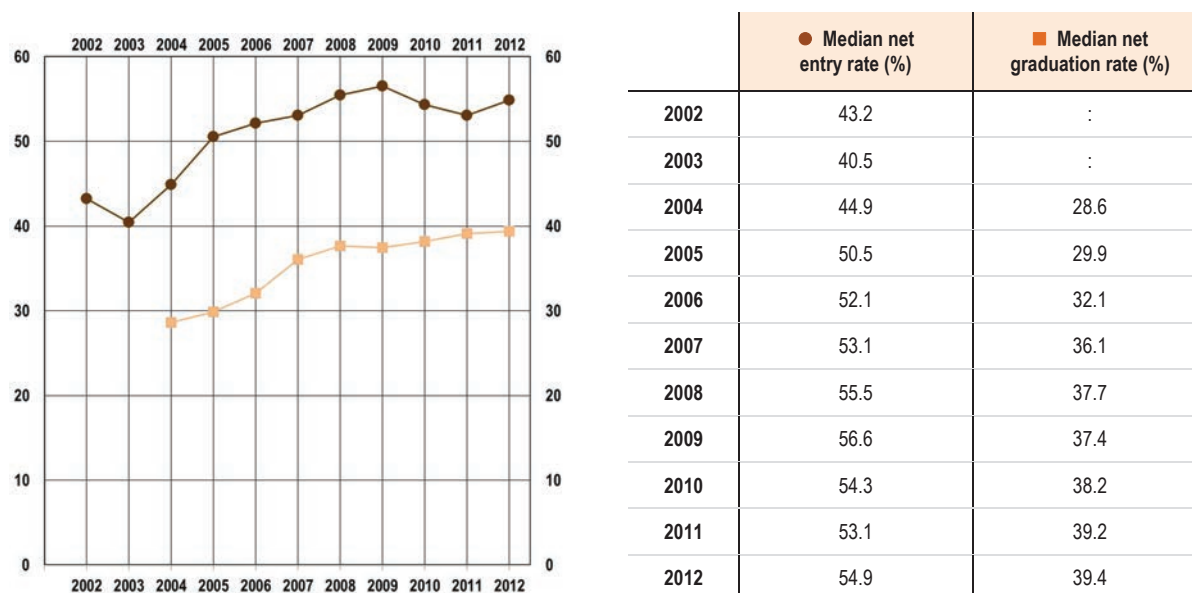
The biggest differences between the net entry rate and the net graduation rate can be seen in Norway and Slovenia, where the two indicators spread by more than 30 percentage points. The lowest entry-graduation-differences of about 9 % or less are observed in Ireland and Serbia. However, as noted before, these differences do not necessarily reflect the real drop-out magnitude in these systems. System expansion may confound this result and a large difference is not necessarily associated with a high dropout rate. Nonetheless, if the difference between the entry and the graduation rate is high *and* the completion rate as depicted in Figure 6.2 is low, as is the case for example in Hungary, this is an indication that the system has a drop-out issue.

With respect to ISCED 5B level programmes, the respective median levels in 2011/12 were 13.3 % (net entry rate) and 7.8 % (net graduation rate). Entry rates into ISCED 5B programmes are highest in Belgium (38.7 %), Lithuania (33.7 %) and Spain (31.5 %). In Belgium, more young people enter ISCED 5B programmes than ISCED 5A programmes. In another eight systems the rate is higher than 20 %. At this level, the countries with the largest gap between net entry rates and net graduation rates were Denmark, Turkey and Spain with about 12 percentage points.

The development of the median net entry rate and the median net graduation rate at ISCED level 5A programmes since the academic year 2001/02 (entry rate) and 2003/04 (graduation rate) is depicted in Figure 6.5 (for the country coverage, see the Glossary and methodological notes). While the median net entry rate at ISCED level 5A substantially increased in the EHEA until the academic year 2008/09, when a peak of 56.6 % was reached, a dip followed in the course of the financial crisis, and in the academic year 2011/12 the median value for this geographical coverage still remains below the peak value. Thus, while higher education attainment (Figure 6.1) and enrolment rates (Figure 1.4) are still increasing, higher education expansion has come to a halt or at least slowed down on average in the EHEA.

The median net graduation rate at ISCED level 5A also shows a substantial increase until 2007/08. However, unlike the entry rate, the median graduation rate remained fairly stable afterwards and amounted to just below 40 % in the most recent academic year. As a result, the gap between the median entry rate and the median graduation rate at ISCED level 5A has decreased in recent years, from more than 20 percentage points around 2006 to 15.5 percentage points. However, given the time lag between the two rates, the net graduation rate might simply not reflect changes in the net entry rate yet.

Figure 6.5: Median net entry rate and median net graduation rate (%), tertiary type A programmes, by academic year, 2001/02 – 2011/12



Source: Eurostat, UOE data collection and additional collection for the other EHEA countries.

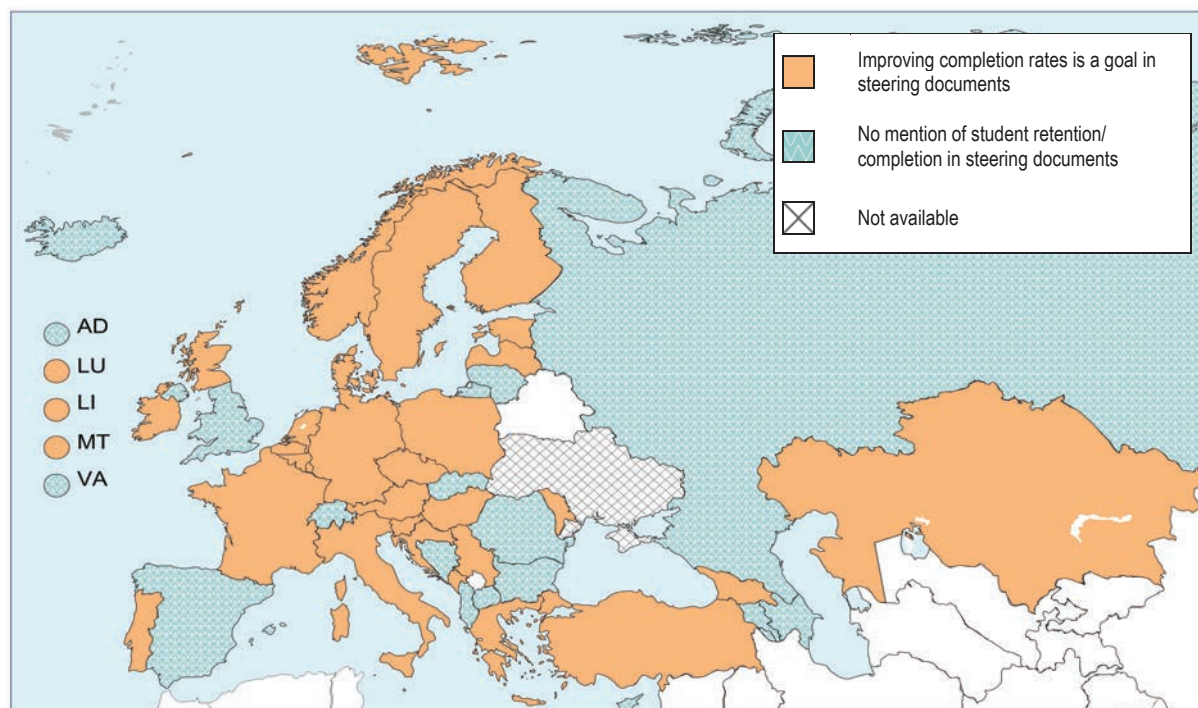
6.1.2. Policies for improving completion rates

After examining the complex picture on completion and drop-out in the EHEA, this section provides an overview on national policies aiming to improve higher education institutions' performance in this regard. The section starts with presenting the main directions of national policy frameworks, and then turns to the analysis of two types of measures: first, on the retention of first-year students, who are the most likely to drop out of higher education; and second, on incentives given to students to finalise their studies on time. Finally, monitoring and evaluation mechanisms are examined, focusing on the monitoring of underrepresented groups as well as on performance-based incentives given to higher education institutions to improve completion rates.

Policy framework

Raising completion rates is an objective of higher education policy in the majority of EHEA countries (Figure 6.6). This main aim is seen to be dependent on two related policy goals: reducing drop-out rates on the one hand, and shortening the time before graduation on the other.

Figure 6.6: References to student retention/completion in steering documents, 2013/14



Source: BFUG questionnaire

Some countries have even set national targets related to these goals. Many countries have targets on tertiary attainment (see also Chapter 4); but in addition, some also specify targets on completion, drop-out, or study time. Regarding completion rates, Finland and Serbia aim to raise the completion rate in higher education by 2020 to 75 % and 70 % respectively. France defines various success rates to be reached by 2015: 42 % in first cycle university studies, 80 % in the second cycle, and 42 % in doctoral studies. These latter targets show awareness about evident retention problems in the first and the third cycles in France.

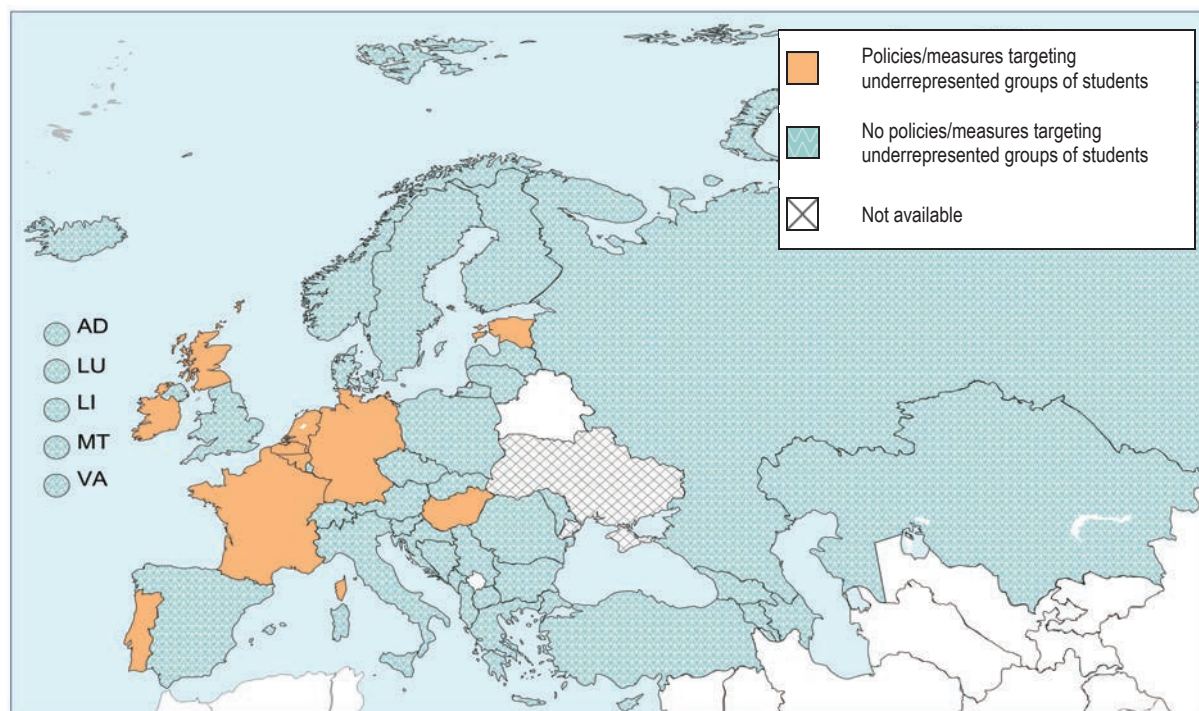
Concerning drop-out, Slovenia aims to lower it by two-thirds from the current 35 % by 2020, while Montenegro targets a 10 % drop-out rate by 2020. France concentrates efforts on specific programmes: there the objective is to lower the share of drop-outs from DUT (*Diplôme universitaire de technologie*), BTS (*Brevet de Technicien Supérieur*) or equivalent programmes to 17 % by 2015.

Finally, in relation to shortening study time, Denmark aims to reduce the average study time by 4.3 months by 2020. Higher education institutions might also be required to set their own targets regarding completion or drop-out rates, for example in performance agreements (e.g. in Austria, Croatia, Denmark, Liechtenstein and the Netherlands).

Steering documents in the EHEA list several potential measures higher education institutions are encouraged to take in order to improve completion rates. Such measures include providing guidance and counselling services to students; offering learning support or remedial activities; developing tailor-made courses, flexible pathways or a family-friendly learning environment; and providing incentives to students to finish their studies on time.

In the large majority of countries, such measures aim to improve the completion rates for all students, without paying specific attention to those who are more likely to drop out early: non-traditional students. Despite the fact that raising completion rates is part of the widening participation agenda in the Bologna Process, underrepresented groups are targeted by policy-makers in only ten higher education systems of the EHEA (see Figure 6.7): Belgium (Flemish and French Communities), Estonia, Germany, France, Hungary, Ireland, the Netherlands, Portugal and the United Kingdom (Scotland).

Figure 6.7: Policies/measures on retention/completion targeting underrepresented groups of students, 2013/14



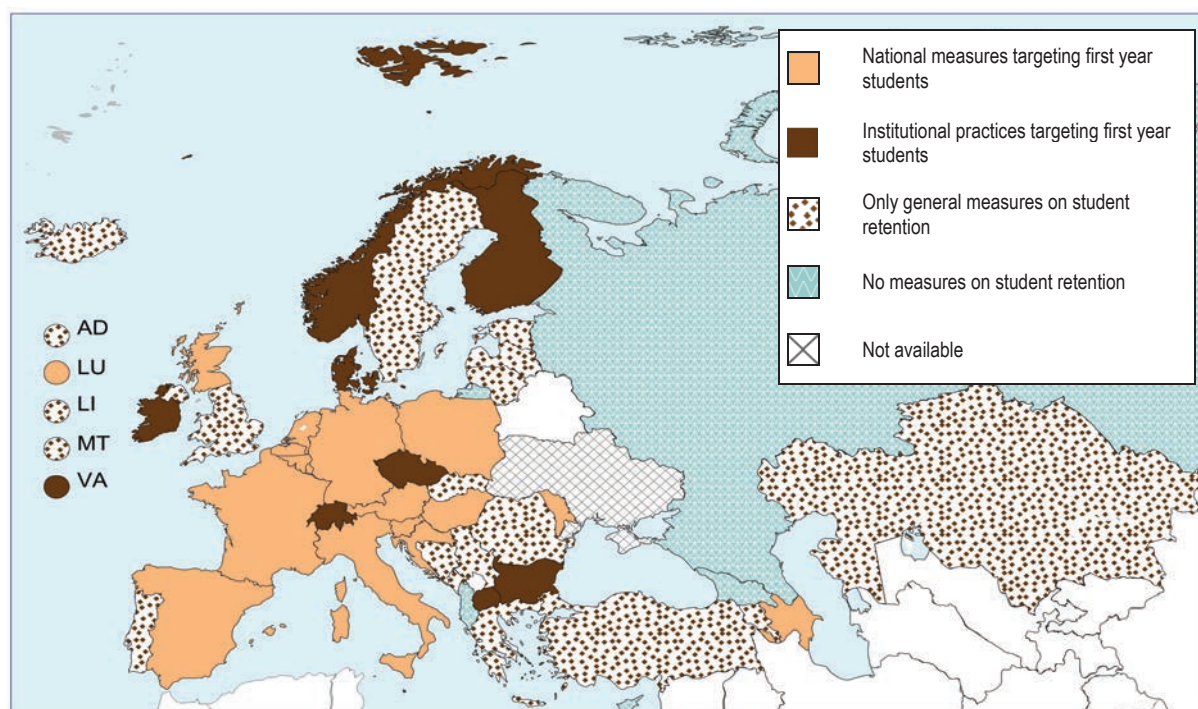
Source: BFUG questionnaire

Moreover, the definition of underrepresented groups differs widely in these countries. Thus policies focus on, inter alia, students with lower socio-economic background (defined based on various criteria in Belgium (Flemish and French Communities), Germany, Hungary, Ireland, Portugal, the United Kingdom (Scotland)), students with parents without a given level of education qualification (Belgium (Flemish and French Communities), Germany, Hungary), adult or mature students (Belgium (Flemish Community), the United Kingdom (Scotland)), students combining work and study (Belgium (Flemish Community)), students with disabilities (Belgium (Flemish and French Communities), Germany, France, Hungary, the United Kingdom (Scotland)), students with children (Germany, Hungary), ethnic or language minorities (Belgium (Flemish Community), Estonia, Hungary, the Netherlands, the United Kingdom (Scotland)), or immigrants (Belgium (Flemish Community), Germany).

Reducing drop-out: improving the retention of first year students

Research indicates that drop-out rates are the highest at the end of the first academic year. First-year students are particularly vulnerable to dropping out of higher education, since their expectations might be very different from what they actually encounter. Such mismatch can stem from the wrong choice of courses or study programme as well as the feeling of helplessness and failure at the start of higher education studies. For this reason, paying attention to newly admitted students' experiences and skills development is of particular importance. Yet, only about half of the EHEA countries have developed policy and practice focusing specifically on the retention of first-year students (Figure 6.8).

Figure 6.8: Targeting the retention of first-year students, 2013/14



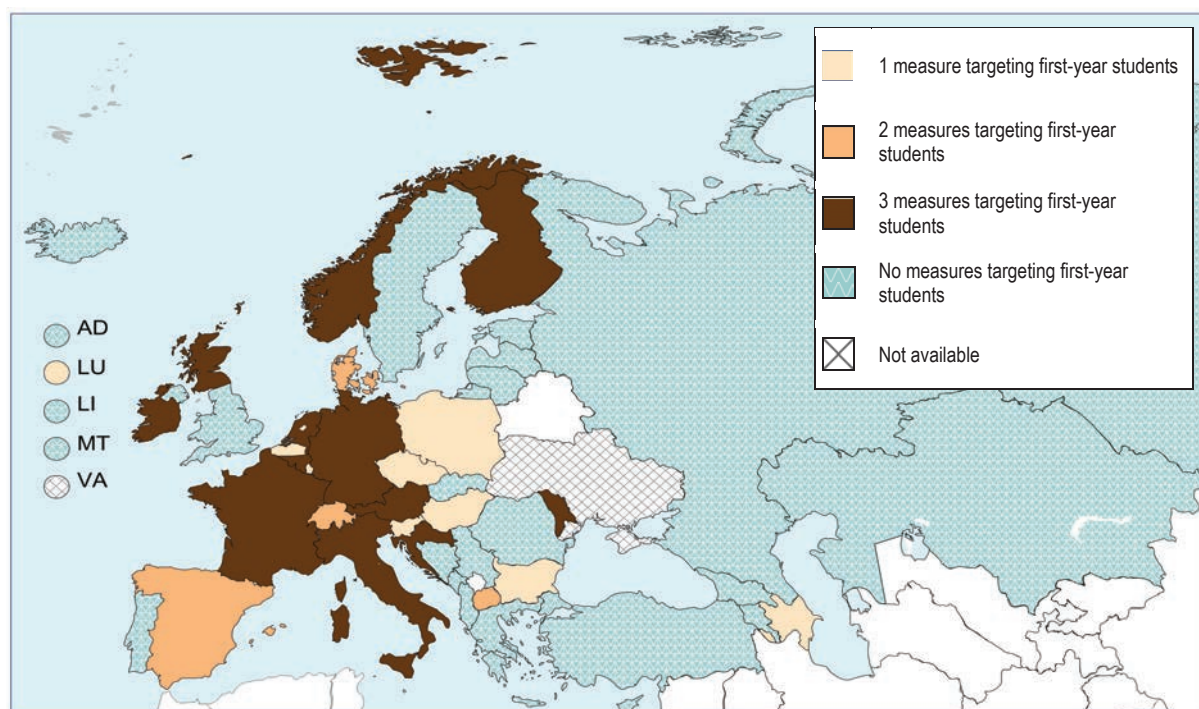
Source: BFUG questionnaire

The three most common measures helping first-year students in adjusting to the new learning environment in higher education institutions are introductory or insertion courses (that typically take place at the beginning of the academic year), tutoring or mentoring programmes (by fellow students or by academic staff), and support provided to students to acquire learning and/or organisational skills (through specific courses or individual support).

As Figure 6.9 depicts, among the countries targeting first-year students, around half (twelve countries) apply all three measures. In Denmark, Spain, and Switzerland, students can benefit from introductory courses and tutoring or mentoring programmes, whereas in "The former Yugoslav Republic of Macedonia", introductory courses are combined with support given to students to acquire learning and/or organisational skills. Bulgaria, the Czech Republic, Poland and Slovenia rely on introductory courses, while institutions in Azerbaijan, Belgium (Flemish Community), Hungary and Luxembourg primarily provide support to students to acquire learning and/or organisational skills.

Though first-year students are treated as a whole in most cases, examples of targeted measures also exist. For example, in Germany, The Quality Pact for Teaching (*Qualitätspakt Lehre*) and the 'Advancement through Education: Open Universities' (*Aufstieg durch Bildung: Offene Hochschulen*) programmes of the Federal Government and the *Länder* support projects at higher education institutions to improve the entrance phase for various target groups (people with vocational qualifications, students with a migration background, etc.) and/or assist higher education institutions with the implementation of diverse and diversified counselling. In Hungary, through the HÖÖK Mentoring Programme, a number of students with lower socio-economic background are supported by a personal mentor (a fellow student) in their first academic year.

Figure 6.9: Application of main measures targeting the retention of first-year students, 2013/14



Source: BFUG questionnaire

In addition, countries might also aim at lowering the chance of academic failure (or the sense of failure) by allowing students to retake exams multiple times or, as in Germany, to aim for abandoning examination-relevant marking for first-year students.

Pre-admission support is also provided to prospective students in many higher education systems (see Chapter 4 for more details). For example, in the Netherlands, new students can have a study choice talk with their institutions before the start of the first academic year. In Switzerland, some higher education institutions offer online self-assessment surveys helping prospective students to identify whether their expectations and skills match the requirements of a study programme.

Shortening study time

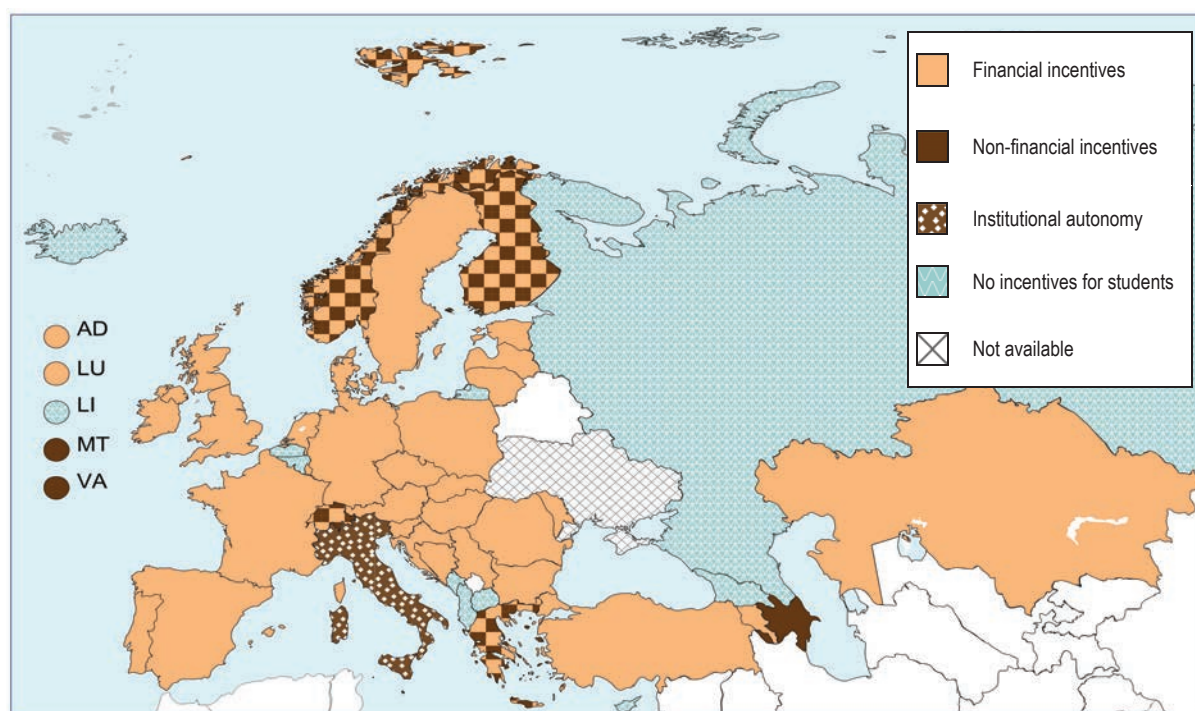
A common way to improve completion rates is to give incentives for students to finish their studies within a limited period of time. Indeed, the large majority of countries in the EHEA provide financial or non-financial incentives to students to ensure the timely completion of higher education studies (Figure 6.10).

Non-financial incentives are typically about limiting the number of years in which students can finalise their studies. Other measures include, for example, students signing an 'Individual Education Plan' in Norway, through which students' progression can be followed up and non-fulfilment can be acted upon.

Financial incentives can be negative (support is taken away or extra fees are foreseen in case of non-completion) or positive (students receive extra support in case they study faster). Negative financial incentives are much more common in the EHEA. Most frequently, students stop receiving support (e.g. in Finland, France or the United Kingdom) or even have to pay extra fees if they do not finish their studies on time (e.g. in Armenia, the Czech Republic, Estonia, Latvia, Poland, Romania, Slovakia, Spain, Switzerland and Turkey). In Hungary, students even have to pay back the grants received if they fail to complete their studies within a limited period of time. Alternatively, or sometimes in addition, students are only eligible to receive scholarships if they make enough progress in their

studies (e.g. in Andorra, Armenia, Ireland, Kazakhstan, Lithuania, Luxembourg, Moldova, Portugal, Slovenia, Spain, and Sweden). Thus, in these cases, grant entitlements are reviewed periodically during higher education studies.

Figure 6.10: Incentives given to students to finish their studies on time, 2013/14



Source: BFUG questionnaire

Positive financial incentives exist only in a few countries. In Croatia and Estonia, students acquiring a given number of credits are entitled to receive a tuition waiver (Croatia) or a merit-based grant (Estonia). Denmark is introducing a cash bonus for students who complete their studies faster than the required time. In Norway, student loans are converted into grants on the basis of timely and successful progression and completion of studies, while in Sweden, some students in teacher training receive a lump sum after completing their studies. In Portugal, in the so-called 'Retomar' programme, scholarships are awarded to students encouraging their return to higher education.

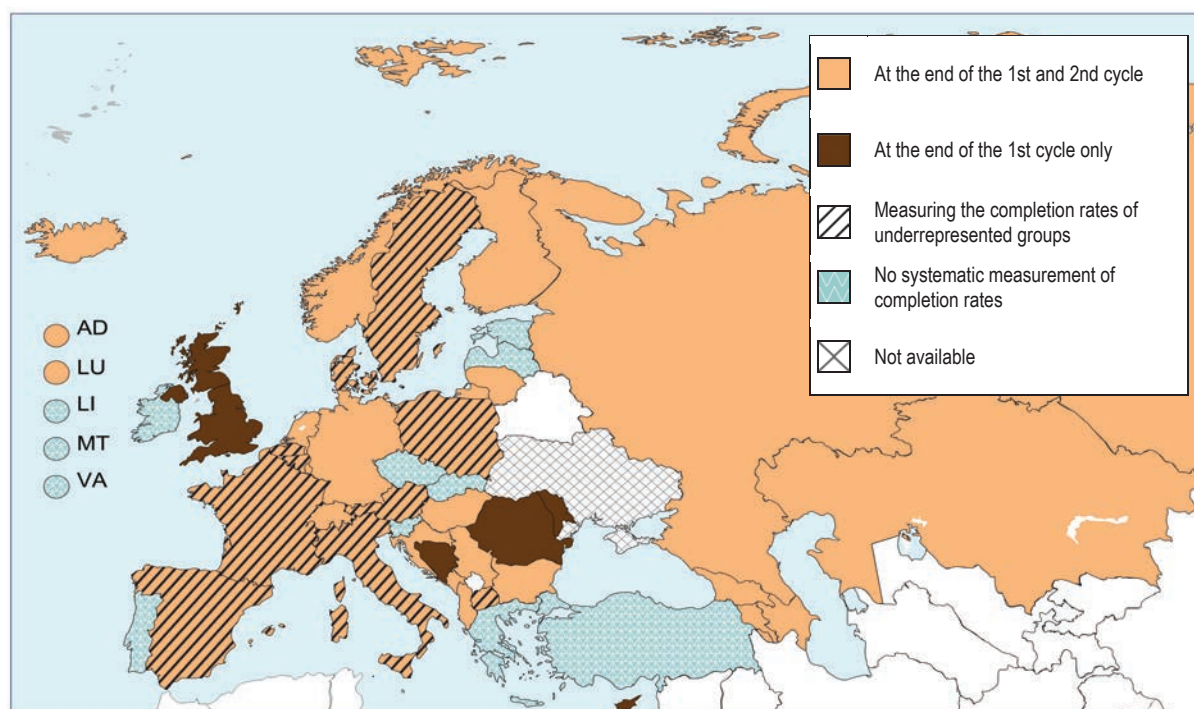
Monitoring and evaluation

The evaluation of higher education institutions' performance is based on the calculation of completion and/or drop-out rates. The majority of EHEA countries systematically measure completion rates at the end of both the first and the second cycle (Figure 6.11). Drop-out rates are also systematically monitored in more than half of the countries, at least at the end of the first year, but most often after each academic year (Figure 6.12).

In most cases, completion and drop-out rates are also publicly available. However, drop-out rates are not made public in Azerbaijan, Belgium (Flemish Community), Croatia, Cyprus, Georgia, Iceland, Moldova, Poland and Russia.

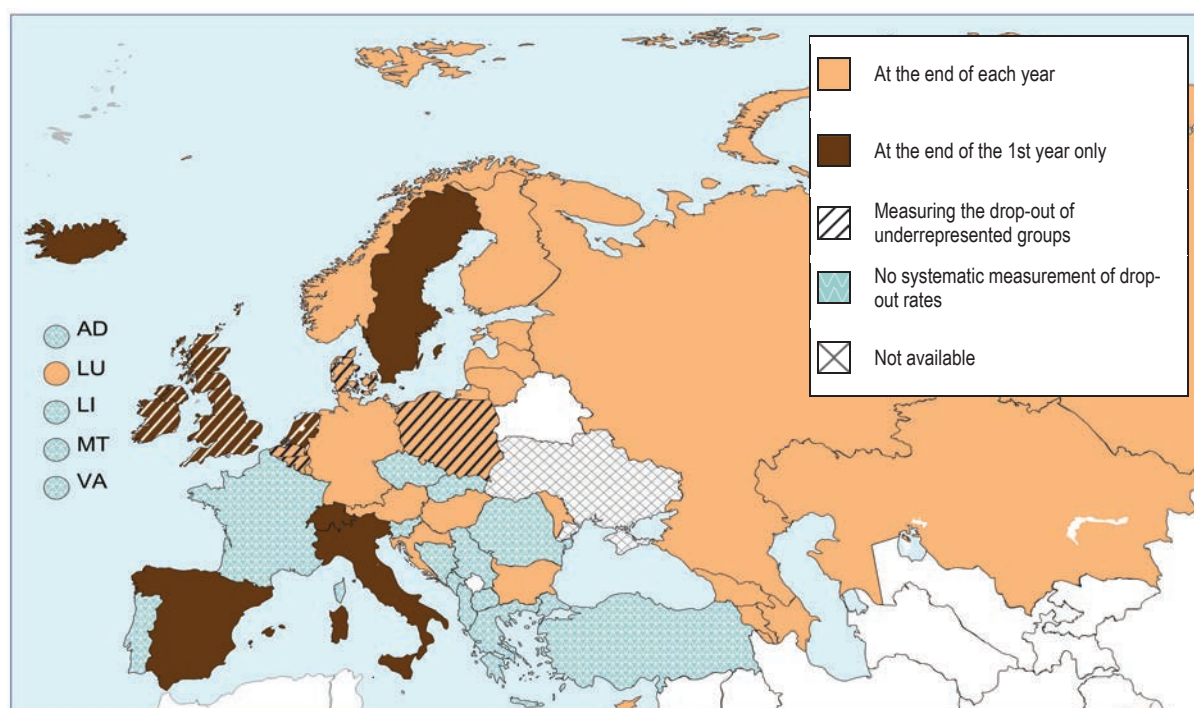
There are eight education systems of the EHEA where neither completion nor drop-out rates are calculated and monitored systematically: the Czech Republic, Greece, Liechtenstein, Malta, Portugal, Slovakia, Slovenia and Turkey. Yet, some form of data collection (at least at the institutional level) on graduates and/or drop-outs takes place also in these countries. For example, the Czech Republic, Portugal, Slovakia and Turkey provide data on completion rates for Eurostat (see Figure 6.2).

Figure 6.11: Systematic measurement of completion rates, 2013/14



Source: BFUG questionnaire

Figure 6.12: Systematic measurement of drop-out rates, 2013/14



Source: BFUG questionnaire

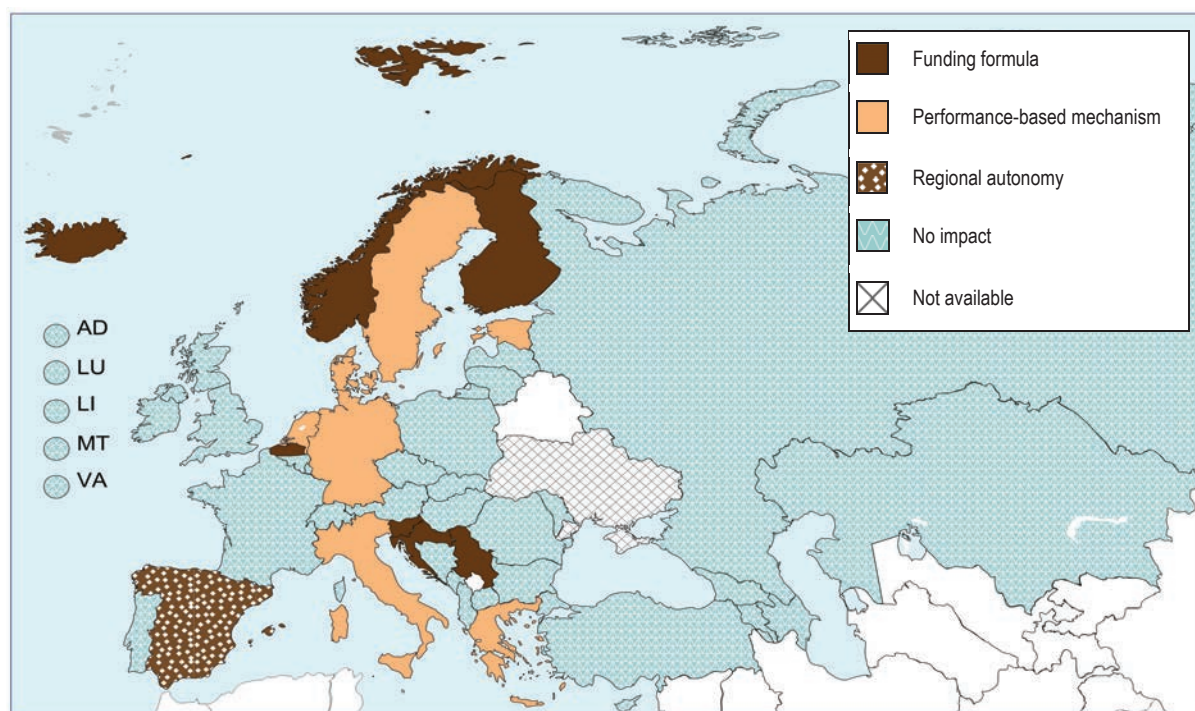
Where completion and drop-out rates are measured, monitoring generally focuses on the whole student population, without looking at different groups of students separately (see Figures 6.11 and 6.12). However, ten higher education systems monitor the completion rates of underrepresented groups: Austria, Belgium (Flemish and French Communities), Denmark, France, "The former Yugoslav Republic of Macedonia", Italy, Poland, Spain and Sweden. Drop-out rates are measured separately for specific groups in Belgium (Flemish and French Communities), Ireland, Denmark, the Netherlands, Poland and the United Kingdom. However, the groups defined are again very different depending on

the country. Common bases of monitoring include gender, age (mature students), socio-economic background and citizenship. Furthermore, it also has to be kept in mind that in several countries, while completion and/or drop-out rates of underrepresented groups of students are monitored, there are no policy measures targeting the retention of these groups.

Regarding evaluation mechanisms using completion and/or drop-out rates, several countries have established procedures outside external quality assurance frameworks in order to rate higher education institutions' performance (on quality assurance, see chapter 3). One such mechanism is the institution of performance agreements that exist for example in Austria, Denmark, France, Germany (in some *Länder*), Liechtenstein and the Netherlands. In such frameworks, higher education institutions sign an agreement with national or regional authorities, in which they define a number of goals related to pre-set indicators. Higher education institutions' performance then can be evaluated based on the performance agreement.

In almost one third of the EHEA countries, higher education institutions' performance even influences the institutions' funding, either through a funding formula, or through performance-based mechanisms (Figure 6.13). In these cases, higher education institutions are given financial incentives to raise completion rates or reduce drop-out.

Figure 6.13: Impact of completion performance on higher education institutions' funding, 2013/14



Source: BFUG questionnaire

Other alternative approaches to evaluation include the application of minimum standards (for example, in Moldova, at least 50 % of students should graduate in order for a programme to be accredited), or benchmarks (for example, in the United Kingdom, performance indicators show the actual performance of higher education institutions against benchmarks).

6.2. Employability of graduates

Within the Bologna Process, employability is understood as 'the ability to gain initial meaningful employment, or to become self-employed, to maintain employment, and to be able to move around within the labour market' (Working Group on Employability 2009, p. 5). In this context, the role of higher education is 'to equip students with the knowledge, skills and competences that they need in the workplace and that employers require; and to ensure that people have more opportunities to maintain or renew those skills and attributes throughout their working lives' (Working Group on Employability 2009, p. 5).

Regarding this definition, it has to be emphasised that employability does not equal employment. The skills and competences students gain during higher education can only enable them to find employment, but do not guarantee it. As was also described in the recent Eurydice report on *Access, Retention and Employability* (European Commission/EACEA/Eurydice, 2014), graduates' employment prospects depend largely on the general state of the economy on the one hand, and their individual characteristics (such as their age, gender, ethnicity or social class) on the other. Regarding this last set of factors, 'non-traditional' learners are at a disadvantage in the graduate labour market. For this reason, graduates' employability could also form part of the widening participation agenda: specific measures can ensure that non-traditional learners do not only access and successfully complete higher education, but can also harvest its benefits by gaining 'meaningful' employment (Ibid.).

Against this background, this section discusses graduates' labour market situation as well as policies aiming to enhance their employability. Indicators on graduates' labour market situation are not directly measuring their employability (i.e. their *ability* to gain employment). However, they do provide valuable information on graduates' employment prospects: on average, how likely it is that they will find a good and meaningful job after graduation. Labour market information can also be used by higher education institutions when they aim to respond to labour market needs.

6.2.1. Graduates on the labour market: transition from education to work

Several indicators can describe graduates' transition from education to work. Section 6.2.1 looks at graduates' labour market situation in EHEA countries based on unemployment ratios, income levels, as well as qualification mismatch. These latter two can serve as indicators for job quality (the 'meaningfulness' of a job).

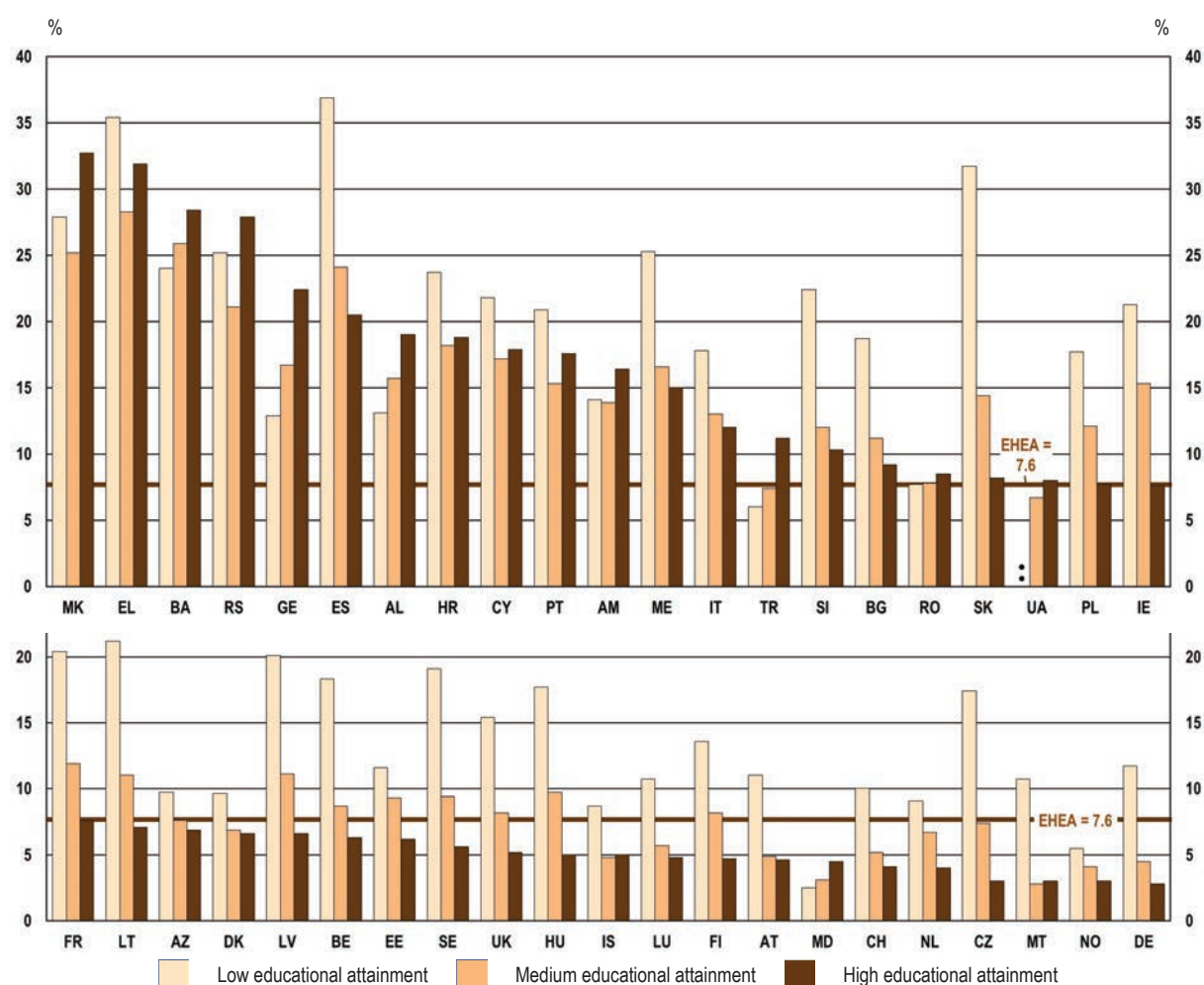
Unemployment

Unemployment ratios comparing the unemployment situation of people aged 20-34 with different educational attainment provide valuable information on the relative value of tertiary education degrees. Rather than looking at unemployment rates, which take the labour force as the denominator in the calculation, the unemployment ratio compares the unemployed to the total population instead of the labour force. Thus it is the more appropriate comparative measure, because it is relatively insensitive to systematic differences in labour market participation across systems that arise from differences in post-compulsory education and training arrangements and in employment regimes. On the other hand, using unemployment ratios instead of unemployment rates also implies that countries with similar unemployment rates can have different unemployment ratios depending on their inactivity rate. For example, countries with a higher share of young people aged 20-34 in education (and thus a higher share of inactive young people) will have lower unemployment ratios.

Figure 6.14 shows unemployment ratios by country in 2013, while Figure 6.15 depicts the average annual growth rate of unemployment between 2008 and 2013.

Comparing 2013 median levels of unemployment ratios shows that the general expectation remains true, that is, the higher the level of education, the lower the unemployment ratio. The EHEA median of unemployment ratios for young people with low educational attainment (at most lower secondary education) is 17.7 %, for those with medium educational attainment (at most post-secondary non-tertiary education) it is 10.4 %, while it is 7.6 % for the highly educated with tertiary education. The biggest gaps between the unemployment ratios of young people with high and low educational attainment are in the Czech Republic (3 % vs. 31.7 %), Germany (2.8 % vs. 11.7 %), and Slovakia (8.2 % vs. 31.7 %). These are the countries where staying in education improves young people's labour market prospects the most. Nevertheless, gaps between the unemployment ratios of the high and the medium skilled are much less pronounced. Countries with the largest differences are the Czech Republic (3 % vs. 7.4 %) and Ireland (7.6 % vs. 15.3 %).

Figure 6.14: Unemployment ratio of people aged 20-34 by educational attainment level (%), 2013



	MK	EL	BA	RS	GE	ES	AL	HR	CY	PT	AM	ME	IT	TR	SI	BG	RO	SK	UA	PL	IE
High	32.7	31.9	28.4	27.9	22.4	20.5	19.0	18.8	17.9	17.6	16.4	15.0	12.0	11.2	10.3	9.2	8.5	8.2	8.0	7.7	7.6
Medium	25.2	28.3	25.9	21.1	16.7	24.1	15.7	18.2	17.2	15.3	13.9	16.6	13.0	7.4	12.0	11.2	7.8	14.4	6.7	12.1	15.3
Low	27.9	35.4	24.0	25.2	12.9	36.9	13.1	23.7	21.8	20.9	14.1	25.3	17.8	6.0	22.4	18.7	7.7	31.7	:	17.7	21.3
	FR	LT	AZ	DK	LV	BE	EE	SE	UK	HU	IS	LU	FI	AT	MD	CH	NL	CZ	MT	NO	DE
High	7.6	7.1	6.9	6.6	6.6	6.3	6.2	5.6	5.2	5.0	5.0	4.8	4.7	4.6	4.5	4.1	4.0	3.0	3.0	3.0	2.8
Medium	11.9	11.0	7.6	6.9	11.1	8.7	9.3	9.4	8.2	9.7	4.8	5.7	8.2	4.9	3.1	5.2	6.7	7.4	2.8	4.1	4.5
Low	20.4	21.2	9.7	9.6	20.1	18.3	11.6	19.1	15.4	17.7	8.7	10.7	13.6	11.0	2.5	10.0	9.1	17.4	10.7	5.5	11.7

Notes:

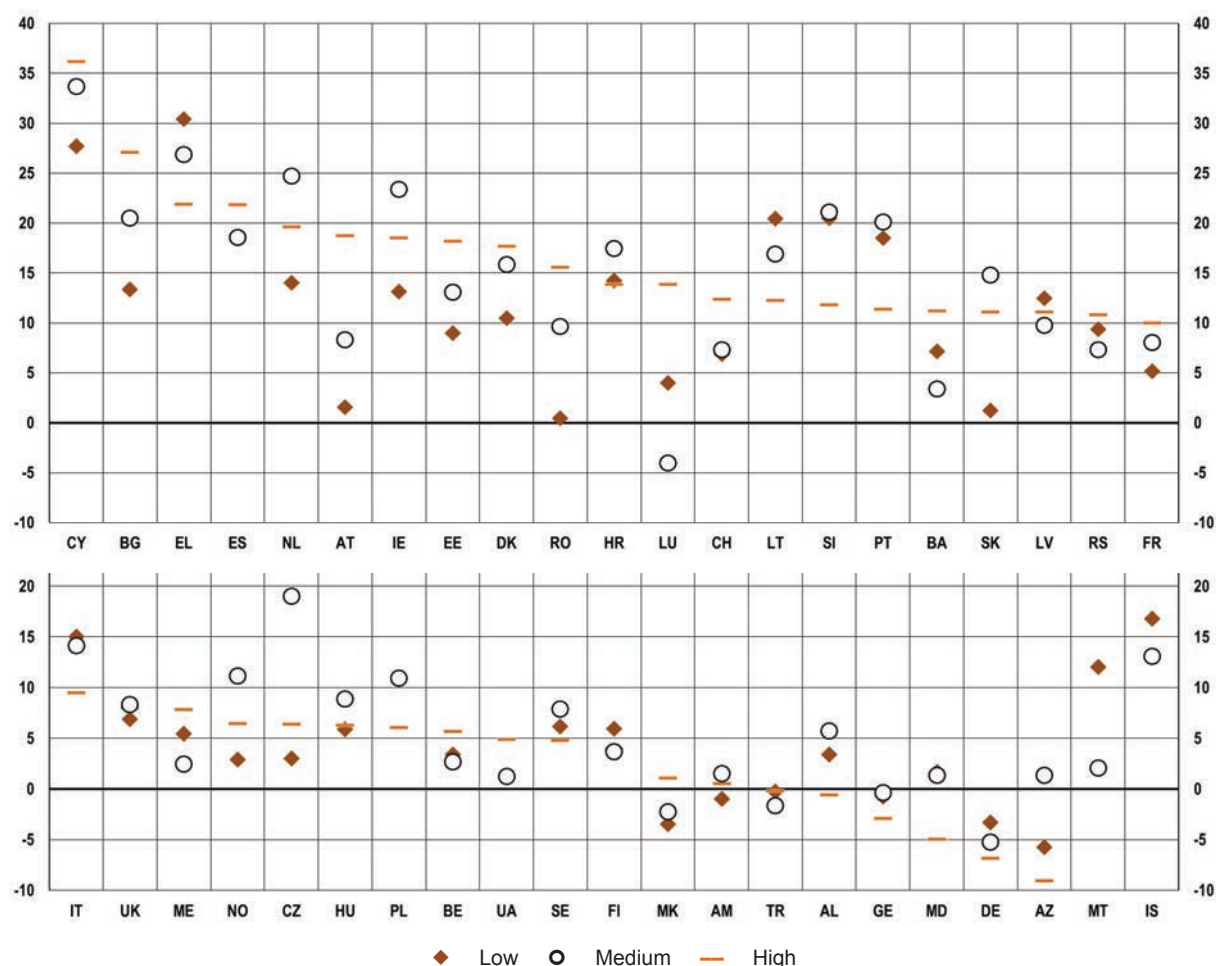
The unemployment ratio is calculated as the share of the unemployed in the total population of a given educational attainment level and age group. High educational attainment: ISCED 5-6, Medium educational attainment: ISCED 3-4 and Low educational attainment: ISCED 0-2.

Data are not reliable in the case of high educational attainment for Malta.

Data are sorted by the unemployment ratio of the highly educated. The median value (7.6%) refers to unemployment ratio of the highly educated.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

Figure 6.15: Average annual growth rate of unemployment by education level (%), 2008-2013



	CY	BG	EL	ES	NL	AT	IE	EE	DK	RO	HR	LU	CH	LT	SI	PT	BA	SK	LV	RS	FR
High	36.2	27.1	21.9	21.9	19.6	18.7	18.5	18.2	17.7	15.6	13.9	13.9	12.3	12.2	11.8	11.4	11.2	11.1	11.1	10.8	10.0
Medium	33.7	20.5	26.9	18.6	24.7	8.3	23.4	13.1	15.9	9.7	17.5	-4.1	7.3	16.9	21.1	20.1	3.4	14.8	9.8	7.4	8.0
Low	27.7	13.3	30.4	18.5	14.0	1.6	13.1	9.0	10.5	0.5	14.2	4.0	6.9	20.4	20.5	18.5	7.1	1.2	12.5	9.4	5.2

	IT	UK	ME	NO	CZ	HU	PL	BE	UA	SE	FI	MK	AM	TR	AL	GE	MD	DE	AZ	MT	IS
High	9.5	8.0	7.8	6.4	6.4	6.3	6.1	5.7	4.9	4.8	4.0	1.04	0.5	-0.2	-0.6	-2.9	-4.9	-6.8	-9.1	:	:
Medium	14.1	8.3	2.5	11.1	19.0	8.9	10.9	2.7	1.2	7.9	3.7	-2.27	1.5	-1.6	5.7	-0.4	1.3	-5.2	1.4	2.0	13.1
Low	15.0	6.9	5.5	2.9	3.0	5.9	10.8	3.4	:	6.2	6.0	-3.45	-1.0	-0.2	3.4	-0.8	1.7	-3.3	-5.8	12.0	16.8

Notes:

Data are not reliable and not publishable in the case of high educational attainment for Iceland and Malta.

Data are not reliable in the case of high educational attainment for Bulgaria, Estonia, Croatia, Lithuania, Luxembourg and Austria; in the case of medium educational attainment for Lithuania and Malta, and in the case of low educational attainment for Croatia, Lithuania and Slovenia.

Data are sorted by the growth rate of unemployment of the highly educated. The median value (10.4%) refers to the annual growth rate of unemployment of the highly educated.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries

However, the inverse relationship between education and unemployment does not hold true all around the EHEA. In fact, in one third of the countries with available data, higher education graduates do not have the most secure position in the labour market. Two groups of countries can be distinguished among them.

First, in "The former Yugoslav Republic of Macedonia", Georgia, Albania, Armenia, Turkey, and Moldova, higher education graduates are actually in the worst position in the labour market: they face higher unemployment ratios than their peers with lower levels of education. In four of these countries (Georgia, Albania, Turkey and Moldova), young people with the lowest levels of education are the least likely to be unemployed; thus, higher levels of education go together with higher levels of unemployment. Among these countries there are systems with relatively low overall unemployment levels and a low level of educational inequality (e.g. Moldova), and systems with relatively high levels of unemployment combined with a high level of inequality in favour of the low-qualified.

Yet, in these countries, though higher education graduates face relatively high labour market insecurity, their position *has not actually worsened since 2008*. Looking at changes over time (Figure 6.15) reveals that in Georgia, Albania, Turkey and Moldova, unemployment ratios of the highly educated decreased since 2008, and the yearly increase has not been substantial in "The former Yugoslav Republic of Macedonia" and Armenia either. This suggests that in these countries, both the higher education sector and labour market demand is expanding, and the current picture might only be a transition phase. This is all the more likely to be the case given that in all these countries, with the exception of Georgia, higher education attainment levels are among the lowest in the EHEA (see Figure 6.1). As will be shown below, in this context – and also given the political-economic history many of these countries share – most countries in this group tend to have more centralised policy approaches towards enhancing graduates' employability (e.g. through enrolment quotas, compulsory work placements or university rankings).

A second group of exceptions contains Greece, Bosnia and Herzegovina, Serbia, Croatia, Cyprus, Portugal and Romania. In these countries, higher education graduates face higher unemployment ratios than young people with medium levels of education, and in some cases even have the worst position in the labour market in terms of employment prospects (in Bosnia and Herzegovina, Serbia and Romania). Thus, for this group it is also true that getting a higher education degree does not lead to a more secure labour market position. However, in contrast to the first group, the unemployment ratio of the highly educated has *increased* quite considerably in these countries since 2008, thus since the beginning of the economic crisis. This resulted in the relatively less secure labour market position of higher education graduates in comparison to those with medium (and sometimes even with low) educational attainment. In other words, these are the countries where a higher education degree could not provide a safeguard for young people against the impacts of the crisis.

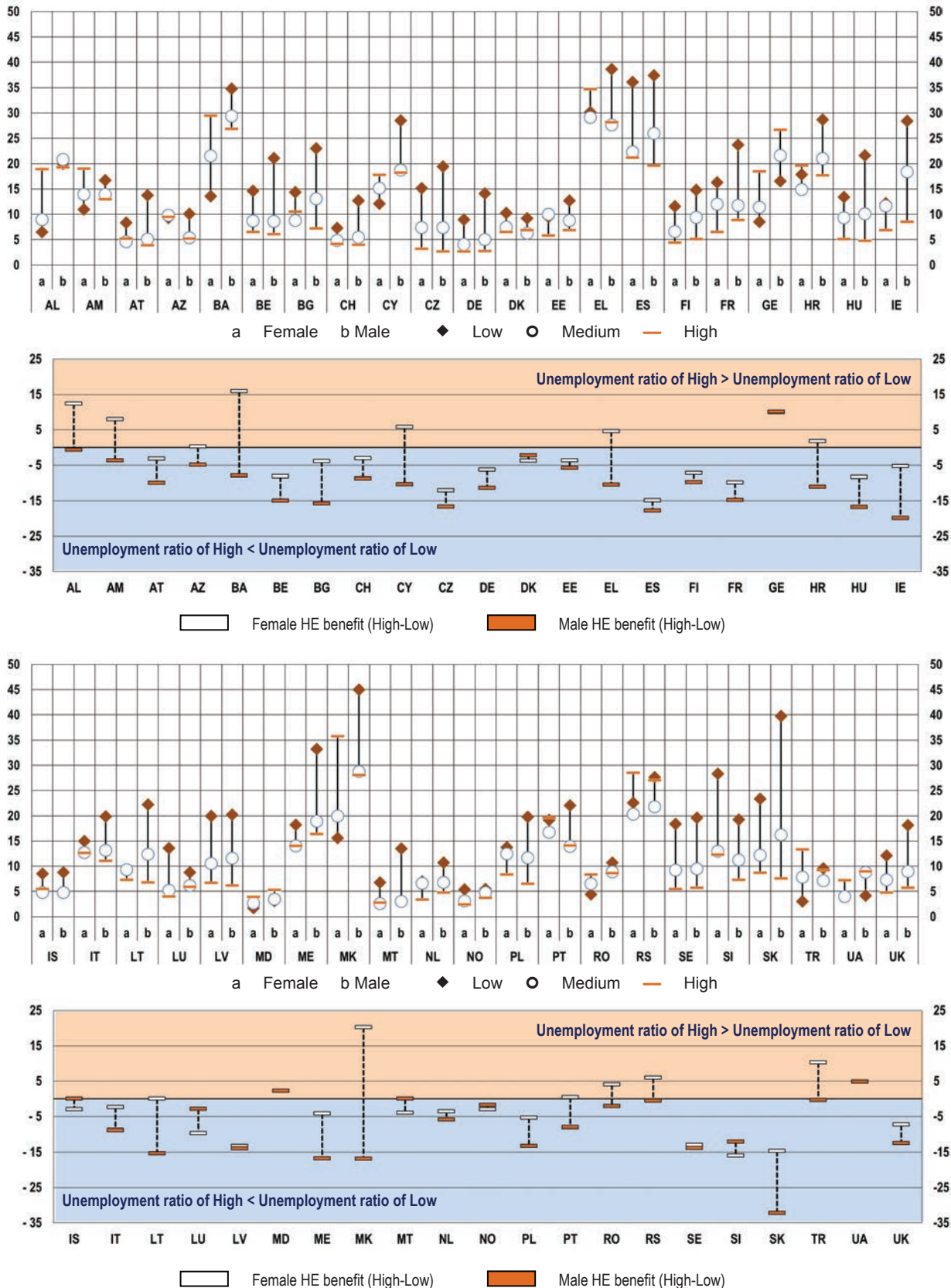
In fact, unemployment gaps between the high and the medium educated are narrowing all around the EHEA. Young tertiary education graduates have been the hardest hit by the economic crisis in comparison to their peers with medium and low educational attainment (see Figure 6.15). Between 2008 and 2013, the unemployment ratio of highly educated young people grew by more than 10.4 % yearly in half of the EHEA countries with available data, with the highest growth rates registered in Cyprus (36.2 %) and Greece and Spain (21.9 %). In comparison to those with medium level qualifications, the situation of tertiary education graduates worsened the most in Bosnia and Herzegovina, Romania and Montenegro (see also above).

Besides the countries mentioned above in the first group of exceptions, the labour market position of the highly educated has also improved in Germany since 2008. The country succeeded to further

reduce its initially very low level of unemployment, with a substantial decrease among the highly qualified, amounting to an annual growth rate of almost -7 %.

In addition to general trends, looking at gender differences in unemployment ratios also reveals important changes in the labour market (Figure 6.16).

Figure 6.16: Unemployment ratio of people aged 20-34 by educational attainment level and by sex (%), 2013



Notes:

The unemployment ratio is calculated as the share of the unemployed at the total population of a given educational attainment level and age group. Data are based on small sample size in most medium and small countries.

"Female (resp. male) HE benefit" is the difference between the unemployment ratio of women (resp. men) having completed tertiary education and the unemployment ratio of women (resp. men) having completed at most lower secondary education.

Cyprus, Estonia, Croatia and Slovenia: women (Low): Unreliable.

Luxembourg, Norway: women (Low and High): Unreliable.

Malta: Women (Medium and High): unreliable.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

In general, obtaining a higher level qualification lowers the probability of becoming unemployed for both women and men. However, the gap between the unemployment ratios of young people with high and low educational attainment is different for women and men. When looking at the EHEA region as a whole for the year 2013, while the unemployment ratios of young women and men were nearly identical among the highly educated, the difference is pronounced in the case of young people with low educational attainment. As Figure 6.16 also depicts, unlike observed in the 2012 Bologna Process Implementation Report (European Commission/EACEA/Eurydice, Eurostat and Eurostudent, 2012), in almost all countries in the EHEA, men with low educational attainment have higher unemployment ratios than their female counterparts.

Two important conclusions can be drawn on this basis. First, education (still) reduces the gender gap in unemployment. Second, in contrast to pre-crisis years, obtaining a higher level qualification seems to improve men's employment prospects more than those of women. In fact, when looking at the gender gap in unemployment for the low and the highly educated, unemployment patterns are reversed in around half of the EHEA countries with available data (the male unemployment ratio is higher than the female one among the low skilled, but lower for the high skilled). In addition, in all but three EHEA countries (Georgia, Ukraine and Moldova), young males with higher education attainment have a lower unemployment ratio than young males with the lowest level of education. The pattern is not so clear for women.

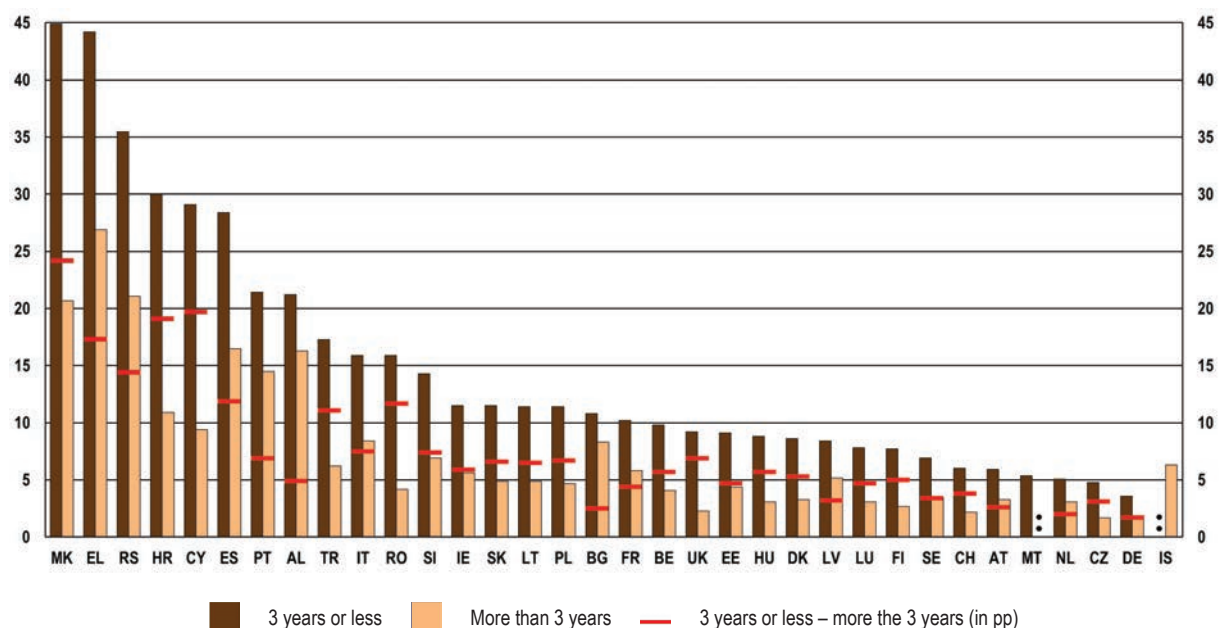
This illustrates well the impact of the crisis and how women and men have been differently affected. Labour markets are highly segmented across the EHEA: women and men – especially with lower levels of education – tend to be employed in different sectors. The economic crisis hit male-dominated sectors such as manufacturing and construction faster and more severely, so the male unemployment ratio increased faster (European Commission, 2013a).

Certainly, gender patterns are not the same across the EHEA. In several countries, there are relatively large differences between the unemployment ratios of women and men even among the highly educated. For example in Georgia and the Netherlands, highly educated young women are less likely to become unemployed than highly educated young men. In contrast, in Azerbaijan, Armenia and Turkey, highly educated young women have clearly worse employment prospects than their male peers.

It is also revealing to look more closely at differences among young people with high educational attainment. The transition from education into employment is a crucial stage in the life course of young people, which happens under conditions of declining employment opportunities and uncertainty. Poor early labour market experiences often have negative consequences for the whole professional career.

Figure 6.17 shows unemployment ratios of young tertiary education graduates by the number of years since graduation. The figure differentiates between young people who graduated three years or less before data collection (recent graduates), and those whose graduation was more than three years before data collection (experienced graduates). This indicator captures the labour market entry prospects of recent graduates in comparison to their more experienced peers.

Figure 6.17: Unemployment ratio of tertiary education graduates aged 20-34, by the number of years since graduation (%), 2013



	MK	EL	RS	HR	CY	ES	PT	AL	TR	IT	RO	SI	IE	SK	LT	PL	BG
3 years or less	44.9	44.2	35.5	30	29.1	28.4	21.4	21.2	17.3	15.9	15.9	14.3	11.5	11.5	11.4	11.4	10.8
More than 3 years	20.7	26.9	21.1	10.9	9.4	16.5	14.5	16.3	6.2	8.4	4.2	6.9	5.6	4.9	4.9	4.7	8.3
	FR	BE	UK	EE	HU	DK	LV	LU	FI	SE	CH	AT	MT	NL	CZ	DE	IS
3 years or less	10.2	9.8	9.2	9.1	8.8	8.6	8.4	7.8	7.7	6.9	6.0	5.9	5.4	5.1	4.8	3.6	:
More than 3 years	5.8	4.1	2.3	4.4	3.1	3.3	5.2	3.1	2.7	3.5	2.2	3.3	:	3.1	1.7	1.9	6.3

Notes:

Data are based on small sample size in most medium and small countries. The category '3 years or less from graduation' excludes the first year after graduation.

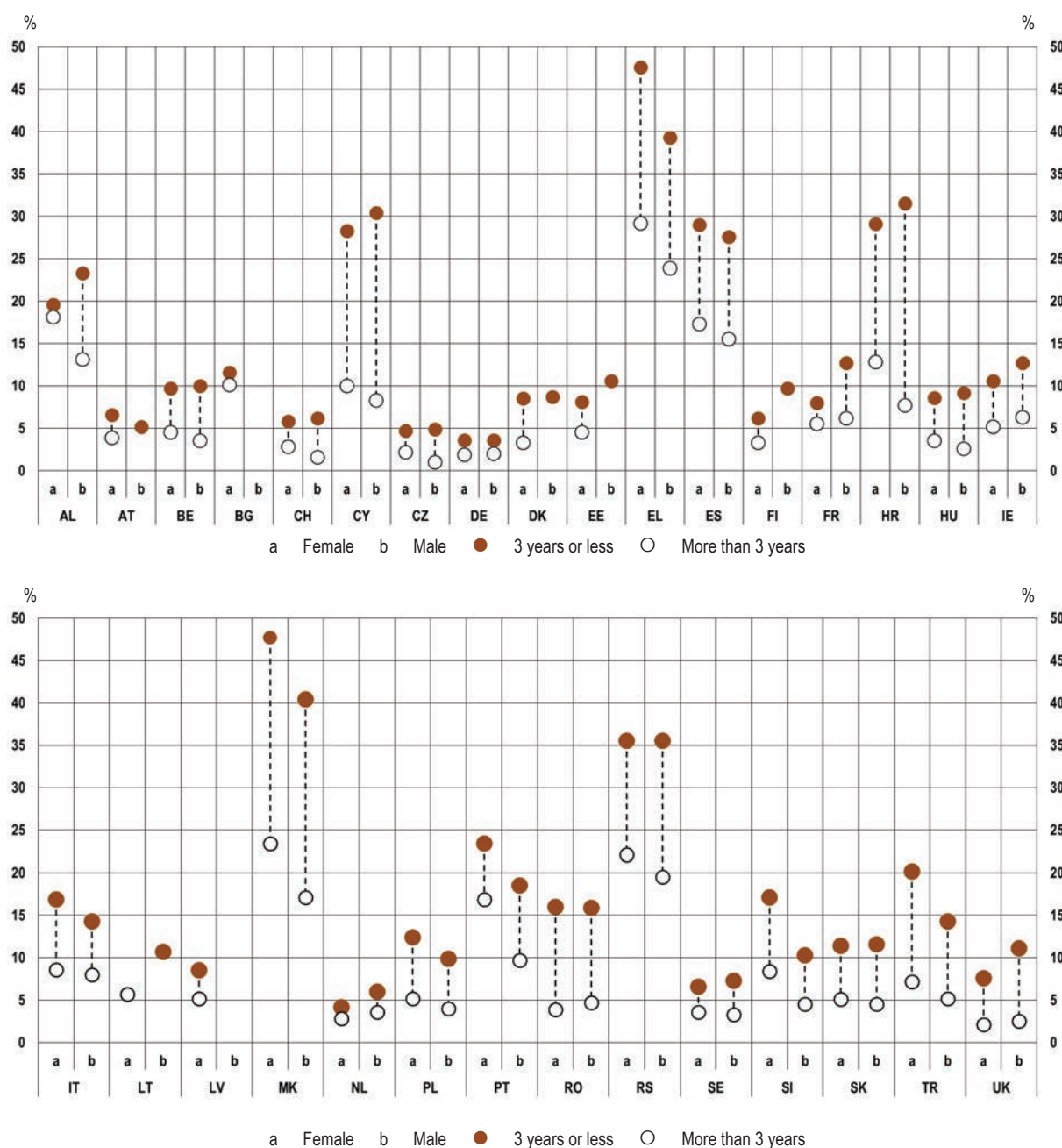
Data are sorted by the unemployment ratio of recent graduates. The median value (10.8%) refers to the unemployment ratio of recent graduates.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

As Figure 6.17 depicts, the unemployment ratio of recent graduates is considerably higher than that of more experienced young people in all EHEA countries with available data. The unemployment ratio of graduates with less than three years of (potential) work experience is more than 10.8 % in half of the countries covered, which is more than double the median ratio of more experienced graduates (4.9 %). Countries with the largest gaps between recent and experienced graduates are the United Kingdom (9.2 % vs. 2.3 %), Romania (15.9 % vs. 4.2 %) and Cyprus (29.1 % vs. 9.4 %). Countries where recent graduates are the least disadvantaged in comparison to more experienced graduates are Albania (21.2 % vs. 16.3 %) and Portugal (21.4 % vs. 14.5 %). However, the gap is smaller in these countries not because the unemployment ratio of recent graduates is lower, but because the unemployment ratio of experienced young people is also relatively high.

As was shown above, the labour market situation of highly educated women and men is relatively similar. This statement remains true when looking at differences between recent and more experienced graduates (see Figure 6.18).

Figure 6.18: Unemployment ratio of tertiary education graduates aged 20-34, by the number of years since graduation and by sex (%), 2013



Notes:

Data are based on small sample size in most medium and small countries.

The category "3 years and less since graduation" excludes the first year after graduation.

Data are sorted by the total unemployment ratio of recent graduates (graduated 3 years or less before data collection).

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

In the large majority of countries with available data, the gap between more and less experienced young people is slightly bigger in the case of men than for women. Regarding the gender gap among recent graduates, among the countries with available and reliable data it exceeds 5 percentage points in three countries, in each case to the disadvantage of women: Greece (47.6 % of women and 39.3 % of men), "The former Yugoslav Republic of Macedonia" (47.7 % and 40.4 %) and Turkey (20.2 % and 14.3 %).

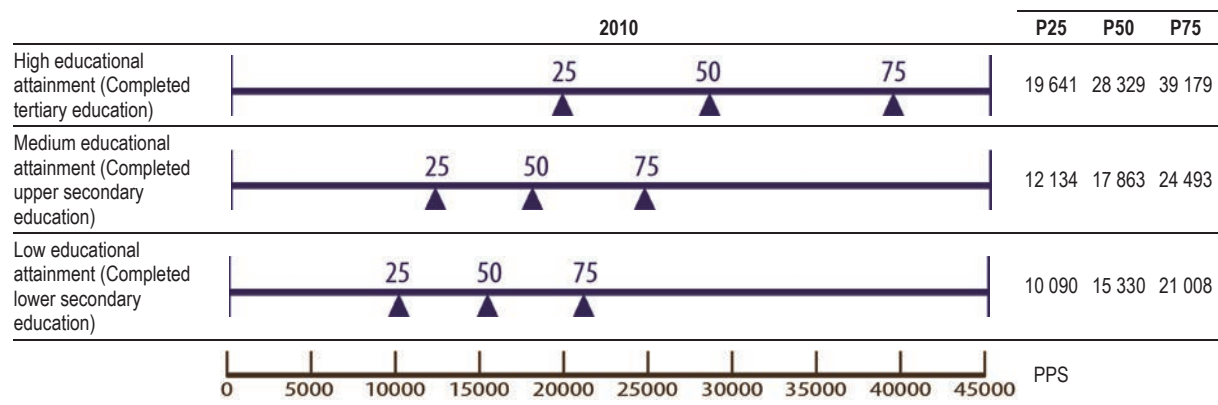
Overall, while young people with tertiary qualifications have better employment prospects than their peers with lower educational attainment, they were the most hit by the economic crisis, and their relative position worsened in comparison to those with medium level qualifications. In addition, recent graduates still face difficulties in the labour market. Thus, the transition to the labour market has been far from smooth for many graduates in the EHEA.

Income and educational attainment

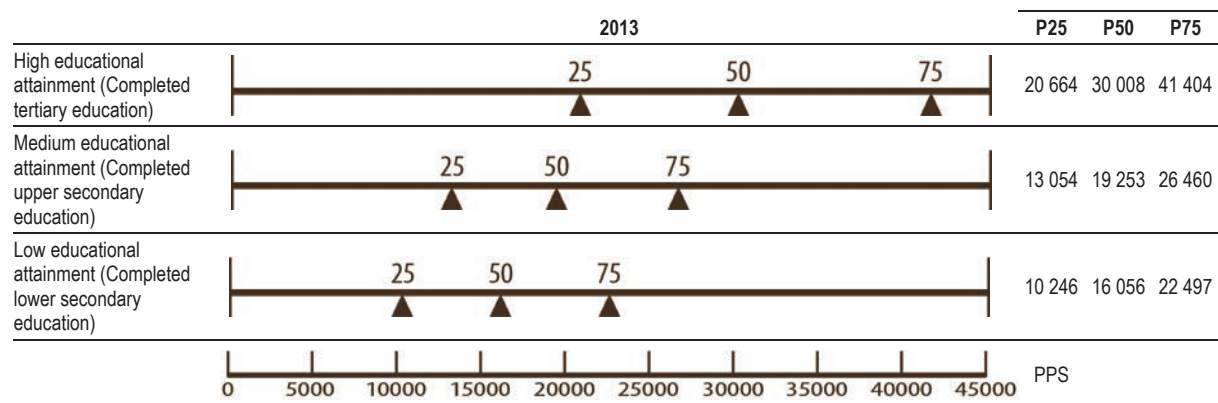
The expected income of persons with tertiary qualifications also forms part of graduates' labour market prospects. The assumption is that higher educational attainment – and thus higher levels of investment in education – should be compensated by better paid jobs after graduation.

The relative income advantage of employees with tertiary qualifications is depicted in Figures 6.19 and 6.20. Figure 6.19 shows the median as well as the lower and upper quartile of employee income by educational attainment in 2010 and 2013.

Figure 6.19: 25, 50 and 75 percentiles of annual gross income of employees by educational attainment, EU-28, in PPS EUR, 2010 and 2013



P25/P50/P75 = Percentile 25/50/75



Notes:

Calculation based on the variables 'Employee cash or near cash income' and 'Non-Cash employee income' which were added up to create the gross cash and non-cash employee personal income of individuals who were at least 6 months employed during the income reference period. For details, see the Glossary and methodological notes.

The age group covered is 16+.

Source: Eurostat, EU-SILC (Statistics on Income and Living conditions).

Income distributions confirm that the gross income of most tertiary qualified employees is higher than those of lower qualified employees. In 2013, the median income of employees with tertiary qualifications amounts to around 30 000 Euros in Purchasing Power Standard (PPS), whereas the median income was approximately PPS 19 000 for employees with upper secondary education and around PPS 16 000 for those with lower secondary education.

While there is much overlap in the income distributions of employees who attained lower and upper secondary educational attainment levels, the majority of employees with tertiary education tend to benefit considerably from obtaining this qualification level. Within each qualification level, the upper quartile (percentile 75) of the income distribution is about twice as high as the lower quartile (percentile 25). However, attaining a tertiary qualification does not inevitably translate into higher income levels. 25 % of employees who completed only lower secondary schooling earned more than 22 000 PPS (upper quartile) in 2013, whereas the quarter of the tertiary qualified at the lower end of the income distribution earned less than 21 000 PPS. These differences may be associated with individual preferences, heterogeneous skills among workers with the same qualification level, and qualification mismatch, i.e. the fact that not all tertiary qualified workers are in jobs that typically require a tertiary qualification (see next section).

Comparing income levels in 2010 and 2013 reveals that while the annual gross income increased in all categories in this period, in absolute terms, the income of the highly educated grew the most (see Figure 6.19). However, in relative terms, employees with upper secondary education gained the most in this period, which means that the income advantage of the highly educated decreased somewhat in comparison to those with upper secondary qualifications. Nonetheless, it is the annual gross income of employees with low qualifications that increased the least between 2010 and 2013, especially in the lower quartiles. In addition, growth rates were bigger in the upper quartiles for all qualifications, which signals that income inequalities slightly increased in this period.

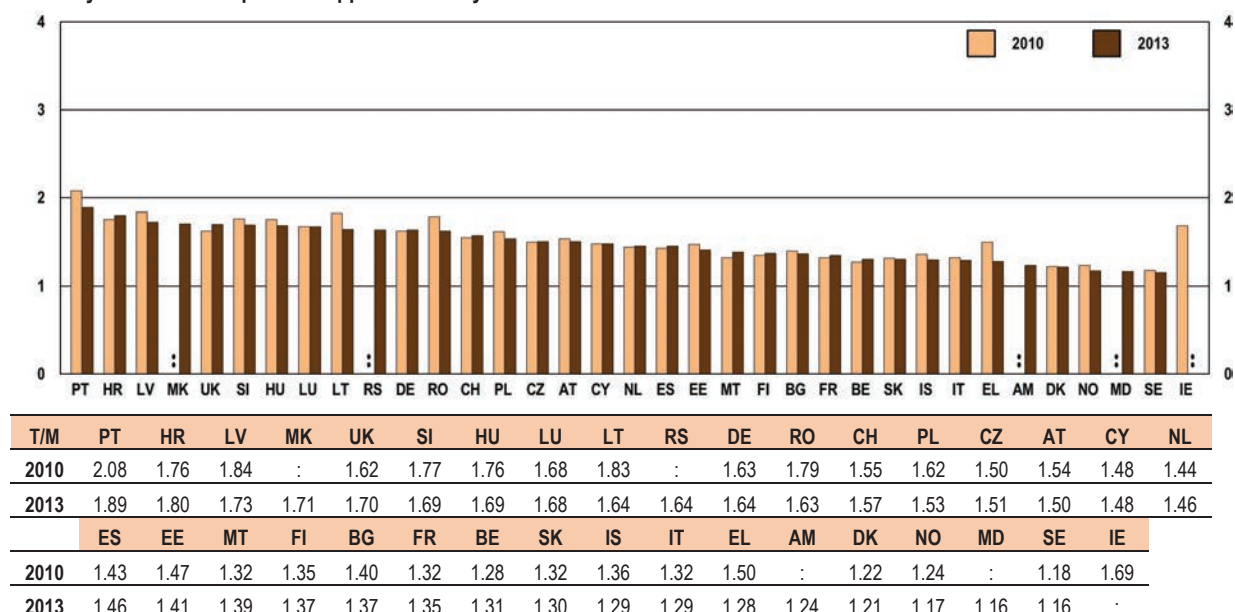
The ratio of the median annual gross income of employees with tertiary qualification to lower levels of education is depicted by country in Figure 6.20. In 2013, tertiary qualified employees in every country for which data are available had an income advantage. The ratio of tertiary qualification to completed upper secondary education ranges from 1.9 in Portugal – meaning that the median annual gross income of tertiary qualified employees is almost twice as high as the income of upper secondary qualified employees – and 1.8 in Croatia to 1.2 in Sweden, Moldova, Norway and Denmark.

The impact of completing tertiary education instead of only lower secondary schooling on the median annual gross income is more pronounced in several countries. The ratio exceeds 3 in Germany and 2.5 in Armenia, Switzerland, Luxembourg and Austria. In a number of other countries, the ratio is around two, indicating a high wage premium when gaining a tertiary degree. Again, the income inequality between the low and the highly educated is lowest in three of the Nordic countries, namely Sweden, Denmark and Finland.

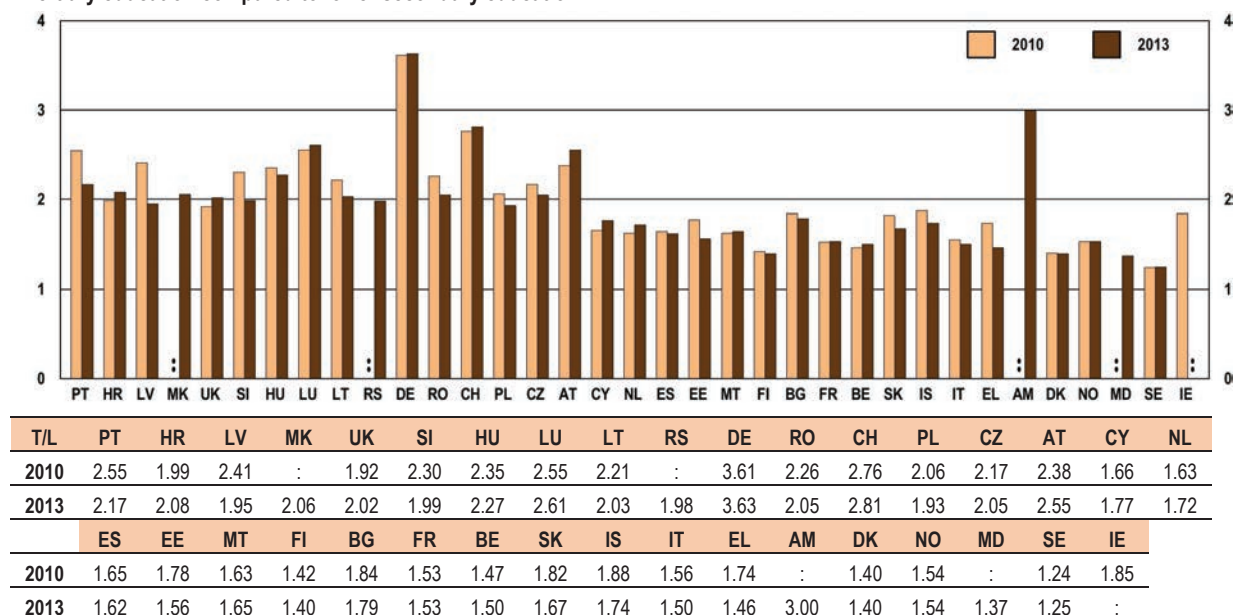
Regarding changes in the median gross annual income since 2010, though the relative ratios were rather stable, decreases in the income advantage of the highly educated (both compared to employees with upper and lower secondary education) can be observed in more countries than increases. Compared to employees with upper secondary qualifications, employees with tertiary education qualifications lost the most in Greece; while compared to those with lower secondary education, advantages of the highly qualified decreased the most in Greece, Latvia, Portugal and Slovenia (Figure 6.20).

Figure 6.20: Ratio of median annual gross income of employees with tertiary education to the median annual gross income of employees with lower levels of education, 2010 and 2013

Tertiary education compared to upper secondary education



Tertiary education compared to lower secondary education



Notes:

Calculation based on the variables 'Employee cash or near cash income' and 'Non-Cash employee income' which were added up to create the gross cash and non-cash employee personal income of individuals who were at least 6 months employed during the income reference period.

The age group covered is 16+.

Data are sorted by ratio between the median annual gross income of employees with tertiary education to the median annual income of employees with upper secondary education.

Source: Eurostat, EU-SILC (Statistics on Income and Living conditions).

Qualification mismatches

Another common indicator of the labour market prospects of graduates is vertical mismatch, which occurs when there is a discrepancy between graduates' level of education or skills and the level of education or skills required by their job (Cedefop 2010, p. 13). Such vertical mismatch can occur in terms of *qualifications* or *skills*, and conclusions can be very different depending on which one is being examined. For example, a recent analysis undertaken based on the Survey for Adult Skills (PIAAC) for a set of European Union member countries shows that the share of people who are both overqualified and overskilled is relatively low (around 15 % of the sample, see Flisi et al. 2014, p. 4.). A similar share of people was found to be overskilled but not overqualified, while twice as many were reported to be overqualified but not overskilled (Ibid.).

These scenarios suggest diverse forms of inefficiencies in how the education system responds to labour market needs. The relatively high proportion of overqualified but not overskilled people suggests that many stay too long in the education system while not receiving extra skills and competences. This can also indicate that tertiary education institutions were not able to provide graduates the skills necessary for a better labour market position. However, as was discussed above, factors influencing education mismatches – a sudden drop in labour market demand, labour market imperfections, discrimination, etc. – are not always in higher education institutions' control.

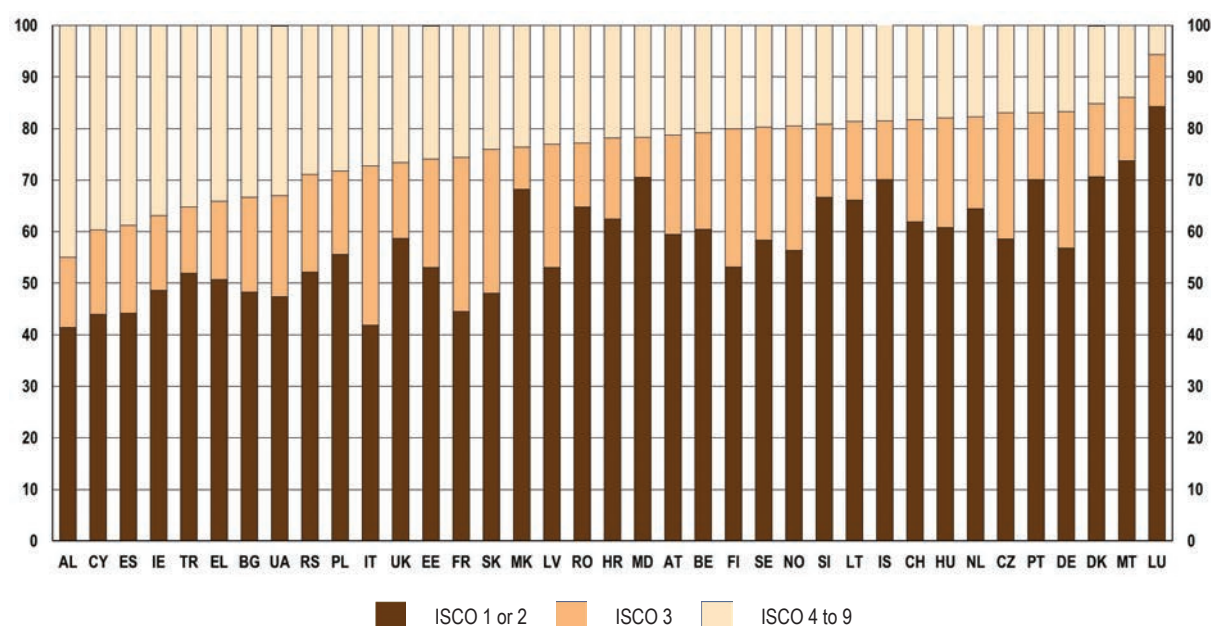
Qualification and skills mismatches can be measured based on several different indicators. In general, self-assessment is regarded as the most accurate measurement of vertical mismatch, particularly skills mismatch. However, comparative survey data is not available for the EHEA region ⁽⁵⁾. An alternative indicator assigns a fixed educational level to a given occupational category. While such indicator has many limitations (e.g. its rigidity or the need for detailed job-category lists which are not always feasible to compile), it can serve as a starting point for further analysis.

This sub-section looks at over-qualification rates defined as the percentage of young people with tertiary education occupying a post not traditionally regarded as necessitating a tertiary qualification (International Standard Classification of Occupations (ISCO) occupation level 4 to 9, including clerks, service workers, agricultural and fishery workers, craft and related trades workers, plant and machine operators or elementary occupations ⁽⁶⁾). Figure 6.21 shows the distribution of people aged 25-34 with tertiary education qualifications and employed in ISCO 1 or 2 (legislators, senior officials, managers and professionals), in ISCO 3 (technicians and associate professionals) and in ISCO 4 to 9.

⁽⁵⁾ The EUROGRADUATE feasibility study is currently exploring if and whether a sustainable study on Europe's higher education graduates could be established. The report is expected to be completed by October 2015. See more information at: <http://www.eurograduate.eu/>.

⁽⁶⁾ See the Glossary and methodological notes for more details.

Figure 6.21: Distribution of people with tertiary education (ISCED 5-6) aged 25-34 and employed in ISCO 1 or 2 (legislators, senior officials, managers and professionals), in ISCO 3 (technicians and associate professionals) and in ISCO 4-9 (%), 2013



	Md	AL	CY	ES	IE	TR	EL	BG	UA	RS	PL	IT	UK	EE	FR	SK	MK	LV	RO
ISCO 1 or 2	58.3	41.4	44.0	44.2	48.6	51.9	50.7	48.3	47.4	52.1	55.6	41.8	58.7	53	44.5	48.1	68.2	53.0	64.8
ISCO 3	17.0	13.6	16.3	17.0	14.5	12.9	15.2	18.4	19.6	19.0	16.1	30.9	14.7	21.1	29.9	27.9	8.2	24.0	12.4
ISCO 4 to 9	21.9	45.0	39.7	38.8	36.9	35.2	34.1	33.3	32.9	28.9	28.3	27.3	26.6	25.8	25.6	24	23.6	23.0	22.8
	HR	MD	AT	BE	FI	SE	NO	SI	LT	IS	CH	HU	NL	CZ	PT	DE	DK	MT	LU
ISCO 1 or 2	62.5	70.5	59.5	60.5	53.1	58.3	56.4	66.7	66.1	70.1	61.9	60.8	64.4	58.6	70.1	56.8	70.6	73.7	84.3
ISCO 3	15.7	7.8	19.2	18.7	26.9	22.0	24.1	14.1	15.3	11.4	19.8	21.3	17.9	24.4	13	26.5	14.2	12.3	10.0
ISCO 4 to 9	21.9	21.7	21.3	20.8	20	19.7	19.5	19.2	18.6	18.6	18.3	17.9	17.8	17.0	16.9	16.7	15.1	14.0	5.7

Notes:

ISCO 0 (armed forces) and ISCO missing excluded.

Data are sorted by the percentage of people working in ISCO 4 to 9.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

In 2013, the median over-qualification rate was 21.9 %. This means that in half of the countries, more than one fifth of young graduates were employed in occupations for which a lower qualification level should be sufficient. The countries with the highest over-qualification rates (above 30 %) were Albania (45 %), Cyprus (39.7 %), Spain (38.8%), Ireland (36.9 %), Turkey (35.2 %), Greece (34.1 %), Bulgaria (33.3 %) and Ukraine (32.9 %). In contrast, the countries with relatively low over-qualification rates (below 15 %) are Malta (14 %) and Luxembourg (5.7 %).

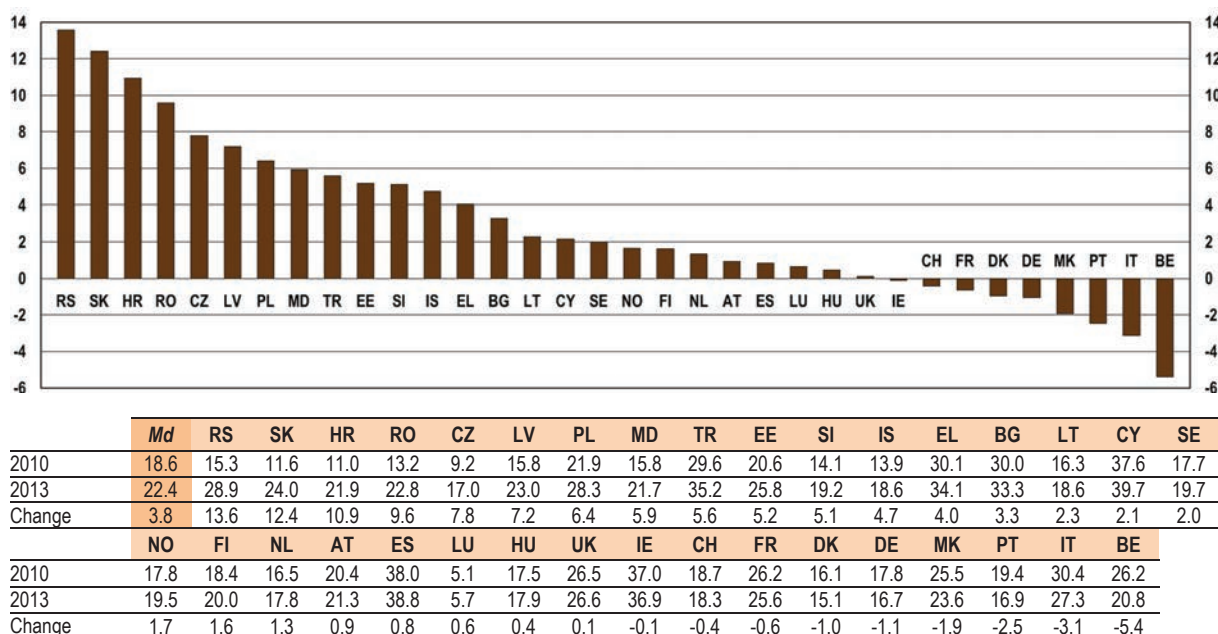
In comparison to 2010, there are more countries on this list with over-qualification rates above 30 % and fewer with over-qualification rates below 15 %. Comparing median values between 2010 and 2013 ⁽⁷⁾ also shows an increase of people with tertiary education who are overqualified for their job. This means that in general, the proportion of overqualified tertiary education graduates grew in EHEA countries since 2010. Thus, not only has the unemployment ratio of highly educated young people increased since the economic crisis, but also those who are in employment are now more likely to accept jobs for which they are overqualified. Countries with high over-qualification rates also tend to have relatively high unemployment ratios for the highly educated (see Figure 6.14). This implies that

⁽⁷⁾ For the comparison, Albania, Malta and Ukraine were excluded from the 2013 sample (no data were available for these countries in 2010).

when young graduates face difficulties in finding jobs matching their qualifications, they are more likely to accept jobs requiring lower levels of qualifications.

Figure 6.22 illustrates the change in the share of overqualified young graduates between 2010 and 2013 by country. As the figure shows, the share of overqualified young graduates grew considerably (by more than 10 percentage points) in Serbia, Slovakia and Croatia. In contrast, the largest decrease in the share of overqualified graduates took place in Belgium.

Figure 6.22: Change in percentage points of the share of people with tertiary education (ISCED 5-6) aged 25-34 and employed in ISCO 4-9, 2010 to 2013



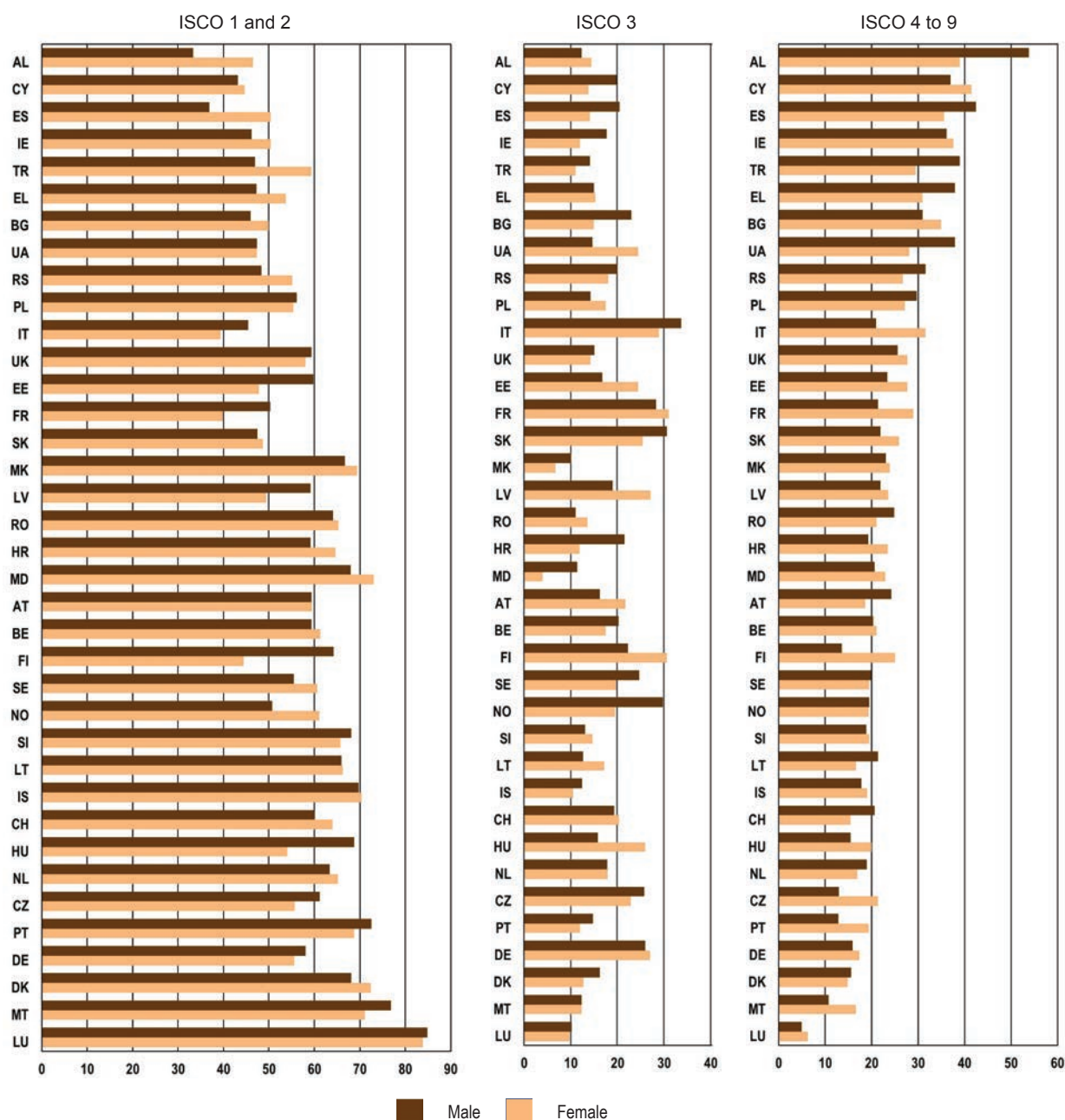
Notes:

Data are sorted by the change in percentage points between 2010 and 2013.

Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

Differences between the over-qualification rates of female and male graduates are relatively small, though women are more likely to get jobs under the level of their qualifications (see Figure 6.23). However, countries differ a lot in this regard. The biggest differences between female and male over-qualification rates are on the one hand in Albania, Ukraine, Switzerland, Turkey and Austria (with higher over-qualification rates for men) and on the other hand in Finland, the Czech Republic, Portugal and Italy (with higher over-qualification rates for women). It is interesting to note, however, that there are more countries with higher over-qualification rates for women, and the differences tend to be bigger between the sexes in these cases than in countries with higher over-qualification rates for men.

Figure 6.23: Distribution of people with tertiary education (ISCED 5-6) aged 25-34 and employed in ISCO 1 or 2 (legislators, senior officials, managers and professionals), in ISCO 3 (technicians and associate professionals) and in ISCO 4-9, by sex (%), 2013



Notes:

ISCO 0 (armed forces) and ISCO missing excluded.

Data are not reliable for Croatia (ISCO 3, male and female, ISCO 4 to 9, male), Luxembourg and Malta (ISCO 4 to 9, male), and Albania (ISCO 3, male and female).

Data are sorted by the total percentage of people not working in ISCO 1, 2 or 3.

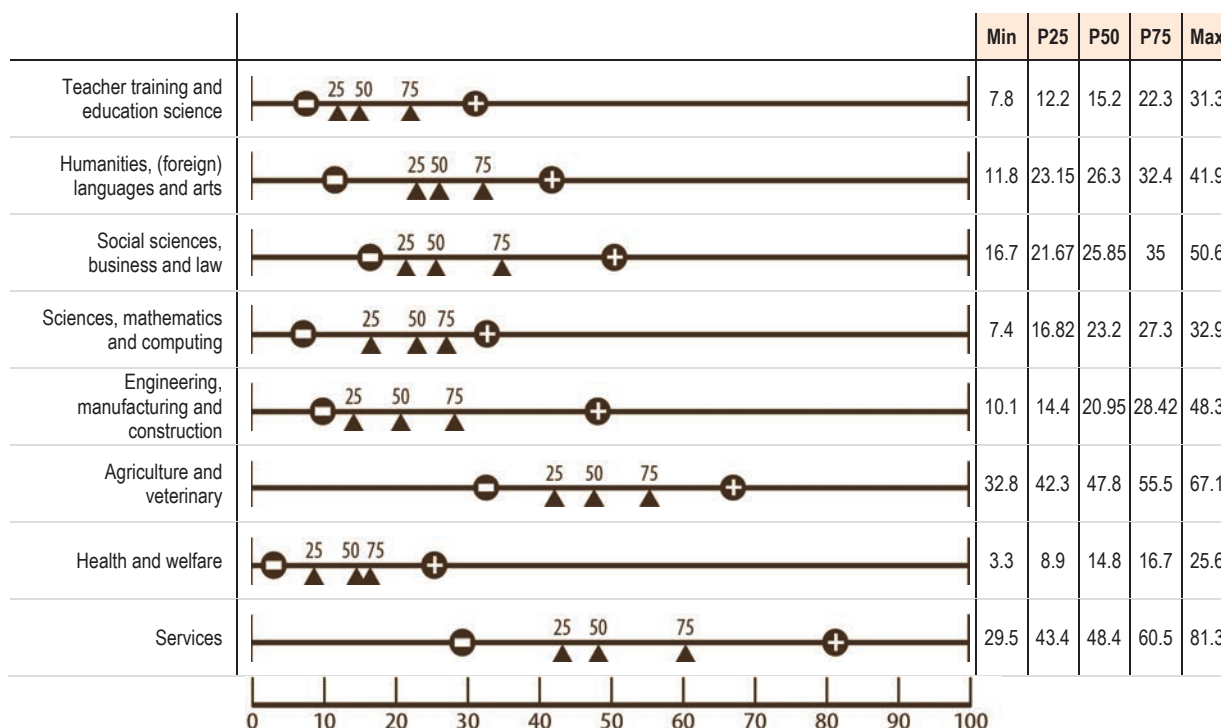
Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

Over-qualification rates might also be very different for young people graduating in different study fields. Figure 6.24 depicts the percentage of young graduates who are vertically mismatched by field of study. Similarly to what was found in the 2012 Bologna Implementation Report (European Commission/EACEA/Eurydice, Eurostat and Eurostudent, 2012), data shows that young people with a qualification in services⁽⁸⁾ and in agriculture and veterinary⁽⁹⁾ are the most likely to take up jobs

⁽⁸⁾ "Services" include a wide range of occupations from restaurant and tourism to defence and military services (for more details, see

under their qualification level: in services, more than 48.4 % of graduates are overqualified in this field in half of the countries covered, while the median rate is 47.8 % in agriculture and veterinary. However, differences between countries are substantial: over-qualification rates in services range from 29.5 % (Italy) to 81.3 % (Cyprus), and in agriculture and veterinary from 32.8 % (Turkey) to 67.1 % (Switzerland).

Figure 6.24: Percentage of people aged 25-34 with tertiary education (ISCED 5-6) who are vertically mismatched (in ISCO 4-9) by field of study, 2013



Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

Again similarly to the findings of the previous report, study fields with the lowest over-qualification rates are health and welfare (median: 14.8 %) and teacher training and education science (median: 15.2 %). However, countries again show some variation. Over-qualification rates in health and welfare range from 3.3 % (Turkey) to 25.6 % (Ireland); in teacher training and education science from 7.8 % (Germany) to 31.3 % (Cyprus). However, it has to be stressed again that data are not available for all countries in all study fields. In addition, limitations of the figures stemming from potential discrepancies between qualifications and the skill levels as well as from the reliance on the ISCO classification have to be kept in mind.

Thus, while in general the labour market position of higher education graduates weakened since the beginning of the crisis, countries still need to respond to diverse challenges. The next section presents the main directions of employability policies in the EHEA.

6.2.2. Policies for enhancing graduates' employability

There is a broad range of policies influencing the employability of graduates. As described by the policy recommendations of the European Students' Union (ESU), most areas discussed in this report have relevance for the labour market prospects of higher education graduates, including Bologna tools

the ISCED classification for fields of education, e.g. Andersson and Olsson, 1999).

(9) Since sample size in agriculture and veterinary is small in many countries, this result is based on 10 systems only and has to be interpreted with caution. For the country coverage, see the Glossary and methodological note.

such as qualifications frameworks, learning outcomes, the system of ECTS, Diploma Supplements or the recognition of prior learning (ESU 2014, pp. 51-54).

When looking at policies with the primary aim of improving graduates' employability prospects, two main policy perspectives can be distinguished. The first focuses on the needs of the labour market – the demand-side – to which higher education institutions need to respond. The second emphasises employable graduates and thus implies a more supply-side perspective: what higher education institutions need to achieve in terms of output, e.g. providing graduates with a set of relevant skills and competences. In this regard, most discussions centre on the role of higher education institutions and how they should function in 21st century knowledge societies. The role of educational authorities in this context is to facilitate the transformation of their higher education sector. Therefore, since this report focuses on national policy approaches, it can only present a limited picture on the on-going transformations.

Nevertheless, after presenting a general picture on the place of employability in higher education steering documents, this section shows examples of both demand-side and supply-side policy approaches. Regarding the objective of responding to labour market needs, an important question is where higher education institutions can look for relevant labour market information. The two most widespread possibilities are labour market and skills forecasting on the one hand, and involving labour market representatives (i.e. employers) in higher education governance on the other. Concerning graduates' adequate skills, one prevalent way to ensure that graduates gain the necessary competences is to include work placements in higher education programmes. In addition, career guidance services can equip students with important competences for their job search. Finally, this section also looks at how the employability of graduates is monitored and evaluated in EHEA countries and whether there are any incentives given to higher education institutions linked to their performance.

Policy framework

The objective of meeting labour market needs and enhancing graduates' employability is mentioned in higher education steering documents in the vast majority of EHEA countries, the exceptions being Andorra, Cyprus, Iceland and Slovakia. In several countries (e.g. in Austria, France, Georgia, or Greece), improving the employability of graduates forms part of higher education institutions' mission. Others require higher education institutions to prove in the accreditation process that their programmes respond to labour market needs. Many countries encourage higher education institutions to include labour market information (based on forecasts or through the involvement of employers) when defining learning outcomes, developing or changing the content of programmes, or even managing the number of students in different study fields. Similarly, many emphasise the importance of specific measures such as making sure that students can get an easy access to work placements or counselling and career guidance services.

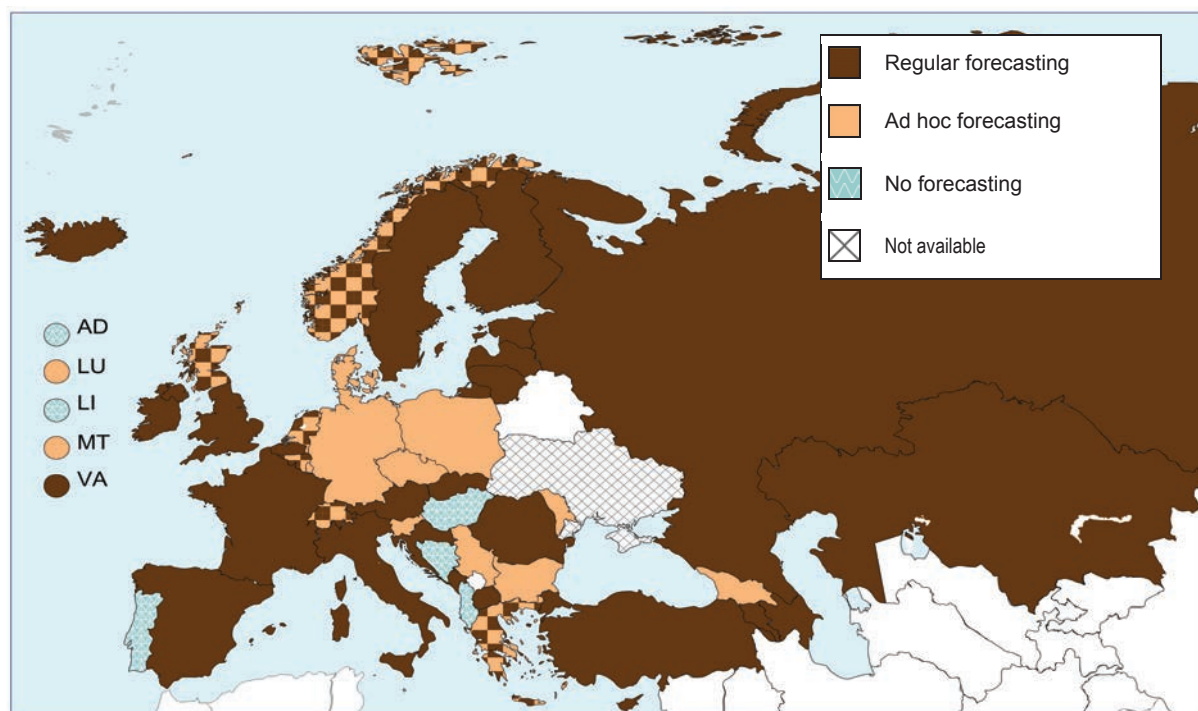
However, almost all EHEA countries aim to enhance the employability of graduates in general, without specific reference to underrepresented groups. Only in a few cases (e.g. in Estonia or Hungary) do higher education steering documents mention particular underrepresented groups in the context of employability. This shows that while more countries focus on facilitating access to higher education for people from underrepresented groups or even on providing measures to make sure that they complete their studies, the social dimension of graduates' employability is not prominent in the higher education policy agenda. Nevertheless, it also has to be noted that while steering documents might not refer to underrepresented groups, concrete policy measures can still target specific groups of students. For example, as will be shown below, targeted career guidance services exist in several EHEA countries.

Labour-market and skills forecasting as an information source

In order to be able to respond to labour market demand, governments and higher education institutions need information on labour market trends. Despite its limitations (see European Commission/EACEA/Eurydice, 2014), labour market forecasting is a common way to anticipate labour market needs in terms of skills demand and supply. On the one hand, labour market forecasting can inform policy planning, for example the planning and designing of study programmes, the fixing of the number of state funded places, or the allocation of public funding. On the other hand, guidance and information services can use labour market information to guide (potential) students in orienting themselves towards more 'demanded' fields of study. Labour market forecasting is usually conducted by occupation and qualification levels.

In the majority of EHEA countries, labour market and skills forecasting is undertaken regularly at national level (Figure 6.25). Such forecasting exercises are conducted on an ad hoc basis in 17 education systems, sometimes in addition to the regular forecast in place. There is no labour market forecasting in Albania, Andorra, Bosnia and Herzegovina, Hungary, Liechtenstein and Portugal. In about one third of EHEA countries, regular labour market and skills forecasting is also undertaken at regional level, in addition to the national one.

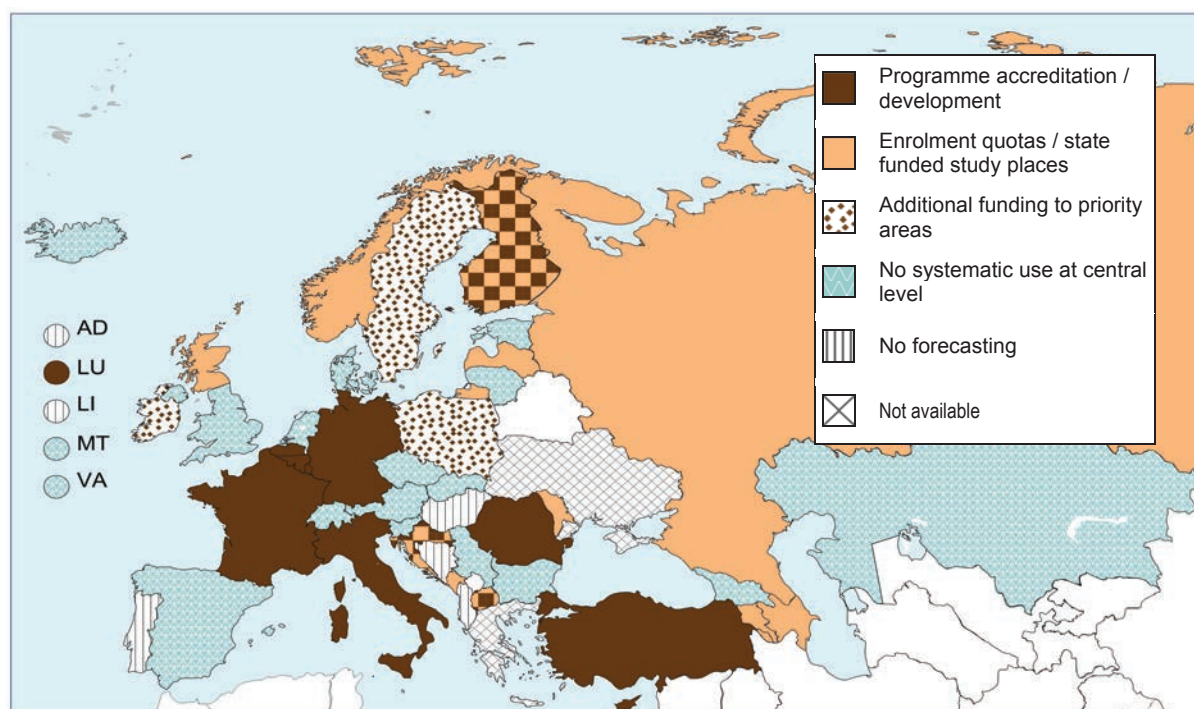
Figure 6.25: Labour-market and skills forecasting at national level, 2013/14



Source: BFUG questionnaire

Most countries conducting labour market forecasts make efforts to take their results into account in higher education planning at central level (Figure 6.26). In 11 countries, labour market information is used to determine enrolment quotas or state-funded study places in all or certain higher education study fields. In 11 others, such forecasts are taken into account when deciding on the accreditation of new study programmes and/or to adapt the content of existing programmes to labour market needs (in Germany, this is the competence of the *Länder*). Countries also reported on how labour market forecasts are used to identify priority areas for additional funding (Ireland, Poland and Sweden). Nevertheless, while central authorities do not always use labour market information systematically, higher education institutions can still rely on them in programme planning or career guidance provision.

Figure 6.26: Using labour-market and skills forecasting in central planning, 2013/14



Source: BFUG questionnaire

Cooperation between employers and higher education institutions

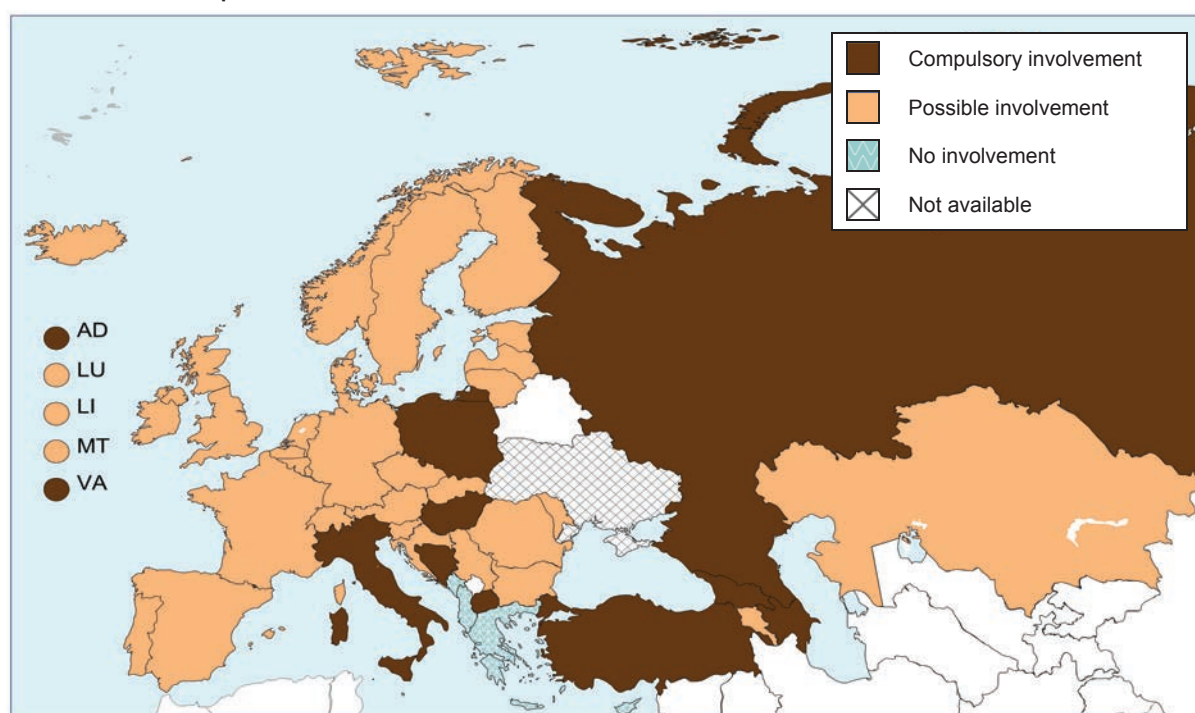
The Bucharest Communiqué regards cooperation between employers and higher education institutions as an important means to enhance the employability of higher education graduates. Indeed, consulting or involving employers, employers' organisations and business representatives in the various steps of developing and evaluating higher education study programmes is a direct and more decentralised mechanism through which labour market information can be included in higher education. Employers and business representatives are aware of the skills graduates need when entering the labour market ⁽¹⁰⁾, and higher education institutions can use this knowledge when designing degree programmes.

Looking at the most important areas in which employers can be involved in higher education (curriculum development and participation in higher education institutions' decision-making bodies), it appears that employers do participate in higher education planning and governance across the EHEA. A common way to include employers is through quality assurance: in many countries, employers are required to participate in the accreditation and evaluation of higher education programmes (see Figure 3.15).

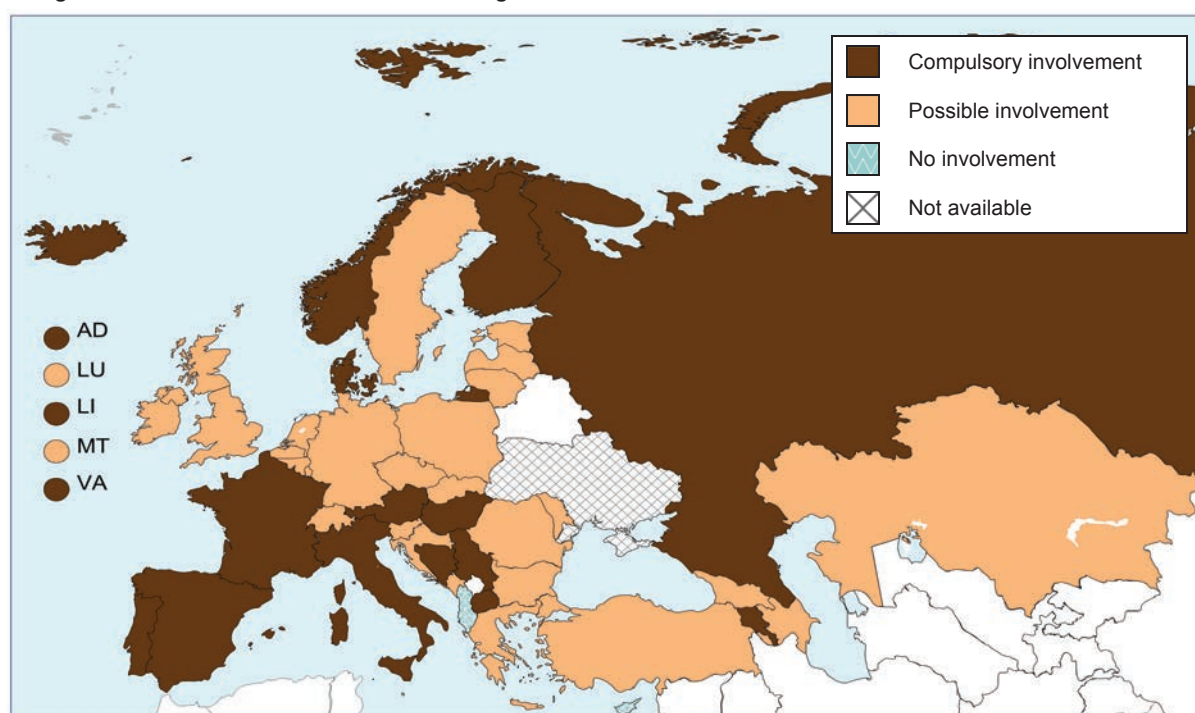
⁽¹⁰⁾ On the relative importance of professional and various generic skills for employers, see for example Humburg, van der Velden and Verhagen, 2013.

Figure 6.27: Involvement of employers in higher education planning and management, 2013/14

A. Curriculum development



B. Higher education institutions' decision-making bodies



Source: BFUG questionnaire

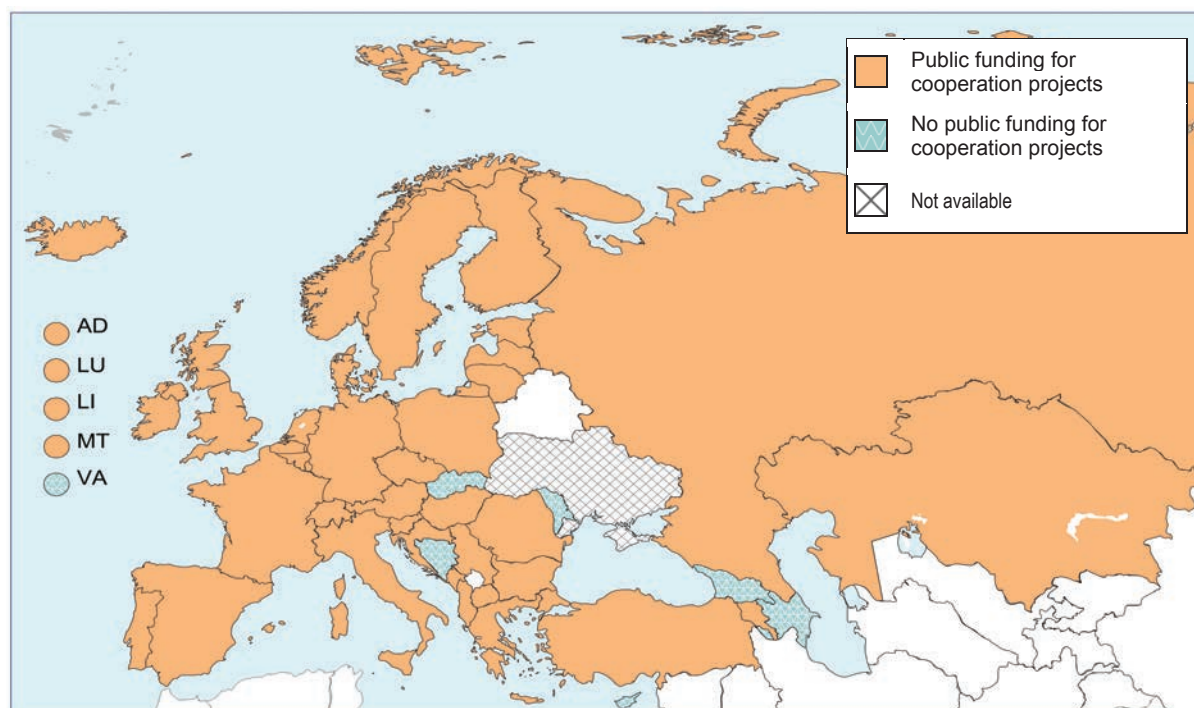
However, the extent of employers' participation differs across the EHEA. Regarding curriculum development, 11 countries make it compulsory for employers to participate in the design or revision of curricula (see Figure 6.27.A). In addition, in some countries, employers have to be involved in curriculum development in the case of certain types of higher education institutions (for example in the case of Universities of Applied Sciences (*Fachhochschule*) in Austria or in the Netherlands). Nevertheless, even in countries where their participation is not mandatory, employers' involvement can be widespread. Some countries have also created special degree programmes, designed principally to meet employers' demands, where curricula are developed with close cooperation with

employers. Examples include the professional diploma in Albania, the professional bachelor degree (*licence professionnelle*) in France, or foundation degrees in the United Kingdom (England, Wales and Northern Ireland). In Ireland, in the framework of the ICT Skills Conversion programme, employers are involved in the development and delivery of specific programmes to address skills gaps in the economy.

Eighteen countries make it compulsory for higher education institutions to include employers in higher education institutions' governing bodies (Figure 6.27.B). Furthermore, in some countries, employers are also involved in various national (e.g. in Croatia, France, Germany, Poland, Slovenia, Sweden or the United Kingdom (Scotland)), regional (e.g. in Italy) or sectoral (e.g. in Montenegro) decision-making bodies.

Employers' participation can be facilitated by university-business cooperation projects, where higher education institutions and business organisations are developing innovative projects together. Through financial means, governments can provide incentives to one or both parties to participate in such projects. As Figure 6.28 shows, university-business cooperation projects receive some form of public funding in the large majority of EHEA countries. A number of countries (e.g. Croatia, Denmark, "The former Yugoslav Republic of Macedonia", Iceland, and Norway) established specific innovation funds from which university-business cooperation projects are funded directly. Alternatively, specialised government agencies can receive the task of financing such projects (e.g. in Belgium (Flemish Community), Sweden and Switzerland). In Sweden, the government also finances Innovation Offices at some universities. Ireland and Liechtenstein issue innovation vouchers to facilitate collaboration between enterprises and higher education institutions.

Figure 6.28: Public funding for university-business cooperation projects, 2013/14



Source: BFUG questionnaire

Practical training and work placements

Public funds are also often allocated to finance work placements for students. Practical training is regarded as a key element in enhancing graduates' employability, especially when it comes to students from underrepresented groups. Through such practical training and work placements, students have the possibility of acquiring the skills demanded by employers.

Unfortunately, data on students' participation rates in practical training are not available in many EHEA countries. Countries reporting a high percentage of participation rates (over 70 %) for both cycles are Armenia, Azerbaijan, Georgia, Kazakhstan, Moldova and Russia. In the first cycle, participation is reported to be high in Andorra, Latvia and Romania. Very low participation rates (under 10 %) are reported from Cyprus, Iceland and Montenegro.

In the European Union (EU), Directive 2005/36/EC on the recognition of professional qualifications ⁽¹¹⁾ regulates embedding practical training into certain, professionally oriented study programmes (e.g. for medical or pharmaceutical studies). Many non-EU member countries also apply similar regulations in some, more practice-oriented study fields. However, beyond these regulated professions, higher education institutions are mostly free to decide whether they include such structured work experiences in their study programmes.

Nevertheless, some countries make the inclusion of work placements compulsory for certain types of institutions or programmes. For example, in Denmark, practical training is required at Academies of Professional Higher Education and University Colleges for both first and second cycle students. This is the case in Austria for Universities of Applied Sciences (*Fachhochschule*) and in Estonia for professional higher education institutions. Similarly, in Finland, all first cycle Polytechnic degrees should include work placements. Practical training is mandatory in Romania in the first cycle and in Portugal for short-cycle programmes. In France, gaining professional experience is compulsory for short cycle programmes, as well as for professionally-oriented *licence* and master programmes.

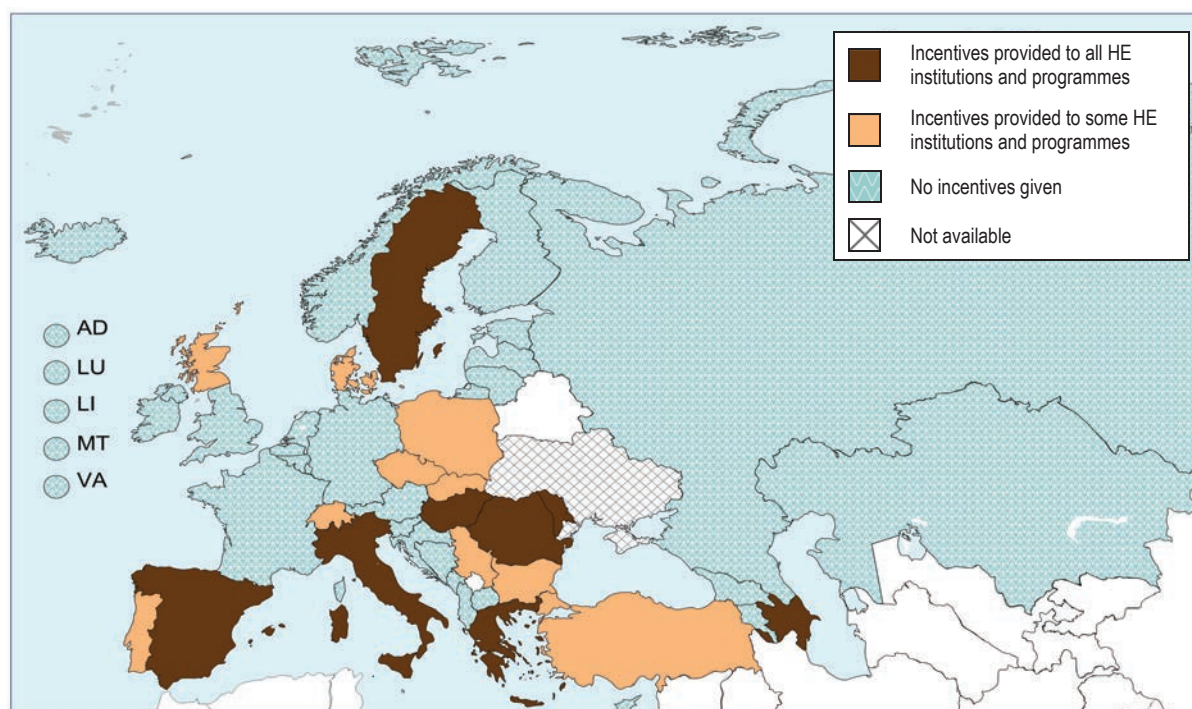
Practical training is an obligatory element of all higher education programmes in Azerbaijan, Moldova, Russia and Slovenia. In Montenegro, such an obligation is included in the draft legislation ⁽¹²⁾. In Kazakhstan, all students have the right to participate in practical training during their studies.

Besides regulations, another way in which authorities can encourage the inclusion of work placements in higher education study programmes is through the provision of public funding. Within the EHEA, 18 countries reported providing incentives to some or all higher education institutions to increase the number of available internships (Figure 6.29). Such incentives can be financial, when authorities fund or share the costs of internship programmes, even in cases where work placements are not compulsory (e.g. in Greece, Italy, Poland, Spain, Sweden, Turkey and the United Kingdom (Scotland)). Alternatively, authorities can contribute to the organisation and management of internships (e.g. in Bulgaria).

⁽¹¹⁾ Directive 2005/36/EC of the European Parliament and of the Council of 7 September 2005 on the recognition of professional qualifications, OJ L 255, 30.9.2005.

⁽¹²⁾ Adopted in October 2014.

Figure 6.29: Incentives given to institutions for work placements, 2013/14



Source: BFUG questionnaire

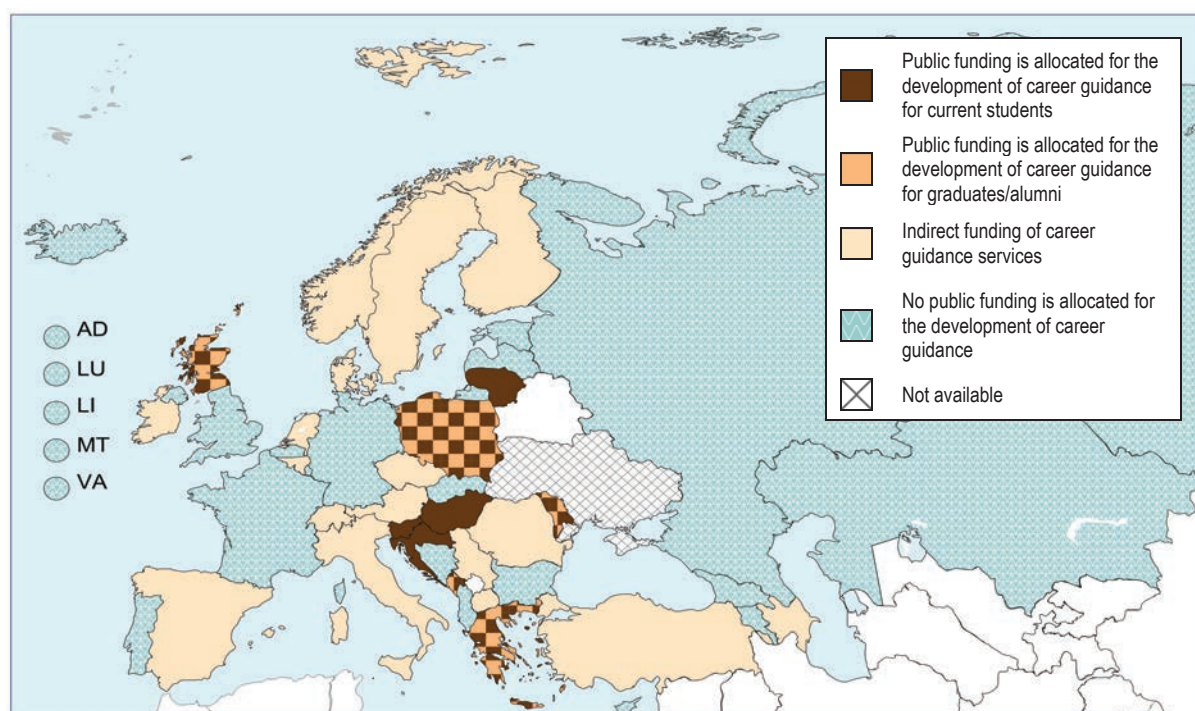
In addition to obliging or encouraging higher education institutions to include such shorter work placements in study programmes, several countries established so-called 'dual' degrees that combine theoretical studies in higher education institutions with professional experience gained at work. In this system, higher education institutions and enterprises share the responsibility for equipping students with relevant skills and competences. Such dual degree programmes exist, for example, in Belgium (French Community), Germany, France, Poland and Spain.

Career guidance

Providing labour market information, career guidance or mentoring to students is another measure to enhance the employability of graduates. Career guidance is regarded as particularly important for non-traditional learners, especially if it is provided throughout the whole student lifecycle.

Half of the higher education systems within the EHEA reported allocating public funding to develop career guidance services for current students and in some cases for graduates and/or alumni in higher education institutions (Figure 6.30). In most cases, however, higher education institutions receive a lump sum from the public budget, and it is up to higher education institutions themselves to designate a part of such funds to the development of career guidance services (indicated as "indirect funding" in Figure 6.30).

Figure 6.30: Allocation of public funding to develop career guidance services in higher education institutions, 2013/14

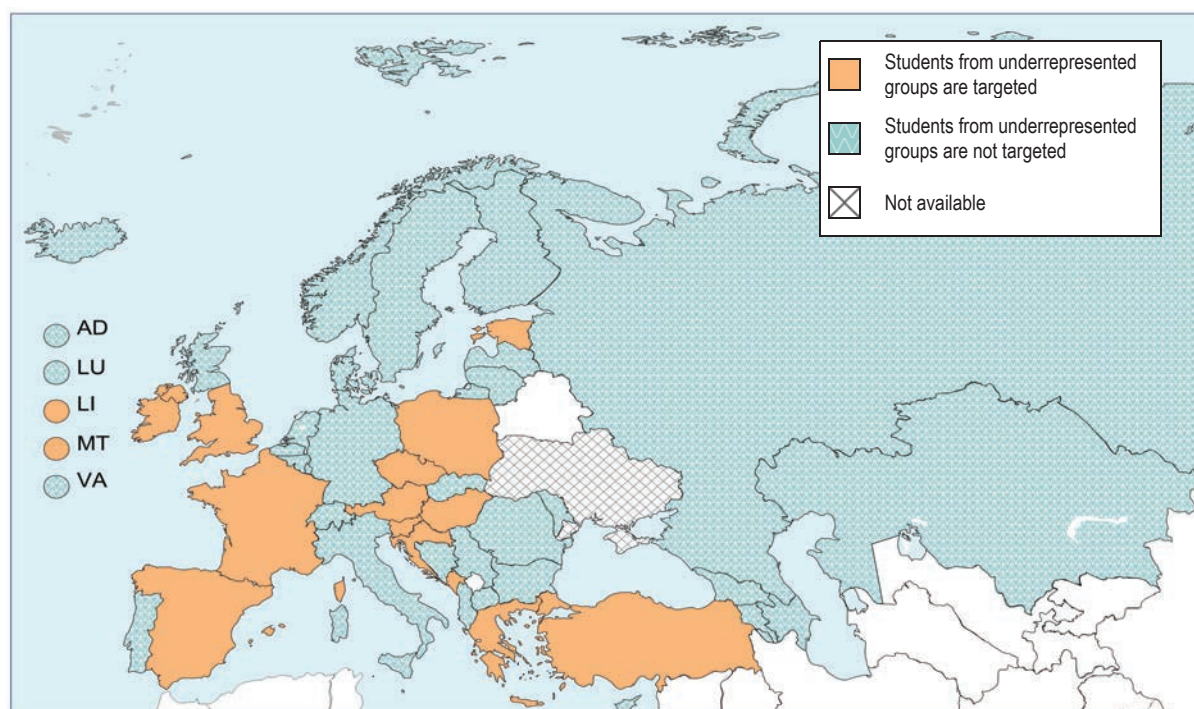


Source: BFUG questionnaire

More direct funding is made available for career guidance in Croatia, Greece, Hungary, Lithuania, Moldova, Montenegro, Poland, Slovenia and the United Kingdom (Scotland). In Greece, Innovation and Liaison offices, financed directly by public funds, have the role of providing career guidance services to students. In the other countries, public funding is allocated explicitly for the improvement of career guidance services via public tenders (Hungary), state projects (Lithuania), national strategies (Moldova), or specific national and European funds (Montenegro, Poland and Slovenia). In Croatia and the United Kingdom (Scotland), while higher education institutions receive lump sum funding, funding/outcome agreements between funding authorities and higher education institutions are meant to ensure that career guidance services receive funding for improvement.

However, students from underrepresented groups are rarely targeted by career guidance services within the EHEA: only 16 education systems reported having targeted career guidance services in higher education institutions (Figure 6.31). In almost all of them, career guidance services target students with disabilities. Gender counselling is available in Estonia and Liechtenstein. In Malta, guidance services target disadvantaged areas.

Figure 6.31: Targeted career guidance services for students from underrepresented groups, 2013/14



Source: BFUG questionnaire

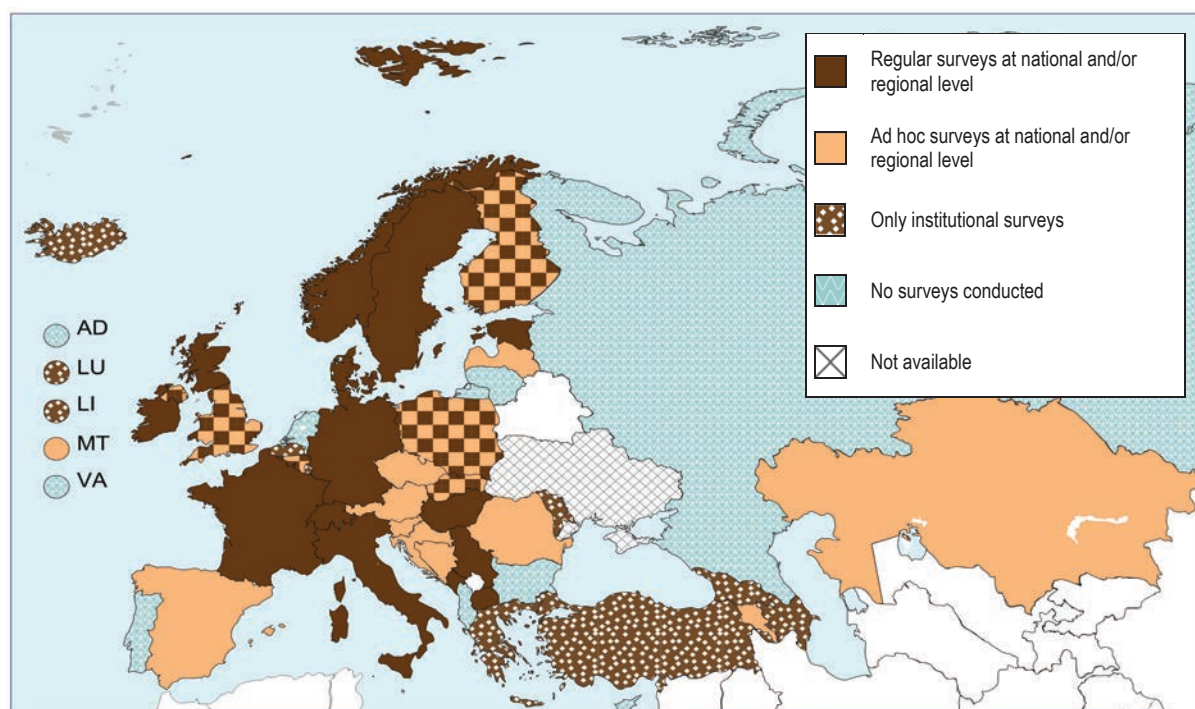
Monitoring and evaluation

Measuring employability performance is less straightforward than calculating other performance indicators. Evaluations often rely on student and graduate surveys, where students and/or graduates can evaluate their study programme as well as can provide details on their transition to the labour market. Alternatively, employers' evaluations can also inform policy-making (e.g. this is the case in Montenegro).

Graduate surveys relying on the self-assessment of graduates are valuable tools for evaluating the employability of higher education graduates. Career tracking surveys do not only provide the means to measure the percentage of graduates finding employment after graduation, but they are also able to describe the quality of jobs, the length of the job search period, graduates' job satisfaction, and the match between graduates' skills and job requirements (see Teichler, 2011). Furthermore, based on graduate surveys, it is possible to conduct analyses on the relative impact of graduates' individual characteristics and the higher education programme they attended (Ibid.). This way, such surveys are useful tools for a multi-dimensional evaluation of employability in higher education.

Graduate surveys are organised at least from time to time in the large majority of EHEA countries (Figure 6.32). At the national and/or regional level, regular surveys are conducted in 19 education systems, while ad hoc surveys take place in 16, sometimes in parallel to the regular one. There are only institutional surveys in nine EHEA countries. Nevertheless, the number of countries establishing regular graduate surveys is increasing fast, with many countries introducing such a system in recent years. Currently, a regular tracking system is being developed in Croatia and Poland.

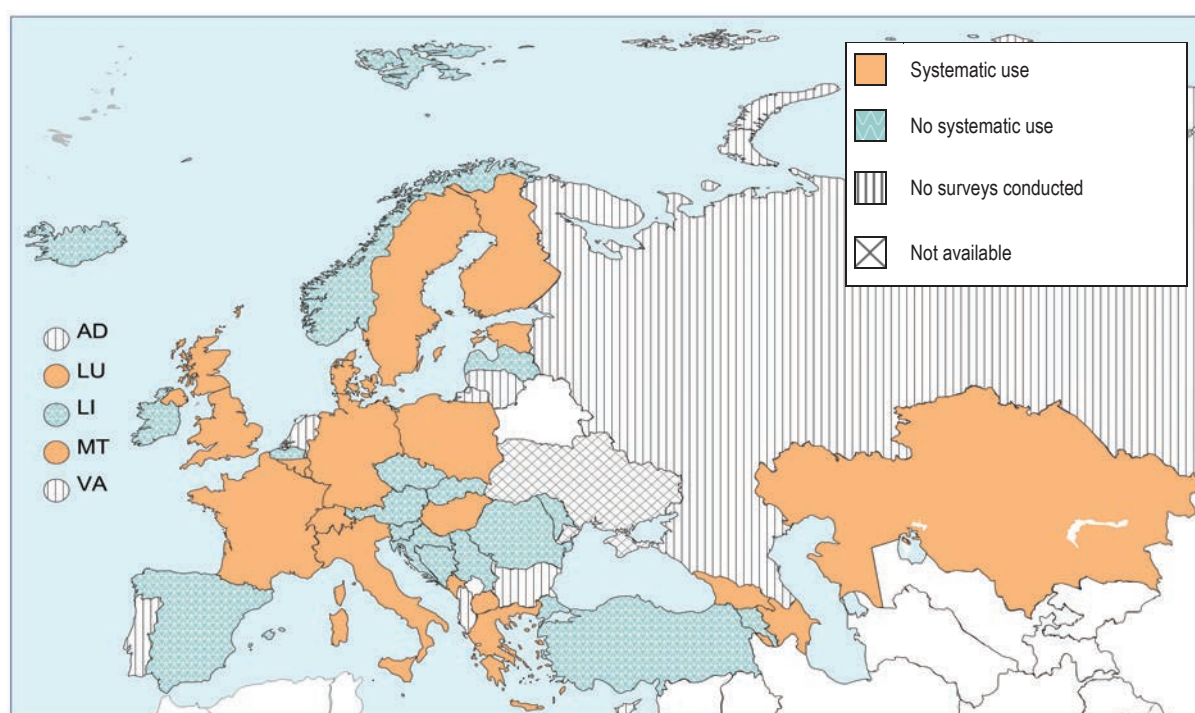
Figure 6.32: Graduate tracking surveys, 2013/14



Source: BFUG questionnaire

Within the EHEA, 22 countries reported that authorities make use of graduate tracking surveys systematically, thus based on established mechanisms and well-defined roles for responsible authorities (Figure 6.33). Most often, graduate surveys are used in quality assurance procedures (e.g. in Denmark, France, "The former Yugoslav Republic of Macedonia", Georgia, Italy, Poland, or Spain). Azerbaijan, Hungary and Kazakhstan use such survey results when setting the number of enrolment quotas or state-funded study places.

Figure 6.33: Systematic use of graduate tracking surveys in planning, 2013/14



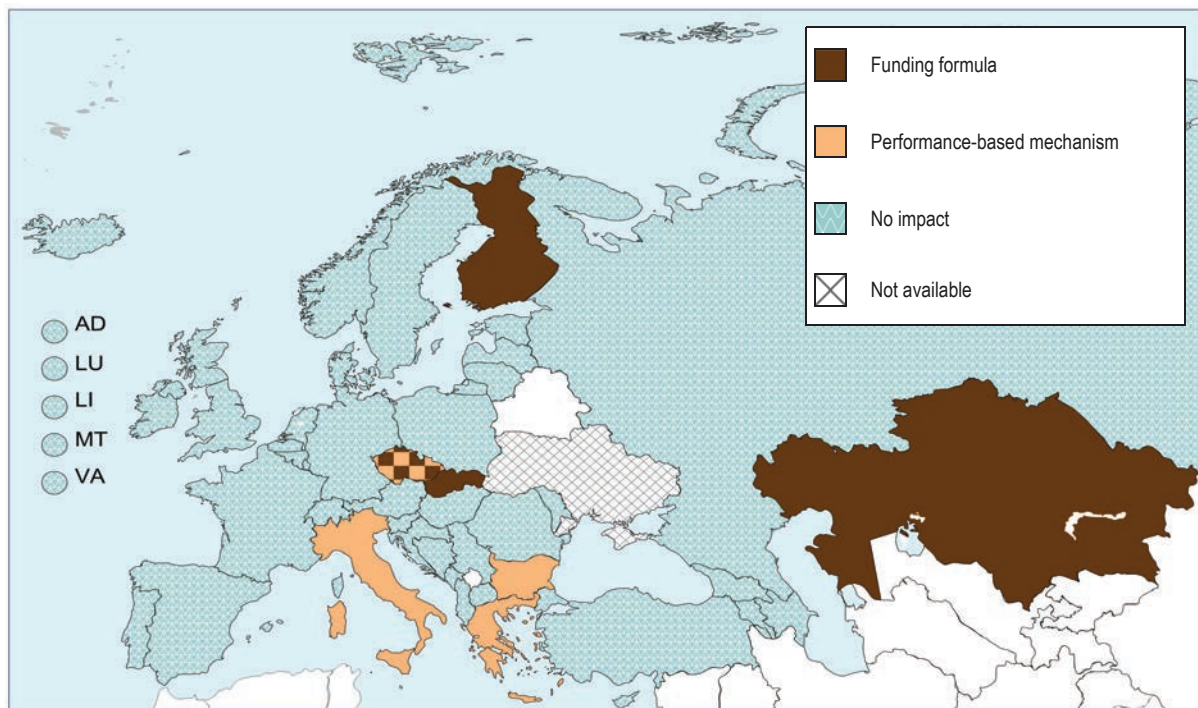
Source: BFUG questionnaire

While quality assurance is the most common evaluation mechanism in the EHEA (on quality assurance, see chapter 3), some countries have established other procedures through which the employability performance of higher education institutions can be assessed. One prominent goal of setting up such evaluation processes is to make employability-related information on higher education study programmes public. This can inform current and future students on their potential career prospects. For example, several countries (Armenia, Azerbaijan, Bulgaria, "The former Yugoslav Republic of Macedonia" and Kazakhstan) have compiled ranking systems of higher education institutions, where graduates' employment is one of the criteria. In Bulgaria, a higher education institution's place in the ranking even influences the level of state funding it receives.

Employability can also form part of performance agreements. In Austria and Liechtenstein, higher education institutions' plans for enhancing the employability of their graduates form part of the performance agreements in place.

However, the employability performance of higher education institutions influences the level of funding they receive in only a few countries: Bulgaria (see above), the Czech Republic, Finland, Greece, Italy, Kazakhstan and Slovakia (Figure 6.34). In the Czech Republic, Finland, Kazakhstan and Slovakia, graduates' employment is included in a funding formula based on which higher education institutions receive (a part of) their budget. Russia is planning to introduce such a system from 2015. In the Czech Republic, Greece and Italy, institutions can receive additional funding based on performance indicators such as the employment of graduates.

Figure 6.34: Impact of employability performance on higher education institutions' funding, 2013/14



Source: BFUG questionnaire

Conclusions

Higher education attainment levels are generally on the rise in the EHEA, and this trend is clearly to be welcomed given the fast-evolving knowledge economy challenges that are being faced. Yet many students still drop out of higher education without completing their studies. Though data availability and comparability still pose challenges, for EHEA countries with available data, less than 69 % of higher education entrants complete higher education in half of the countries.

Policy interventions to improve such performance tend to focus primarily on giving financial incentives to students to finish their studies on time. Providing specific guidance and support to those first-year students who are most likely to drop out of higher education is less widespread. Moreover, very few countries focus on the completion rates of underrepresented groups, despite the policy commitments within the Bologna Process with regard to widening participation.

Data show that higher education graduates have been hit hard by the economic crisis in terms of their employment prospects. Unemployment ratios have grown proportionally more for them than for their peers with lower levels of education; their income advantages have slightly decreased; and their over-qualification rates have increased in the period between 2010 and 2013. And while unemployment ratios are still the lowest for young people with high educational attainment in most countries, this is not true everywhere within the EHEA. In fact, in one third of the countries with available data, higher education graduates do not have the most secure position in the labour market. In a few countries this is linked to the economic crisis; in others it is due to the structure of the economy and the relatively small higher education sector. Nevertheless, in this latter group, which includes former Soviet Union member countries and countries in the Balkans, unemployment ratios of the highly educated are now decreasing.

Hitting male dominated sectors faster and more severely, the economic crisis had a different impact on the unemployment ratios of women and men. In contrast to pre-crisis years, men with low educational attainment have now higher unemployment ratios than their female counterparts, while unemployment ratios are similar for both sexes among the highly educated. This implies that obtaining a higher level qualification can improve men's employment prospects more than those of women.

All these developments highlight the need for higher education policy-makers to (re-)focus attention on the employability of graduates. Currently, while almost all EHEA countries recognise employability as a policy concern, systematic efforts including several policy elements (using labour market forecasting, involving employers, providing incentives to include work placements in many higher education programmes, improving career guidance services, monitoring performance with established feedback-mechanisms, but also encouraging student mobility or the implementation of Bologna tools) are still not applied everywhere. Nevertheless, more and more countries introduce new policies and monitoring tools such as graduate surveys in order to improve graduate employment.

Some countries apply more centralised policy tools (such as enrolment quotas, compulsory work placement, or rankings) to stimulate employability, while higher education institutions have great autonomy in others. Where this is the case, performance agreements represent a more systematic approach towards improving the employability of graduates – together with other performance indicators such as completion rates.

No matter which approaches are taken, policies have so far neglected the employability issues faced by underrepresented groups. Despite the disadvantages graduates from underrepresented groups might face in the labour market, especially in the current economic climate, the social dimension of graduates' employability is not prominent in the higher education policy agenda in EHEA countries.

CHAPTER 7: INTERNATIONALISATION AND MOBILITY

The Bucharest Communiqué

International mobility of students and staff has been a priority of the European higher education agenda since the launch of the Bologna Process. Work in this area led to the 2012 Ministerial Conference adopting a Mobility Strategy for the European Higher Education Area (EHEA) as an addendum to the Bucharest Communiqué ⁽¹⁾. The Mobility Strategy reaffirmed the mobility target formulated at Leuven/Louvain-la-Neuve in 2009 ⁽²⁾ and outlined key actions required by EHEA countries to move towards more high quality exchanges and the removal of obstacles to mobility across the continent.

While the main focus has always been placed on mobility and its growing 'global dimension', Ministers raised awareness about a broader priority of the European higher education policy agenda by introducing the term 'internationalisation' in the Bucharest Communiqué. Internationalisation of higher education has now entered the EHEA discussions and its various aspects present challenges for policy-makers.

The Bucharest Communiqué referred to several components of internationalisation. It stressed the importance of sufficient and portable support for mobile students and better balanced mobility in the EHEA. Ministers committed to examining national rules and practices with a view to dismantling obstacles to international cooperation and mobility, and encouraged higher education institutions to further develop joint programmes and degrees. The importance of fair academic and professional recognition, including recognition of non-formal and informal learning, was also underlined in the Communiqué, as it facilitates mobility and thus positively contributes to the internationalisation of higher education in Europe.

The 2012 Bologna Implementation Report

The 2012 Bologna Implementation Report mostly focused on student and staff mobility, considering this as 'the main tool of internationalisation' (European Commission/EACEA/Eurydice, Eurostat and Eurostudent 2012, p.151). It shed light on student mobility flows, while recognising that the collection of international statistical data was far from comprehensive. It addressed the question of balance in student mobility, showing East-West patterns both in European and global terms. From analysis of country information on obstacles to mobility, it concluded that many countries lacked a clear strategy and measures to tackle known obstacles. It also pointed out that monitoring mechanisms were largely absent across the EHEA.

Regarding staff mobility, the 2012 Implementation Report stressed the need to agree on the scope and definition(s), and to set quantitative targets for forms of staff mobility. It concluded that better monitoring and tackling obstacles hindering staff mobility were essential if countries were to foster staff mobility across Europe.

(1) Mobility for Better Learning: Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012.

(2) The mobility target adopted in Leuven/Louvain-la-Neuve is that at least 20 % of those graduating in the EHEA should have had a study or training period abroad by 2020. See Leuven and Louvain-la-Neuve Communiqué: The Bologna Process 2020: The European Higher Education Area in the new decade, 28-29 April 2009, p. 4.

BFUG Working Group on Mobility and Internationalisation

Between 2012 and 2015, the BFUG Working Group on Mobility and Internationalisation worked on topics that needed to be further discussed and developed at policy level across the EHEA. The working process has led to some proposals (recommendations, guidelines) on staff mobility and portability of financial support for mobile students, which are likely to be adopted by Ministers at the Yerevan Ministerial Conference set for May 2015. Moreover, the Working Group had a mandate to contribute to the evaluation of the EHEA Strategy 'European Higher Education in a Global Setting' ⁽³⁾, adopted in response to the growing interest for the Bologna reforms in other parts of the world. The purpose of the exercise was to assess developments under the five priority areas ⁽⁴⁾ of the Strategy at various level – national, institutional and European – since its adoption in 2007.

Chapter outline

This chapter aims to give a picture of where the EHEA countries stand within the higher education internationalisation process, to report on the progress made on mobility issues since 2012 and to highlight some elements where further developments are most needed. The first part focuses on the engagement of EHEA countries with internationalisation in higher education. It brings new information compared to the 2012 reporting exercise as it looks at national strategies and steering documents, stakeholder participation, budget and incentives for internationalisation, as well as institutional strategies and internationalisation instruments. It also examines which geographical regions are favoured in internationalisation activities.

The second part addresses mobility issues. Firstly, it looks at student mobility, providing data and analysis on student mobility flows, examining target setting and reporting on obstacles to student mobility as well as on measures to tackle these obstacles. Secondly, it examines staff mobility issues, presenting national policy goals and programmes, addressing targets and also reporting on obstacles and measures put in place to reduce these obstacles.

7.1. Engagement with internationalisation

Twenty years ago, the concept of internationalisation was, for most observers, almost, if not fully, identical with mobility of students (and, to a lesser extent, staff) across country borders (Wächter 2008, pp.13-14). However, this concept has evolved over the years and there is now a clear distinction to be made between internationalisation and mobility. The Canadian scholar Jane Knight has defined internationalisation as: 'The process of integrating an international, intercultural, or global dimension into the purpose, functions and delivery of post-secondary education' (Knight 2003, p.2). Internationalisation is thus now a 'many-faceted phenomenon' (Wächter 2008, p.13) and encompasses various forms of activities. Among them, international mobility (mainly student mobility) remains the most visible.

It is now generally acknowledged that internationalisation offers benefits to students, staff, higher education institutions and countries, even though it poses various challenges at different levels. This first section looks at different aspects of countries' engagement both at national and institutional levels. It is important to keep in mind that the assessment of engagement at institutional level is based on countries' central-level perceptions, which may differ from the perceptions of higher education institutions themselves.

⁽³⁾ European Higher Education in a Global Setting. A strategy for the External Dimension of the Bologna Process, 2007.

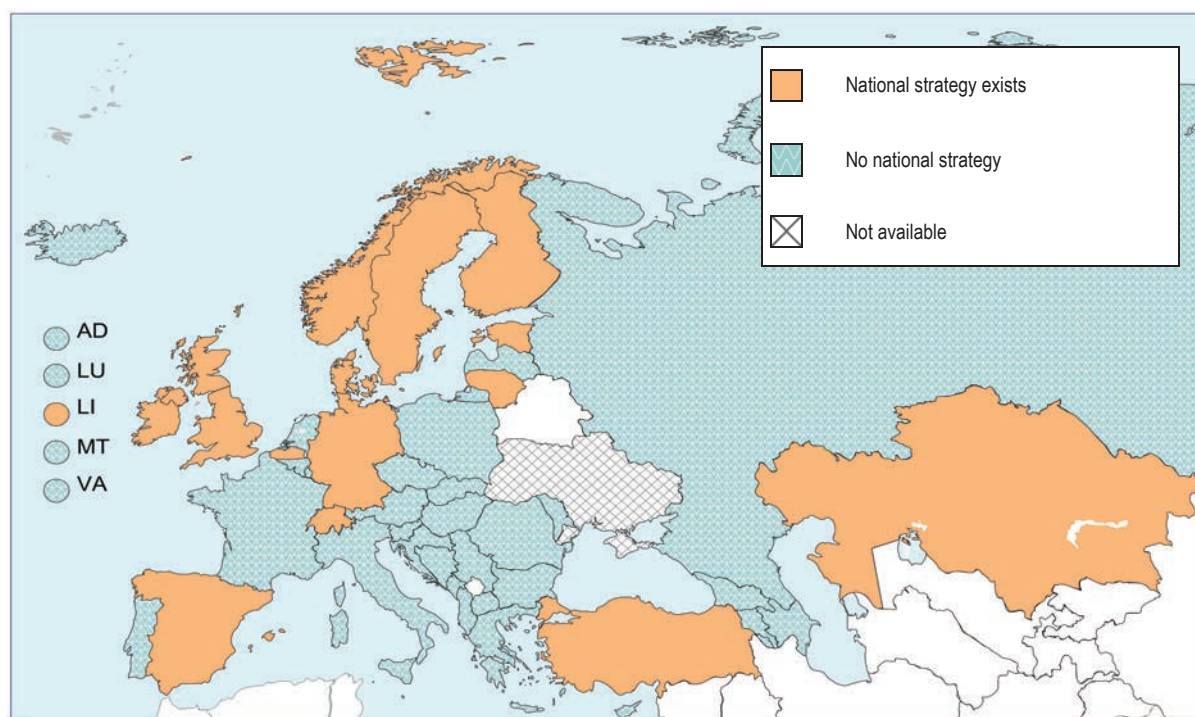
⁽⁴⁾ The five priority areas of the Strategy 'European Higher Education in a Global Setting' are: information on the EHEA, promotion and attractiveness, policy dialogue, partnership and recognition.

7.1.1. Engagement at national level

National strategies for internationalisation

Through the 2012 Mobility Strategy, countries were encouraged to 'develop and implement their own internationalisation and mobility strategies' ⁽⁵⁾. Figure 7.1 provides an overview of the situation regarding the adoption of national strategies for internationalisation across the EHEA. It shows that countries with such strategies are currently in the minority (16 of the 48 systems covered by the present report). Nevertheless, a number of countries reported that they were developing or about to adopt a national strategy when the data was collected (Croatia, France, the Netherlands, Portugal).

Figure 7.1: National strategies for internationalisation of higher education, 2013/14



Source: BFUG questionnaire

While the concept of 'national strategy' can be interpreted broadly, this may lead to difficulties in comparing country realities. In some countries, the strategy is found in a self-contained document, while in others it is part of a global national higher education strategy or even of an economic strategy. Strategies can also be very general, or they may focus on specific topics. Some outline general objectives whereas others list very concrete measures or set measurable mobility targets.

One recent example is the adoption in April 2013 by the Federal Government and the *Länder* in Germany of a common internationalisation strategy. This defines nine fields of action for promoting the internationalisation of higher education institutions, and specifies a joint policy goal with strategies for each field. Both Federal Government and *Länder* are responsible for implementing the joint internationalisation goals. Another recent development, the national strategy of Belgium (Flemish Community), differs significantly from this model, as it has been developed as an action plan and focuses exclusively on mobility issues. In Norway the strategy has been presented in the form of a report, with a list of objectives. In Estonia, the Strategy for the internationalisation of higher education is part of the global 2006-2015 Strategy for Higher Education ⁽⁶⁾. It addresses significant issues such

⁽⁵⁾ Mobility for Better Learning: Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012, p.1.

⁽⁶⁾ Since the beginning of year 2014 came into force the Estonian Lifelong Learning Strategy 2020 and internalisation of higher education is also included in this strategy.

as the legal environment that supports internationalisation (quality assurance, migration policy, recognition of qualifications) and the internationalisation of study programmes, and sets quantitative targets both for students and staff mobility. Ireland's International Education Strategy 2010-2015 clearly encourages higher education institutions to develop comprehensive internationalisation strategies, while providing a list of areas to be considered in these strategies. The strategy also includes guidelines for increasing outward student mobility.

Among the countries that have adopted a national strategy for internationalisation of higher education, only four (Finland, Ireland, Lithuania and the United Kingdom (Scotland)) have undertaken any evaluation in order to measure their impact and outcomes. Strategies have been assessed by ministries of education in Finland, Ireland and Lithuania and by the Scottish Parliament and its committees in the United Kingdom (Scotland).

Given that internationalisation strategies were almost inexistent in the EHEA a few years ago, it seems that developments in this area are currently moving rapidly. It will also be interesting to see to what extent the 2013 "European higher education in the world" strategy, which encourages EU member states to develop 'comprehensive internationalisation strategies', will also have an impact on EU and non EU countries (European Commission 2013b, p.3).

National steering documents

Although only a minority of countries have developed comprehensive internationalisation strategies, it is nevertheless common to find reference to internationalisation and its different components in steering documents. The most common aims or objectives mentioned in these documents refer to increasing the mobility flows of students and staff, improving the quality of higher education, and enhancing the attractiveness and competitiveness of national higher education institutions. Engaging in more joint programmes/degrees and in other types of international collaboration are also important aims for many countries.

EHEA countries' steering documents also encompass a wide range of measures for implementing internationalisation of higher education. For example, in order to recruit more international students, a certain number of countries have improved existing or developed new information channels (mainly websites) about their programmes or their higher education institutions/systems. Poland has developed a new portal for candidates from abroad available in several foreign languages. In the Czech Republic, the Strategic Plan for 2011-2015 recommends the participation in international affairs and collaboration with embassies as channels to promote Czech higher education abroad. The Danish government, through its Action Plan launched in June 2013, intends to enter into dialogue with private foundations and businesses in order to encourage them to provide scholarships or grants for attracting skilled international students. It also proposes several concrete initiatives to facilitate international graduates' transition to the Danish labour market. Some countries also reported the provision of courses or study programmes in foreign languages as a means of recruiting foreign students.

In order to encourage outward mobility, some countries have taken action to provide more and better information/advice to students interested in studying abroad. Other countries stimulate student mobility through the promotion of international work placements and the provision of study programmes that include a mobility window ⁽⁷⁾.

Many other measures to foster student (or learning) mobility are mentioned in steering documents, such as promoting language learning, improving recognition procedures, providing financial support for mobile students (in some cases with a focus on master degree students and doctoral candidates), ensuring the portability of grants and loans, including social dimension objectives in financial support

(7) A mobility window is defined as period of time reserved for international student mobility that is embedded into the curriculum of a study programme (Ferencz, Hauschildt and Garam, 2013).

for mobility ⁽⁸⁾ or simplifying visa and residence/work permit procedures for students. Making use of Bologna tools such as the Diploma Supplement and taking part in European programmes are also frequently mentioned.

Some countries also mention measures to increase the recruitment of international staff, and others aim to facilitate the development of joint programmes/degrees, summer schools or other types of collaboration (e.g. joint research projects). For example, in Italy, the requirements on higher education institutions for establishing a joint or international programme have been made less restrictive.

Stakeholders involved in the internationalisation process

In the majority of systems, ministries of education, higher education, foreign affairs, research, economic development, employment or industry, are all involved to a certain extent in the internationalisation of higher education. In France, a new structure has been established (*MEIRIES - Mission Europe et International pour la Recherche, l'Innovation et l'Enseignement Supérieur*) to define a European and international strategy and to coordinate the implementation of initiatives and international schemes for higher education, research and innovation.

In some countries, other national bodies such as public agencies are also involved. The most striking example is the German Academic Exchange Service (DAAD) in Germany, which is an association of higher education institutions and student organisations receiving governmental funding. It is the largest agency focusing on the internationalisation of higher education in Europe – and also in the world. It offers programmes and funding for supporting the mobility of students, academic staff and researchers. It also represents the German higher education system abroad, promotes Germany as an academic and research destination, and helps build ties between institutions around the world. Other examples are Nuffic (Netherlands), the Centre for International Cooperation in Higher Education (SIU) (Norway), the British Council (United Kingdom), the Centre for International Mobility (CIMO) (Finland), Campus France (France) and the Archimedes Foundation (Estonia). Although different in their structure, all these agencies promote the national higher education systems abroad. They can also be involved in activities such as the management of mobility programmes, the recognition of qualifications, or supporting foreign students.

The Wallonia-Brussels Campus in Belgium (French Community) is an example of a recent development in this field. It was established in 2010 by the Ministry for Higher Education and Wallonia-Brussels International with the main objective of promoting French-speaking Belgium higher education abroad.

In some countries, national agencies that have the primary function of administering EU programmes such as Erasmus also act as promoters of internationalisation more generally. National agencies, while raising the visibility of their national institutions and education system may also, to a certain extent, play a role in raising the visibility of the EHEA as a whole (by providing, for example, information on the EHEA with links to other national systems). However, there is little evidence to suggest that this is common practice among EHEA countries at the moment. Cooperation between national agencies is therefore an issue to be considered particularly to support EHEA countries that do not yet have well-developed national promotion infrastructure or resources.

In addition to national agencies, other national stakeholder organisations can play a role in the internationalisation of higher education. The most commonly reported examples are the national higher education associations or Rectors' Conferences. Some countries have specific intermediary organisations to support higher education institutions in their internationalisation activities. For

⁽⁸⁾ By means, for example, of giving extra funding to students underrepresented in mobility: students from a low educational background, with delayed transition into higher education, older students, students with children, with disabilities, from ethnic minorities or with migration background, working students, etc.

example, in Belgium (French Community), the newly established International Relations Commission, within the Academy for Research and Higher Education, plays a coordinating role for the international relations of higher education institutions at inter-institutional level. The United Kingdom (Scotland) presents an interesting example of an alternative model to the national agency by combining the work of existing bodies. The government, its enterprise agencies and funding council, the umbrella body for Scottish universities and a number of non governmental organisations thus collaborate towards a 'Connected Scotland' approach which coordinates activities on internationalisation.

This overview shows that EHEA countries do not follow a single model in working with internationalisation stakeholders. A range of Ministries with different portfolios may be involved and many countries have established publicly funded internationalisation agencies with different tasks and responsibilities, and also with various levels of engagement with higher education institutions.

Budget and incentives for internationalisation

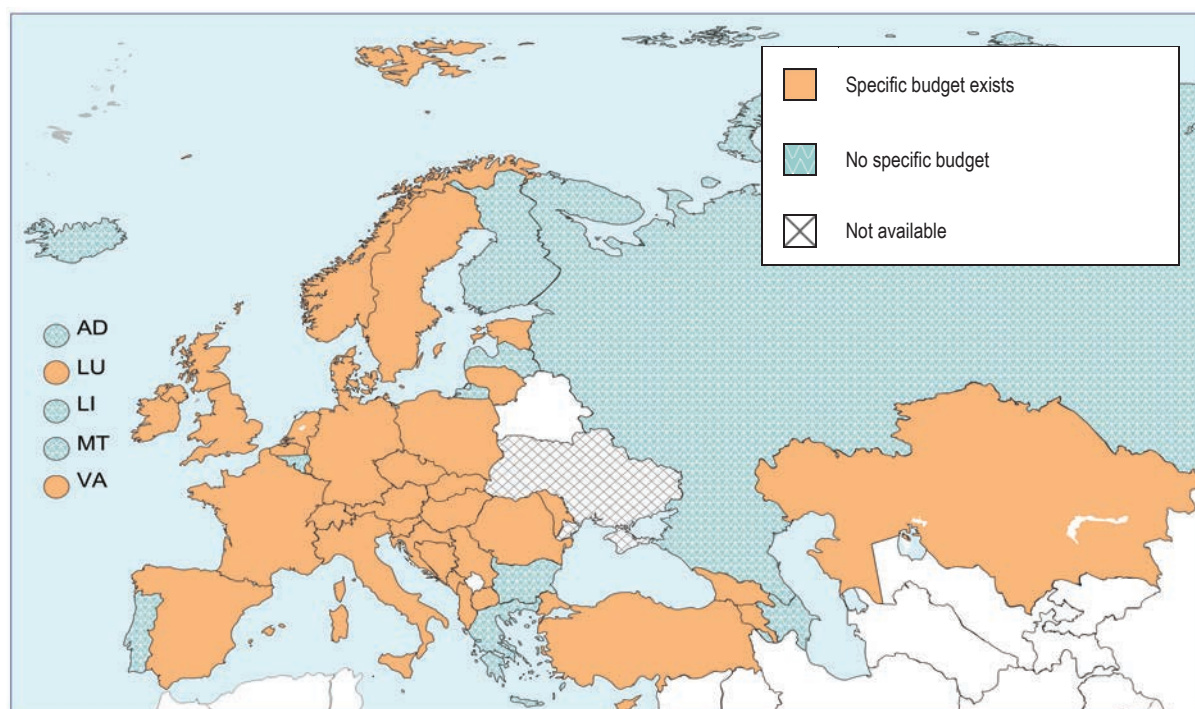
Figures 7.2 and 7.3 show that countries commonly allocate budgets and provide incentives for internationalisation activities. Indeed, only Andorra, Azerbaijan, Liechtenstein, Malta and Portugal report no specific budgets or incentives in this area.

Figure 7.2 focuses on specific budgets for funding internationalisation activities in higher education (see Figure 7.2). The majority of countries report having such budgets, but also that this funding is mostly allocated specifically for mobility. For instance, in Belgium (Flemish Community), the budget for mobility grants to students amounted to 3.8 M€ in 2013-2014, and will increase to 7 M€ by 2019-2020. In Italy the dedicated budget for internationalisation activities includes 12 M€ for outgoing credit mobility and 5 M€ for outgoing credit mobility for placements abroad, but also 1.5 M€ for joint programmes and for international students. The multiannual strategic planning allocates further resources (up to 13 M€) to internationalisation and mobility.

In the Czech Republic, a special budgetary item, for international cooperation amounts to roughly 2 % of the budget for all educational activities, while in Switzerland, 2.1 million Swiss francs (c. 1.7 M€) are allocated between 2013 and 2016 on an internationalisation programme for Universities of Applied Sciences.

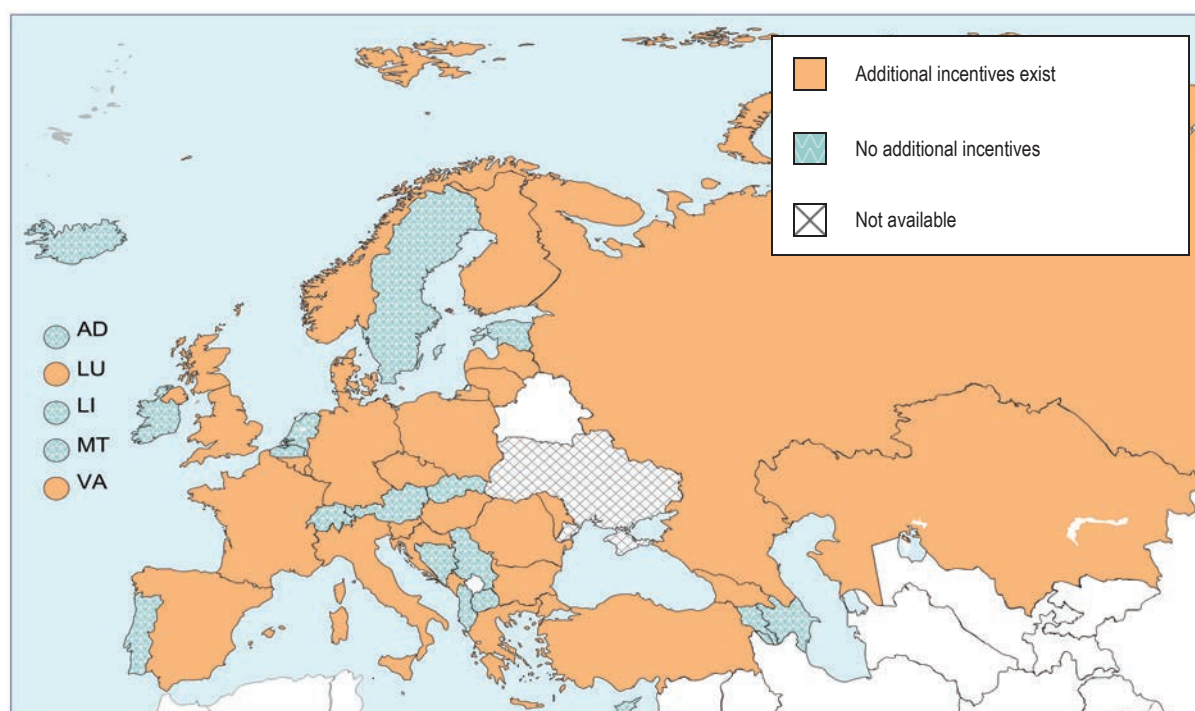
Some countries refer to internationalisation as one of the areas specified in the performance and funding contracts between the higher education institutions and the government. For instance, in Croatia, within pilot programme agreements concluded between the Ministry and higher education institutions on funding teaching activities, some higher education institutions have chosen internationalisation as a specific aim and this entitles them to additional funding. In Finland, a high level of internationalisation activity is also rewarded through the funding model, with student mobility and the number of foreign staff being examples of criteria triggering additional resources. Funding for various aspects of internationalisation in higher education institutions is also allocated by the national agency responsible for internationalisation (CIMO) as well as other actors. In Poland, an internationalisation index (calculated on the basis of the number of incoming and outgoing international students in all three cycles) is one of the elements of the formula used for calculating the annual amount of funding for teaching.

Figure 7.2: Specific budget for internationalisation activities in higher education, 2013/14



Source: BFUG questionnaire

Figure 7.3: Other incentives for higher education institutions to engage in internationalisation activities, 2013/14



Source: BFUG questionnaire

Roughly 60 % of the EHEA countries provide other incentives for higher education institutions to engage in internationalisation activities (see Figure 7.3). Denmark, France and Norway give examples of non-financial incentives. In Denmark, contracts between the Ministry of Higher Education and Science and higher education institutions on goals to be achieved focus, among other things, on internationalisation. France reports that a regulation based on more flexible arrangements for setting up degrees in international partnerships and '*co-tutelles de thèse*' (joint supervision of thesis) are a valuable stimulus for internationalisation. Meanwhile in Norway, the Quality Reform assuring the right

for students to take study periods abroad has led Norwegian universities and university colleges to sign cooperation agreements with a large number of foreign institutions.

The role of EU-funded mobility programmes (e.g. Erasmus+, Horizon 2020, Tempus, Erasmus Mundus ⁽⁹⁾) is also emphasised by many countries. These programmes provide important incentives that are often particularly valued in non-EU countries. Georgia, Moldova and Turkey all pointed to the impact of EU mobility programmes. Within the EU, Lithuania and Slovenia mention projects funded by the EU Structural funds which in their case include co-financing for internationalisation activities.

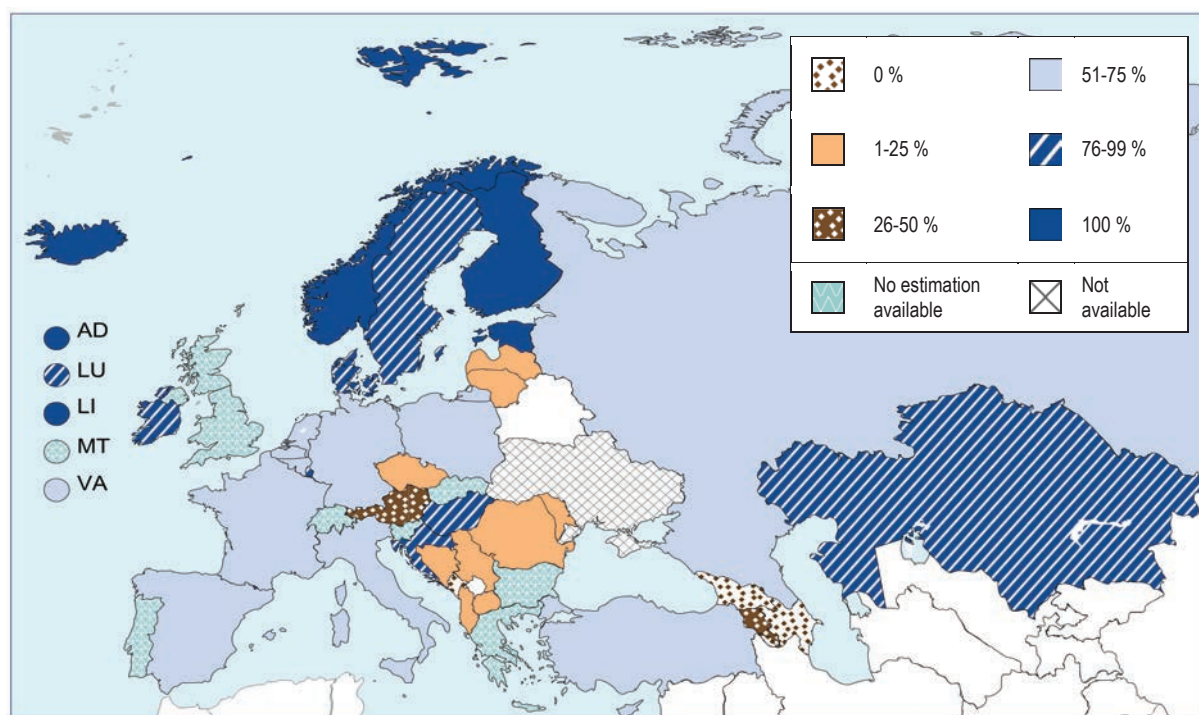
Including internationalisation as a criteria for external quality assurance is also becoming a more common practice, and could be considered as an indirect incentive for higher education institutions to engage more strongly in internationalisation activities.

7.1.2. Engagement at institutional level

Through the 2012 Mobility Strategy, ministers encouraged higher education institutions 'to adopt and implement their own strategy for their internationalisation and for the promotion of mobility in accordance with their respective profile and involving the stakeholders (students, early stage researchers, teachers and other staff)' ⁽¹⁰⁾. This section therefore focuses on internationalisation at institutional level using data provided through the BFUG questionnaire. While the information provided may represent national authority perceptions accurately, this may differ from the perceptions of higher education institutions themselves.

Countries were asked to estimate the percentage of their higher education institutions that have adopted an internationalisation strategy. The concept of 'internationalisation strategy' is broad and countries may interpret it differently, but Figure 7.4 shows that quite different realities coexist in the EHEA.

Figure 7.4: Estimated percentage of higher education institutions that have adopted an internationalisation strategy, 2013/14



Source: BFUG questionnaire

⁽⁹⁾ Tempus and Erasmus Mundus programmes are now part of the global Erasmus+ programme.

⁽¹⁰⁾ Mobility for Better Learning: Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012, p.5.

Roughly 60 % of the EHEA countries report that more than half of their national higher education institutions have adopted internationalisation strategies. Among these, Andorra, Estonia, Finland, Iceland, Liechtenstein and Norway report that all higher education institutions have an internationalisation strategy.

Conversely, about 40 % of the countries where data is available estimate that less than 50 % of their institutions have adopted an internationalisation strategy, with Azerbaijan, Georgia and Montenegro stating that none of their higher education institutions have such a strategy.

Nevertheless, the lack of an institutional strategy for internationalisation does not necessarily mean that higher education institutions are not engaged in internationalisation activities. For instance, Azerbaijan and Georgia both report that their higher education institutions are engaged in international activities despite the lack of any formal strategy at institutional level. Azerbaijan reports that all institutions are involved, while Georgia estimates that 26 to 50 % of national higher education institutions take part in internationalisation activities. Similarly, Armenia and Austria estimate that a minority of their national higher education institutions have adopted an internationalisation strategy (26 % to 50 %), but specify that 76 % to 99 % of their higher education institutions are actively involved in internationalisation activities.

The main conclusion is that higher education institutions are widely perceived to be highly engaged in internationalisation activities whether or not they have a formal strategy. However, in the light of evidence-based and policy-oriented research demonstrating that institutional strategies have a significant impact on internationalisation activities (EUA 2013, p.10) the adoption of such strategies could be further encouraged. This could be done, for instance, through national strategies as in Ireland, or through other guidance instruments such as the Belgian (French Community) tool 'DIES' (*Descripteurs d'internationalisation pour l'enseignement supérieur*). This tool was recently developed by the Ministry together with the Bologna Experts and aims to support all higher education institutions in developing, implementing and assessing their internationalisation strategy.

In today's landscape, higher education institutions have an increasing choice of instruments or activities to engage in the internationalisation process (e.g. joint programmes and joint degrees, campuses abroad, massive open online courses (MOOCs)). Nevertheless, the development of these instruments greatly depends on factors such as the available resources at institutional level. In some countries, national legal frameworks as well as institutional regulations can also hinder the development of these internationalisation instruments.

Joint programmes and joint degrees

A joint programme is an integrated curriculum coordinated and offered by a consortium of two or more higher education institutions. A joint degree is a single document awarded to students who successfully complete a joint programme, and it should be recognised as the legitimate award for such a programme.

A survey of 245 higher education institutions from 28 different countries (EHEA and non-EHEA countries) conducted in 2011 showed that the top motivations for developing joint programmes are broadening educational offerings, strengthening research collaboration, advancing internationalisation, and raising international visibility/prestige (Obst, Kuder and Banks 2011, p. 7).

These instruments have long been recognised as a key element in facilitating internationalisation strategies in higher education institutions, through encouraging institutions to address very pragmatic challenges in working together across national boundaries. Thus from the early Ministerial declarations in the Bologna Process onwards, there have been commitments to develop further these instruments – particularly in light of the launch of the Erasmus Mundus programme which began five years after the Bologna Declaration was signed.

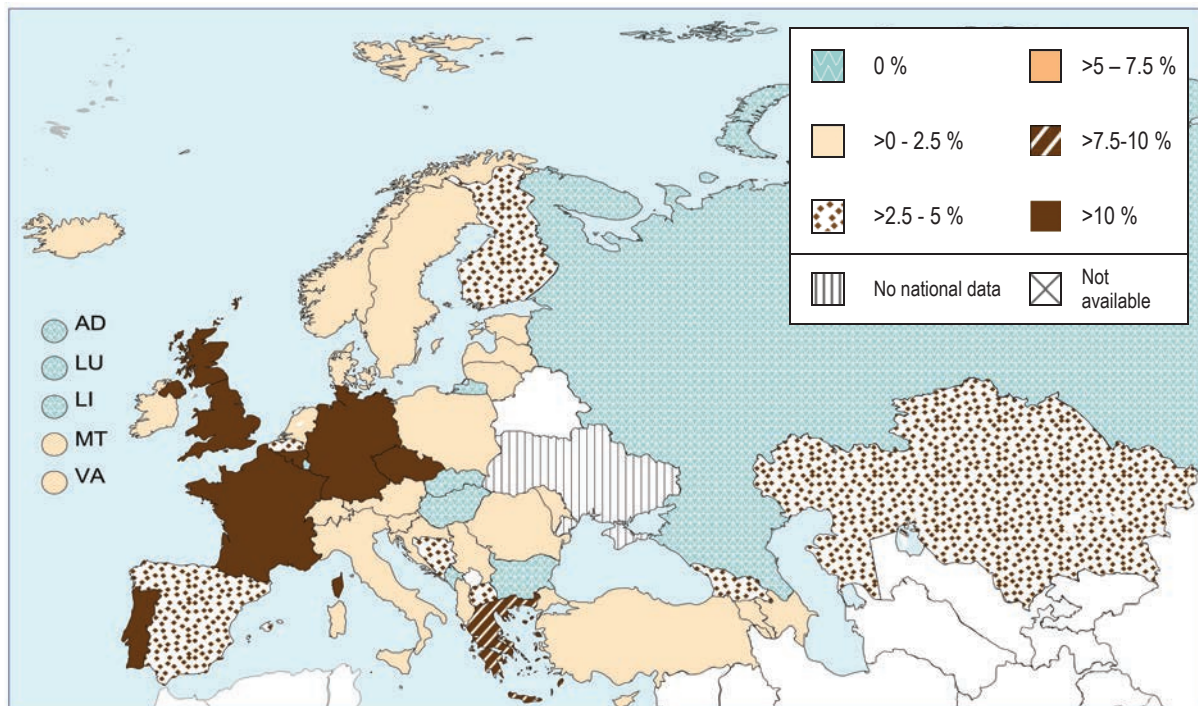
While the challenges to higher education institutions in developing cross-border joint programmes have been quite wide-ranging, one of the main issues for governments has been to create a legal environment where joint programmes can be established and recognised without undue problems. Although the vast majority of countries have now amended their legislation to take on board joint programmes and joint degrees, they continue to be on the agenda.

A number of countries, (Andorra, Armenia, Bulgaria, Cyprus, Hungary, Liechtenstein, Malta, Moldova, Slovakia, Switzerland and the United Kingdom) point out they have not developed explicit notions of joint programmes and joint degrees. In these cases, there may be some ambiguity with regard to legislation. Among these countries, only Andorra, Bulgaria and Liechtenstein estimate that none of their higher education institutions are involved in joint programmes and joint degrees.

Moreover, even in countries where it is possible to develop joint programmes and recognise joint degrees, there may be problems in recognising quality assurance decisions related to joint programmes. This was reported in more than half of the countries. Several countries also explain that their legislation allows higher education institutions to establish joint programmes, but they have not developed a mechanism to award joint degrees. For instance, 10 to 25 % of Russian higher education institutions are estimated as being involved in joint programmes, while they are not allowed to award joint degrees (see Figures 7.5 and 7.6). Similarly, 100 % of the institutions are estimated being involved in joint programmes in Switzerland, but a very low percentage of institutions award joint degrees (0-2.5 %).

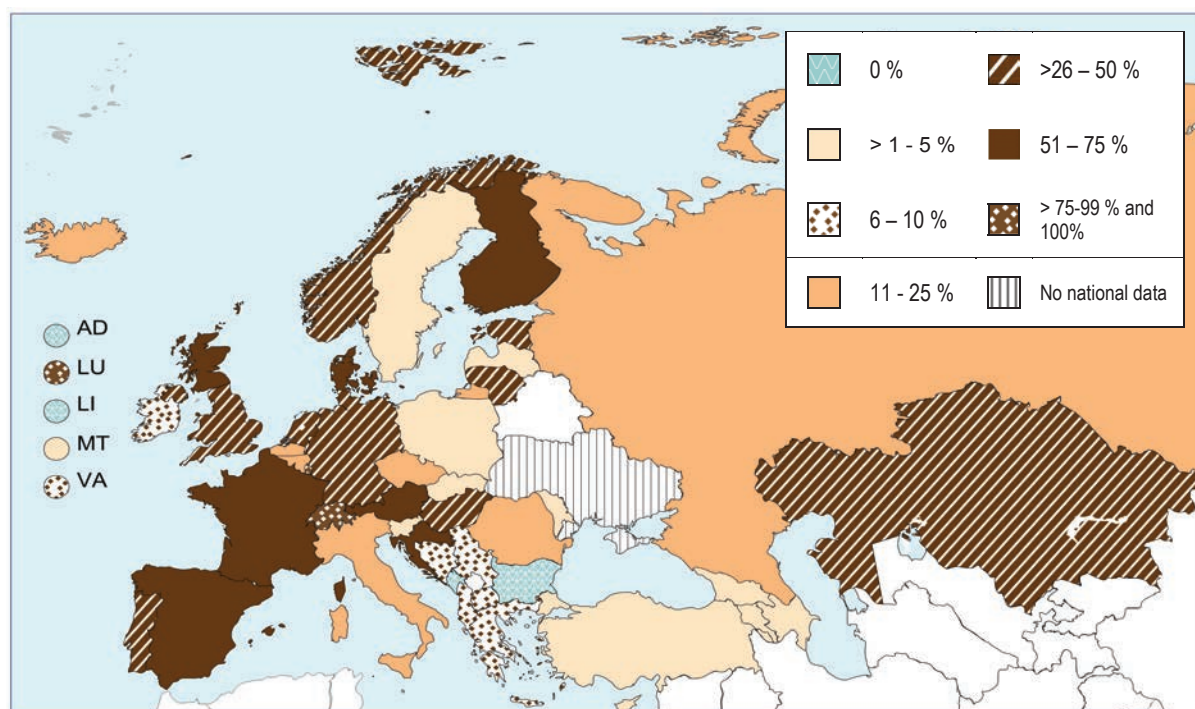
Similarly, compared to the data in 2012, and not surprisingly, countries estimate a much higher number of higher education institutions participating in joint programmes than those actually issuing joint degrees (see Figures 7.5 and 7.6). However, numbers do not reach particularly high values. Indeed, in the majority of countries, less than 25 % of higher education institutions are estimated to be participating in joint programmes. Besides, the data does not provide the number of joint programmes per institution nor the number of students enrolled in these programmes.

Figure 7.5: Estimated percentage of institutions that award joint degrees, 2013/14



Source: BFUG questionnaire.

Figure 7.6: Estimated percentage of institutions that participate in joint programmes, 2013/14



Eight countries consider that no institutions issue joint degrees, and this is likely to be an underestimation given the answers on adaptation of legislation to facilitate joint degree recognition. At the other end of the spectrum, only Belgium (French Community), Czech Republic, France, Germany, Portugal and the United Kingdom have more than 10 % of their higher education institutions issuing joint degrees. The majority of countries estimate that only up to 2.5 % of their institutions issue joint degrees.

From an institutional perspective an important condition for developing joint programmes is to ensure sustainable funding for these programmes. However, the key issue that emerges from country answers is that the vast majority of countries are not providing any additional funding for this kind of programme. As the costs associated to developing and maintaining programmes with several institutions in different countries exceed those for provision within a single institution, this provides a major barrier to joint programmes. Indeed, it appears that the majority of costs are currently met either by European funding mechanisms (for example, through the Erasmus Mundus programme), or by higher education institutions prioritising the funding of flagship joint programmes over their other programmes.

Only a minority of countries (Albania, Finland, Germany, Italy, Lithuania, Luxembourg, Norway, Romania and Spain) report that they provide specific, additional funding to higher education institutions for the development and implementation of joint/double degree programmes. In Finland, for instance, the nationally funded instruments managed by CIMO include the Finnish-Russian Student and Teacher Exchange programme (FIRST) for cooperation with North-Western Russia and CIMO's China Programme for educational cooperation. Both provide support for the development of joint/double degrees, among other cooperation activities. In Italy, in 2012, 1M€ was allocated to higher education institutions which already had joint programmes as 'premium' funding for further development. In 2013, a further 1,5M€ was allocated to higher education institutions on the basis of active joint programmes and international mobility. These resources can be used by higher education institutions to further develop joint programmes. In Lithuania, 18.5 M€ from European structural funds have been allocated to finance the development of joint degree programmes.

A specific programme for the funding of joint degrees has been established in Norway. The programme is administered by the national agency (SIU), and funding is allocated to higher education institutions after a competition. In 2014 Norwegian higher education institutions can apply for financial support to develop international joint degree programmes at Masters and PhD-level.

In Romania, the funding mechanism for universities encourages them to develop programmes in foreign languages and joint doctoral programs by assigning an additional fund on these grounds.

Beyond funding, language issues, institutional regulations (e.g. accreditation process) or quality assurance are other challenges related to joint programmes. About the two latter issues, progress has been made since the last Ministerial Conference in Bucharest. Indeed, a group of experts have developed the 'European Approach for Quality Assurance of Joint Programmes' in order to ease external quality assurance of these programmes. It especially aims to dismantle an important obstacle to the development of joint programmes by setting standards that are based on the agreed tools of the EHEA ⁽¹¹⁾, without applying additional national criteria. The 'European Approach for Quality Assurance of Joint Programmes' has been endorsed by the Bologna Following-Up Group (BFUG) and will be submitted for approval by EHEA Ministers at the Yerevan Ministerial Conference in May 2015 ⁽¹²⁾.

This recent developments at the European level are a step towards fewer obstacles to the development of joint programmes. However, numbers are still relatively low in a majority of countries. Besides, there seems to be confusion on the question of joint programmes and joint degrees according to countries answers. It is thus difficult to draw a clear picture of the current situation in the EHEA. This question should be addressed in the next period with a view to improve the understanding and the collection of data.

Campuses abroad

Setting campuses abroad can also serve the internationalisation process at institutional level. According to Hénard, Diamond and Roseveare (2012, p.14), there are several motivators in deciding whether to set up and operate campuses abroad, such as revenue generation, increase international prestige or the desire to improve the internationalisation of the home campus.

However, there seems to be a rather limited use of this internationalisation instrument across the EHEA. Indeed, about half of the systems (24) report having institutions that have set up one or more campuses abroad (Figure 7.7), but according to the data, the number of campuses is almost always fewer than ten.

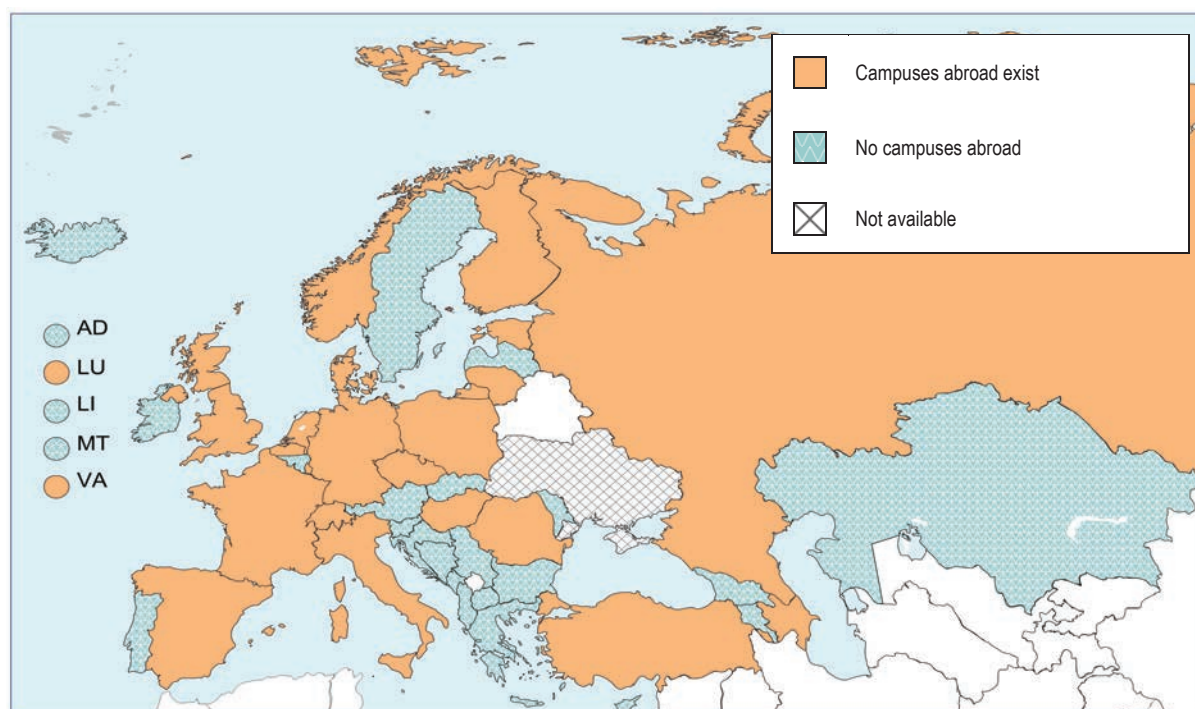
Reported information also shows confusion on what constitutes a campus abroad, suggesting that 'campus abroad' encompasses various institutional arrangements or models.

The main locations of campuses abroad are described in section 7.1.3.

⁽¹¹⁾ The agreed tools are the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) and the Qualifications Framework for the European Higher Education Area (QF-EHEA)

⁽¹²⁾ *European Approach for Quality Assurance of Joint Programmes*, endorsed by the BFUG, subject to approval by EHEA ministers, October 2014. Available at: <https://www.eqar.eu/projects/joint-programmes.html>.

Figure 7.7: Countries where higher education institutions have campuses abroad, 2013/14



Source: BFUG questionnaire

Massive open online courses (MOOCs)

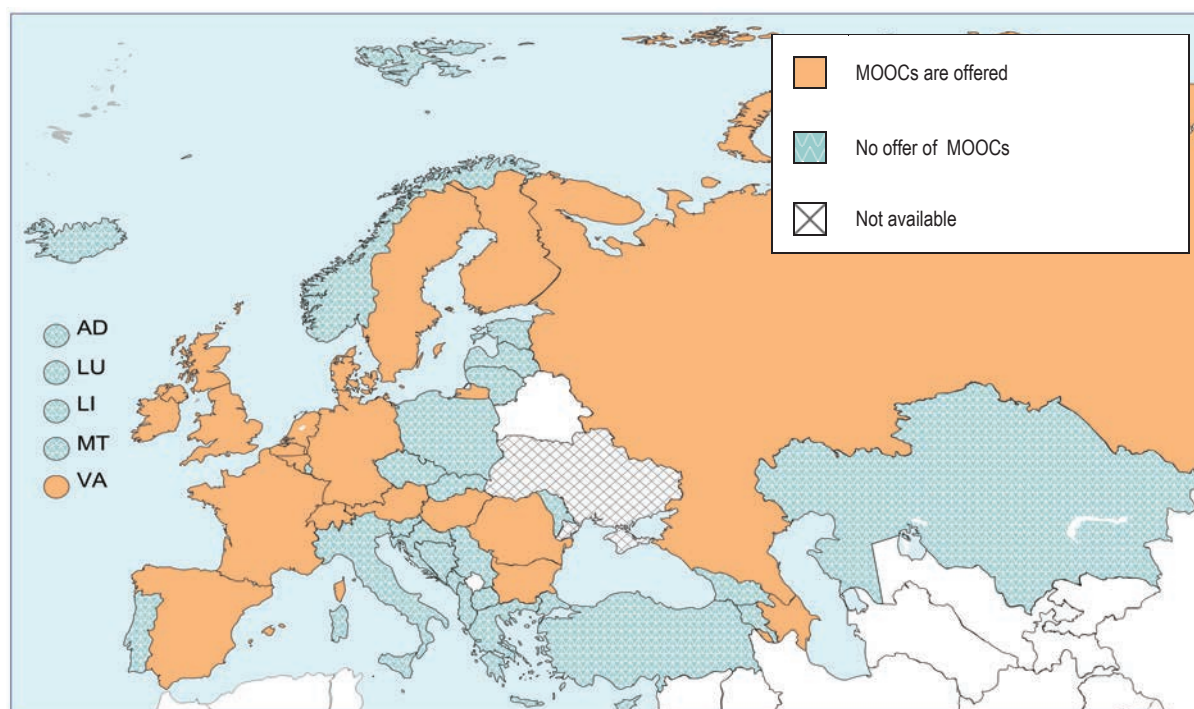
In the Bologna Process, 'virtual learning' has mostly been understood as enabling 'internationalisation at home', allowing non-mobile students to have an international experience through virtual mobility. However, since the 2012 Implementation Report there has been a growing interest in so-called 'massive open online courses' (MOOCs) outside Europe, which has forced European countries and higher education institutions to consider this 'new' internationalisation instrument to enhance their international visibility and competitiveness⁽¹³⁾. According to a recent study on e-learning in European higher education institutions, enhancing international visibility is by far the most common motivation for setting up MOOCs, followed by developing innovative learning and teaching methods (Gaebel et al. 2014, p.55).

MOOCs are courses intended to reach learners anywhere in the world via the internet. However, it is difficult to say precisely where the boundary lies between MOOCs and more 'traditional' online courses aimed at a more targeted or local public. As developments in this field are changing rapidly, such boundaries may become irrelevant in the near future.

Figure 7.8 shows where MOOCs are offered. Generally, in most countries, the share of higher education institutions offering MOOCs is very low and is rarely above 10 %. A notable exception is Spain where 30 % of institutions are offering MOOCs. In addition, in Ireland and the United Kingdom (Scotland), they are relatively common. Currently offered MOOCs are most numerous in Spain (over 200 courses) and the United Kingdom (over 150).

⁽¹³⁾ This was highlighted in the 2013 European Commission's Communication 'Opening up Education: Innovative teaching and learning for all through new Technologies and Open Educational Resources' (European Commission, 2013c).

Figure 7.8: Countries in which public higher education institutions offer MOOCs, 2013/14



Source: BFUG questionnaire

Overall, the use of internationalisation instruments such as joint programmes/degrees, campuses abroad and MOOCs varies in EHEA. There is clearly room for improvements and efforts could be made both at national and institutional level i to optimise the full potential of these internationalisation instruments.

7.1.3. Cooperation with different regions

The 2012 Bucharest Communiqué underlined that 'cooperation with other regions of the world and international openness are key factors to the development of the EHEA' ⁽¹⁴⁾. Various motivations can determine the choice of international partners and specific regions for collaboration. While countries may have specific foreign affairs or economic priorities, institutions can choose partners based on factors such as their academic and research profiles or personal connections.

Countries were asked to identify the main regions where they have specific internationalisation activities (or instruments), namely, international student mobility, joint programmes/degrees, or international cooperation in research and campuses abroad. The figures below show the results in percentages for each region ⁽¹⁵⁾. It is important to note that the answers gathered are countries' perceptions, and are not based on empirical evidence.

The EHEA appears to be the priority in cooperation for all four types of activities/instruments, with student mobility and the implementation of joint programmes/degrees being the most common. Also Asia and USA/Canada are important regions for cooperation for all types of activities.

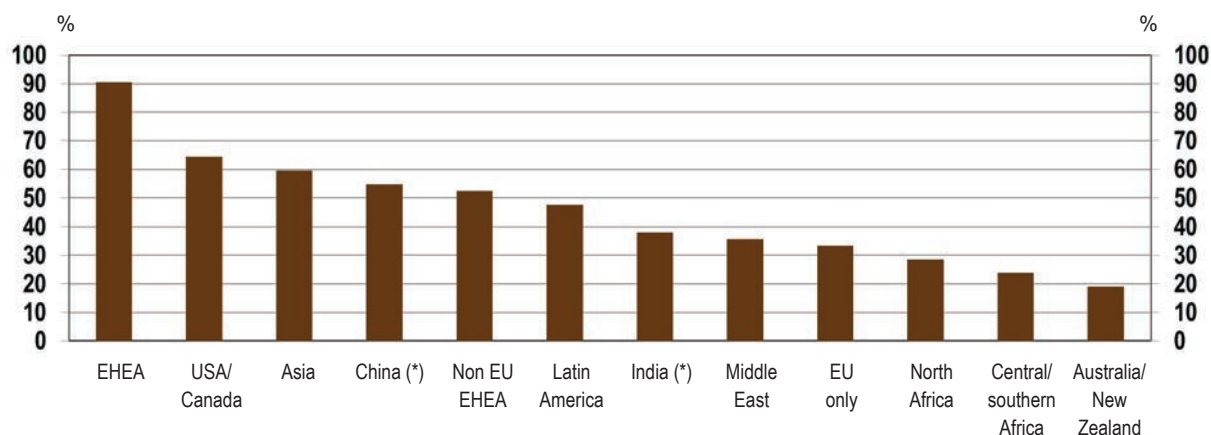
⁽¹⁴⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 4.

⁽¹⁵⁾ The United Kingdom (England, Wales, and Northern Ireland) does not collect information on these particular issues. Albania, Belgium (Flemish Community), Liechtenstein, Portugal and Slovakia have not provided any estimation, some of them stating that their higher education institutions have links across the globe.

Cooperation with different regions in student mobility

All higher education systems that provided data (42 systems) actually have identified the main regions of cooperation regarding international student mobility. The data (see Figure 7.9) show that EHEA countries prioritise the EHEA region (90 %), with some countries targeting neighbouring countries or a particular group of countries (e.g. Western Balkans, Nordic countries). The Erasmus mobility programme and initiatives such as Campus Europae ⁽¹⁶⁾, which facilitate mobility in Europe, probably contributes to this high share.

Figure 7.9: Countries' perceptions: Main regions of cooperation for international student mobility (Percentage of EHEA higher education systems where data is available), 2013/14



Source: BFUG questionnaire

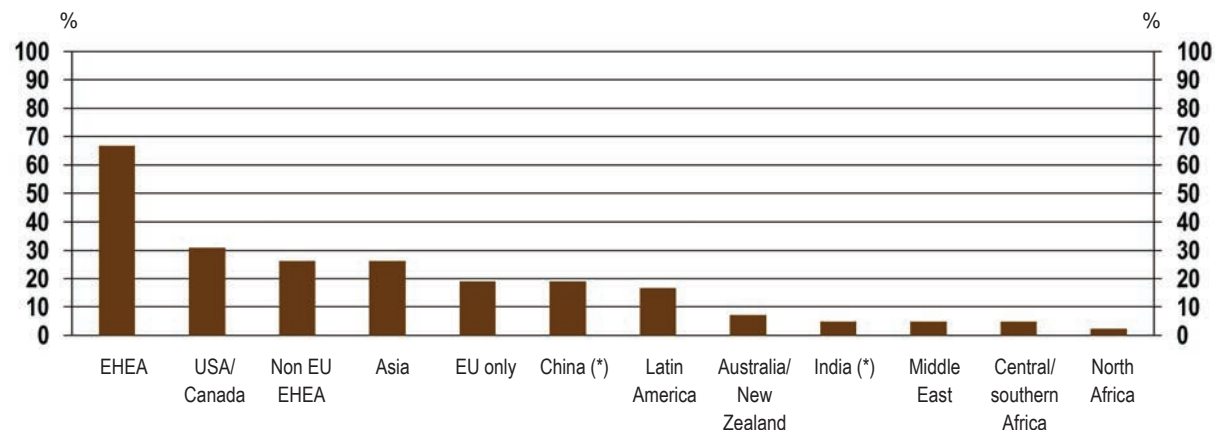
The EHEA region is followed by USA/Canada (64 %), Asia (60 %), China (55 %), 'non EU EHEA countries' (52 %) and Latin America (47 %). The Australia/New Zealand region stands at the end of the spectrum, but according to the 2013 European Strategy on internationalisation, the share of mobile students who choose to study in Australia and New Zealand is growing fast (European Commission 2013b, p.4).

⁽¹⁶⁾ Campus Europae regroups universities from different European countries. Since 2003, it has been organising high quality student exchange. See <http://www.campuseuropae.org/en/index.html>.

Cooperation with different regions in joint programmes/degrees

Over 75 % of higher education systems in EHEA for which data is available (33) were able to provide data on the main regions of cooperation regarding joint programmes and joint degrees (Figure 7.10).

Figure 7.10: Countries' perceptions: Main regions of cooperation for joint programmes/degrees (Percentage of EHEA higher education systems where data is available), 2013/14



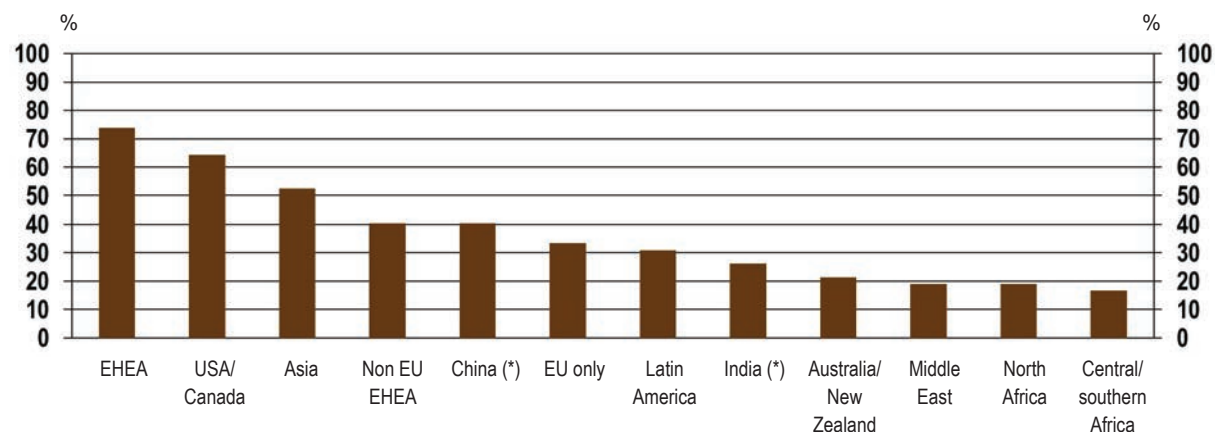
Source: BFUG questionnaire.

Estimations show that the EHEA region is the main region of cooperation (67 %). USA/Canada (31 %), Asia and 'non EU EHEA countries' (both 26 %), 'EU countries (19 %), China (19 %) and Latin America (16 %) are relatively far behind. The cooperation for joint programmes/degrees is quite rare with Australia/New Zealand, India, the Middle East and Africa

Cooperation with different regions in international cooperation in research

Growing interconnected networks among institutions and scholars have contributed to the internationalisation of research. Collaborations and partnerships are widespread across the world, making estimations of the main regions difficult. Nevertheless, more than 80 % of the EHEA higher education systems where estimations are available (36 systems) answered that they have main regions for cooperation in research (see Figure 7.11).

Figure 7.11: Countries' perceptions: Main regions of cooperation for international cooperation in research (Percentage of EHEA higher education systems where data is available), 2013/14



Source: BFUG questionnaire

Countries' perceptions suggest that the EHEA region and USA/Canada are the two first regions of cooperation (more than 60 %). These regions are followed by Asia (52 %) and by China and 'non EU EHEA countries' (both 40 %). India, Australia/New Zealand, the Middle East and Africa stand at the end of the spectrum, but they remain priority regions of activities for a number of EHEA countries.

For example, in Switzerland, the 2010 international strategy in the fields of education, research and innovation defined non-European priority countries for research cooperation (in addition to European partner countries), namely the BRICS (Brazil, Russia, India, China, South Africa), Japan and South Korea with which specific research programmes were initiated.

Cooperation with different regions in implementation of campuses abroad

Decisions about where to set up a campus abroad are made based on factors such as personal connections, research collaboration, partnerships resulting in a joint programme or a nation-to-nation relationship (Hénard, Diamond and Roseveare 2012, p.14). The implementation of campuses abroad is a rather limited internationalisation activity, the number of campuses abroad being usually limited to less than ten. Moreover, only 16 EHEA higher education systems were able to provide estimations on the main regions with which they cooperate.

According to data available, these systems seem to prioritise the EHEA region. Within the EHEA, neighbouring countries are sometimes prioritised. Outside EHEA, there are examples of foreign campuses in China (Denmark, Italy, Norway, United Kingdom), South Africa, Qatar, Thailand, Indonesia (the Netherlands), Singapore, Dubai and Malaysia (United Kingdom (Scotland)) and the USA (Spain and the United Kingdom (Scotland)). In the case of Germany, branch campuses and bi-national universities are located in a variety of countries (Egypt, Jordan, Oman, Turkey, China, South Korea, Vietnam, Singapore, Mongolia, Kazakhstan, Kyrgyzstan, Hungary and Bulgaria).

Cooperation with different regions in other internationalisation activities

Some countries mention other internationalisation activities, such as institutional capacity building of higher education institutions with developing countries (Finland, Holy See, the Netherlands and Norway) and cooperation through staff mobility. Regarding the latter, Belgium (French Community) has a specific grant programme prioritising Latin America, while the United Kingdom (Scotland) provides competitive funding for postdoctoral exchanges with key partner countries in Europe, North America, China and India. Staff mobility will be addressed in more details later section 7.2.5.

In conclusion, countries' perceptions suggest that there are imbalances regarding cooperation with different regions in higher education. However, commitments taken in the 2012 Mobility Strategy could contribute to change the current picture, as countries committed to intensifying structural collaboration with developing and emerging countries.

7.2. Mobility

International mobility is a core component of internationalisation and involves several key actors in higher education systems. It allows students to acquire valuable competences and skills needed to live and work in the global job market, while helping staff to gain new ideas, methods and skills and develop relations between institutions. Mobility also forces higher education institutions (both home and host institutions) to learn and adapt their management, services, administration procedures. It thus contributes to the internationalisation of higher education systems in ways that are interconnected and relatively complex.

The EHEA Mobility Strategy adopted in 2012 tackled several critical issues reflected in ten measures that should be implemented at institutional, national or European level by 2020, paving the way for

more high quality mobility exchanges and fewer obstacles across the continent. This section will address both student and staff mobility issues of target setting, obstacles to mobility, measures to tackle these obstacles and monitoring.

7.2.1. International student mobility and mobility targets

Specific terms have been developed to describe the different forms of student mobility. Firstly, **degree mobility**, the long-term form of mobility, is the physical crossing of a national border to enrol in a degree programme at tertiary-level in the country of destination. Students are enrolled as regular students in any semester/term of a degree programme taught in the country of destination, which is different from their country of origin ⁽¹⁷⁾ with the intention of graduating from the programme in the country of destination. **Credit mobility** is the short-term form of mobility. It is defined as temporary tertiary education and/or study-related traineeship abroad within the framework of enrolment in a tertiary education programme at a 'home institution' for the purpose of gaining academic credits (i.e. credits that will be recognised at the home institution). The most famous example of credit mobility is given by the Erasmus mobility programme, with over three million students having participated in the programme between its start in 1987 and the academic year 2012/13 (European Commission 2014b, p. 61). In 2012/13, almost 270 000 students studied or experienced a placement abroad through this programme.

There is also a distinction to be made regarding the direction of mobility flows. **Incoming mobility** takes the perspective of the country of destination – the country to which the student moves to study. Incoming mobility rate may be considered as an indicator of the country's attractiveness, relative to the size of its tertiary education system. **Outward mobility** takes the perspective of the country of origin – the country from which the student moves. While for many students this will be identical to the country of the student's nationality, it is more accurate to consider the country of permanent/prior residence or prior education for data collection purposes. The outward mobility rate may be considered as an indicator of a pro-active policy for students to acquire international experience (particularly for credit mobility). However, it may also be an indicator of possible insufficiencies in the education system of the country of origin (particularly for degree mobility).

The EHEA mobility target adopted in 2009 is a common benchmark set up at European level, which only describes outward mobility and taking into account the total number of graduates in the EHEA ⁽¹⁸⁾. Given that countries have different starting points and have diverse situations regarding mobility, the ministers agreed, through the Mobility Strategy, that countries should develop and implement their own internationalisation and mobility strategies with their own 'measurable and realistic mobility targets' ⁽¹⁹⁾.

Outward mobility targets

As Figure 7.12b shows, at national level, less than half of the countries (19 systems) have adopted (clear) national quantitative targets regarding outward degree or credit mobility ⁽²⁰⁾.

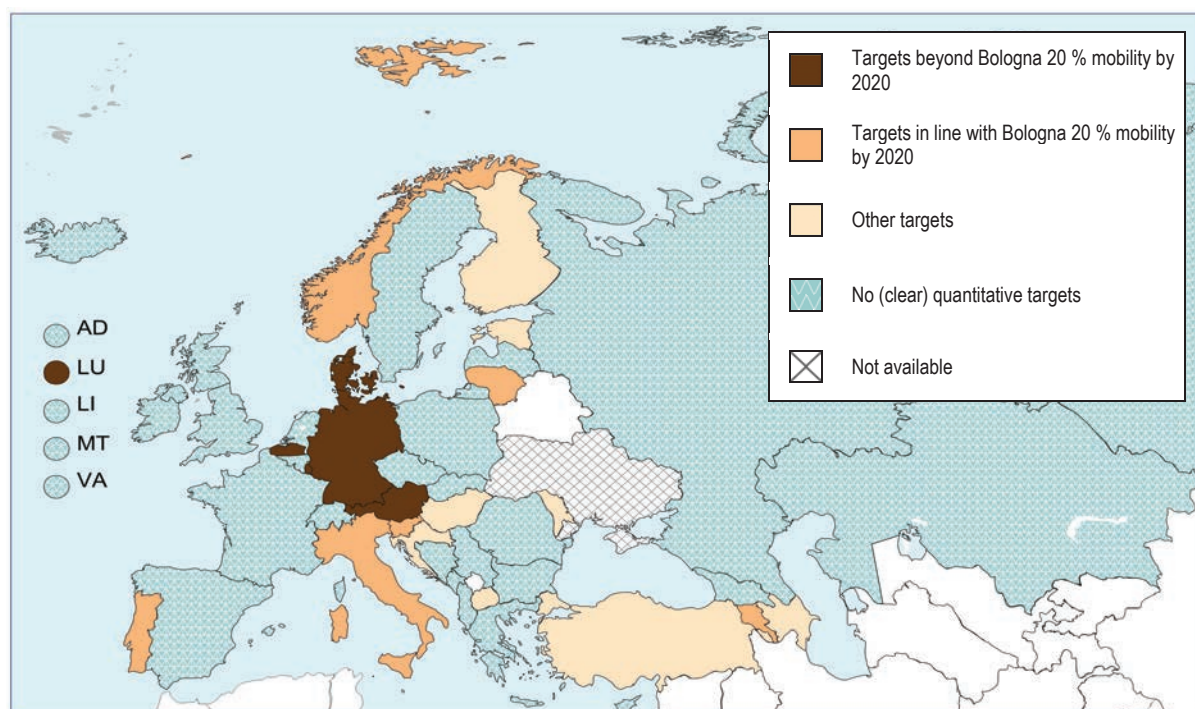
⁽¹⁷⁾ The country of origin is defined as the country of prior education i.e. the country where upper secondary diploma was obtained. If the information on country of upper secondary diploma is not available, the country of prior residence can be used as a proxy, as well as citizenship.

⁽¹⁸⁾ At least 20 % of those graduating in the EHEA should have had a study or training period abroad by 2020. The 2012 Mobility Strategy was more specific: 'We include in our mobility targets the periods spent abroad corresponding to at least 15 ECTS credit points or three months within any of the three cycles (credit mobility) as well as stays in which a degree is obtained abroad (degree mobility)'.

⁽¹⁹⁾ Mobility for Better Learning: Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012, p.1.

⁽²⁰⁾ Ideally, a 'clear target' should be either quantitative or qualitative and associated with a timeline or a year when the target should be reached.

Figure 7.12: Quantitative outward student mobility targets, 2013/14



Notes:

Outward targets include either degree-, credit- or both degree and credit mobility

Source: BFUG questionnaire

Armenia, Italy, Lithuania, Norway, Portugal and Slovenia have adopted national targets in line with the European one. Austria, Belgium (Flemish Community), Denmark, Germany and Luxembourg have adopted more ambitious targets for outward student mobility. Austria, Denmark and Germany have a 50 % target, while Belgium (Flemish Community) has a national target of 33 %. Luxembourg, a special case, has set a 100% target for the first cycle. It is currently achieved since all bachelor students must have a study experience abroad.

Azerbaijan, Finland, "The former Yugoslav Republic of Macedonia", Hungary, Moldova and Turkey have set targets in terms of numbers of students going abroad. For example, Hungary has a target of 20 000 outward credit mobility students by 2020.

Some countries have set a short-term target (e.g. 2015), such as Finland and Estonia. In Estonia, the internationalisation strategy specifies that by 2015 all doctoral students should have spent at least one semester in a foreign university.

Generally, targets have been defined for credit mobility only (short-term form of mobility). Only Armenia, Azerbaijan, Germany and Moldova have quantitative targets for outward degree mobility. This could be explained by preferring outward credit mobility over outward degree mobility. Indeed, outward credit mobility means students spend a short period abroad and typically return to the home institution to finish the programme. This form of mobility might not be perceived as generating a loss of revenues for national institutions or a potential brain drain. Conversely, outward degree mobility means students leaving the country to acquire a degree and might be associated with a loss of revenues and/or a potential brain drain. However, outward degree mobility is not necessarily always associated with these disadvantages. Indeed, in a long-term perspective, this type of mobility can bring benefits, such as close relations with other countries and better preparation of graduates for the European and global market place. Moreover, in many cases, former mobile students return to their countries after a long period spent abroad, contributing positively in society. The challenge for national

authorities is to create the conditions to attract graduates back to their home countries after their studies abroad.

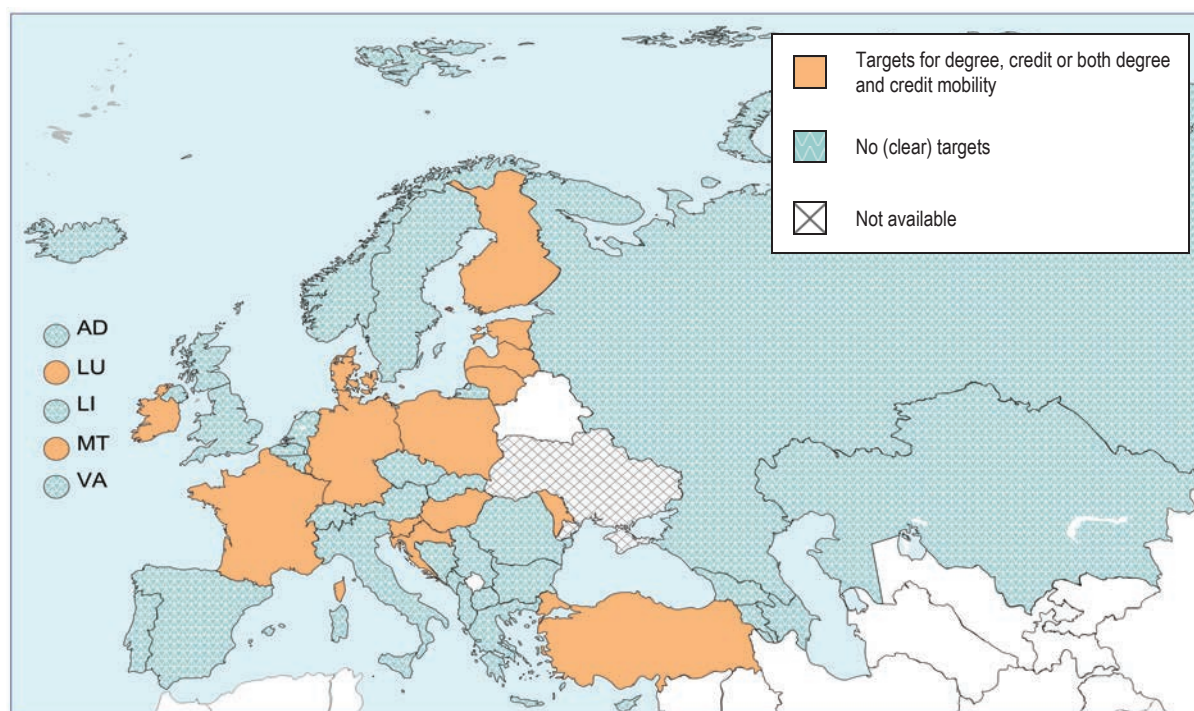
Finally, Poland has a qualitative target for outward student mobility and it is embedded in its Strategy of the Development of Human Capital 2020. It aims to increase the rate of Polish students having had international experience of at least three months duration.

In Russia, where the student population is massive, there are no national targets, but student mobility is encouraged. However, few students are going abroad (see Figure 7.16 and 7.17). This is also the case of some of Russia's neighbouring countries in the EHEA.

Incoming mobility targets

Figure 7.13 shows that only a minority of countries have defined clear national quantitative targets for incoming mobility. The fact that incoming credit mobility might be seen as a normal outcome of outgoing credit mobility could explain the low rate of countries with targets. However, it is more surprising that the vast majority of countries have no targets regarding incoming degree mobility. Indeed, this form of mobility might be perceived favourably as it might entail potential benefits for the national economy through an influx of highly skilled people. The fact that few countries have adopted internationalisation strategies may explain the current situation.

Figure 7.13: Quantitative incoming student mobility targets, 2013/14



Source: BFUG questionnaire

Poland is an example of country with a target for incoming student mobility, 5 % by 2020 for credit and degree mobility (an increase from 1.4 % in 2011). Malta has the objective of attracting 5 000 degree mobile students by 2020 (fee paying students), while Ireland's International Education Strategy 2010-15 aims to increase total number of international student numbers (including full-time, part-time, and exchange) in higher education institutions to 38 000, an increase of over 12 000 or 50% compared to 2010. A small number of countries focus on the share of doctoral students in third cycle programmes (Estonia, Finland and France). In Estonia and Finland, the share of international doctoral candidates by 2015 should be 10 % and 20 % respectively. In France, 14 % of the total number of foreign students should be doctorate candidates by 2015.

Within incoming students, a target on incoming mobility of students from outside the EHEA into the EHEA was discussed within the Working Group on Mobility and Internationalisation. It appeared that setting a target at EHEA level would be difficult because of the diversity of higher education systems. Countries are thus encouraged to adopt their own national targets for incoming students from outside the EHEA.

Countries were asked whether they have defined targets for incoming international students with a first degree obtained outside the EHEA. No country reported any clear targets on this particular topic, so it may be more a function delegated to institutional level.

Other targets

Some countries have defined other targets related to the internationalisation of higher education, such as percentages of mobile academic staff or international partnerships. Target setting regarding staff mobility will be further developed later in section 7.2.5. Regarding international partnerships, for example in Denmark, the percentage of cooperation agreements on joint programmes between international and Danish educational institutions should increase by 20 % by 2020, compared to 50 agreements for joint programmes in 2012. In France, where the share of foreign doctoral candidates is about 40 %, the target concerns the annual numbers of foreign doctoral candidates registered in a « *co-tutelle* » or in joint international supervisions of thesis. There should be 2000 in 2015 according to the target defined by the 2014 annual performance plan compared to 1695 in 2013. Finally, in Slovenia, at least one fifth of doctoral students should study in joint programmes by 2020.

Denmark has set other specific targets, such as the number of students spending short periods abroad in high growth countries or in non-English speaking European countries. For example, by 2020, the number of Danish students studying abroad or taking an internship in high growth countries like Brazil, China, India, Mexico and South Korea should increase by at least 15 % annually (563 students in 2011). In addition, the number of students spending short periods abroad in non-English speaking European countries should also increase by a minimum of 15 % annually from 2 167 students in 2011.

Overall, only a few countries have defined national quantitative mobility targets for outward or incoming student mobility. It is thus difficult to monitor progress and this is clearly an area where further action is needed.

7.2.2. Student mobility flows

This section provides data and analysis on student mobility flows, building on indicators available in the 2012 implementation report, but also using new indicators, especially on the mobility balance. Since comprehensive data on credit mobility is not yet available – apart from the data collected by the Erasmus mobility programme - this section will present information on degree mobility only. However, extensive data on credit mobility is currently in the process of being collected in the EU framework and it should be made available in 2015. Data will no longer be restricted to credit mobility within the Erasmus and other European programmes, but will also encompass other national programmes and study-related activities (e.g. internships/work placements, language courses, etc.).

For this reporting exercise, three main student mobility flows will be analysed: degree mobility flows from outside the EHEA to the EHEA; degree mobility flows from inside the EHEA to outside the EHEA and, finally, degree mobility flows within the EHEA.

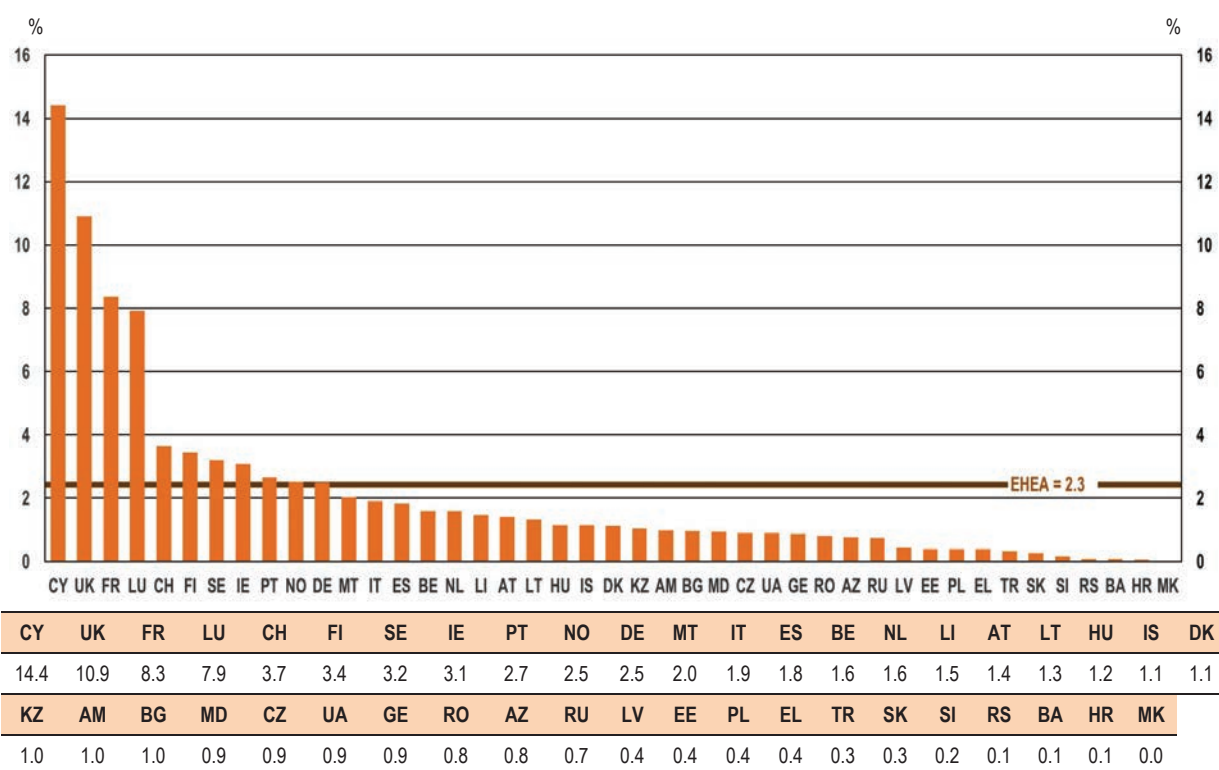
Inward degree mobility flows from outside the EHEA to the EHEA

Figure 7.14 shows mobile students coming from outside EHEA to individual EHEA countries. It compares the number of students from outside the EHEA coming into the country with the total

student population in the country concerned (see Chapter 1 for student population). The value of the indicators thus depends on the relative size of the hosting tertiary education system and on the mobility patterns of domestic students. Hence, two higher education systems attracting the same number of students from outside the EHEA but sending out different flows of students abroad will display different incoming mobility rate from outside EHEA.

It should be underlined that for some countries, foreign citizenship/nationality is used as a proxy for actual mobile students, as data on genuine mobility is not available. The main problem with using citizenship in this way is that it conflates genuine mobile students with those who may have moved to the destination country earlier, for example during school education. Although this affects less than a third of the countries in figures 7.14 and 7.15, it nevertheless makes the statistics less accurate in terms of measuring mobility flows.

Figure 7.14: Incoming degree mobility rate – tertiary education mobile students from outside the EHEA as a percentage of the total number of students enrolled, by country of destination, 2011/12



Notes:

EHEA is the EHEA weighted average. Missing data is not included. Czech Republic, Greece, France, Italy, Finland, Norway, "The former Yugoslav Republic of Macedonia", Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Georgia, Ukraine: ISCED 5

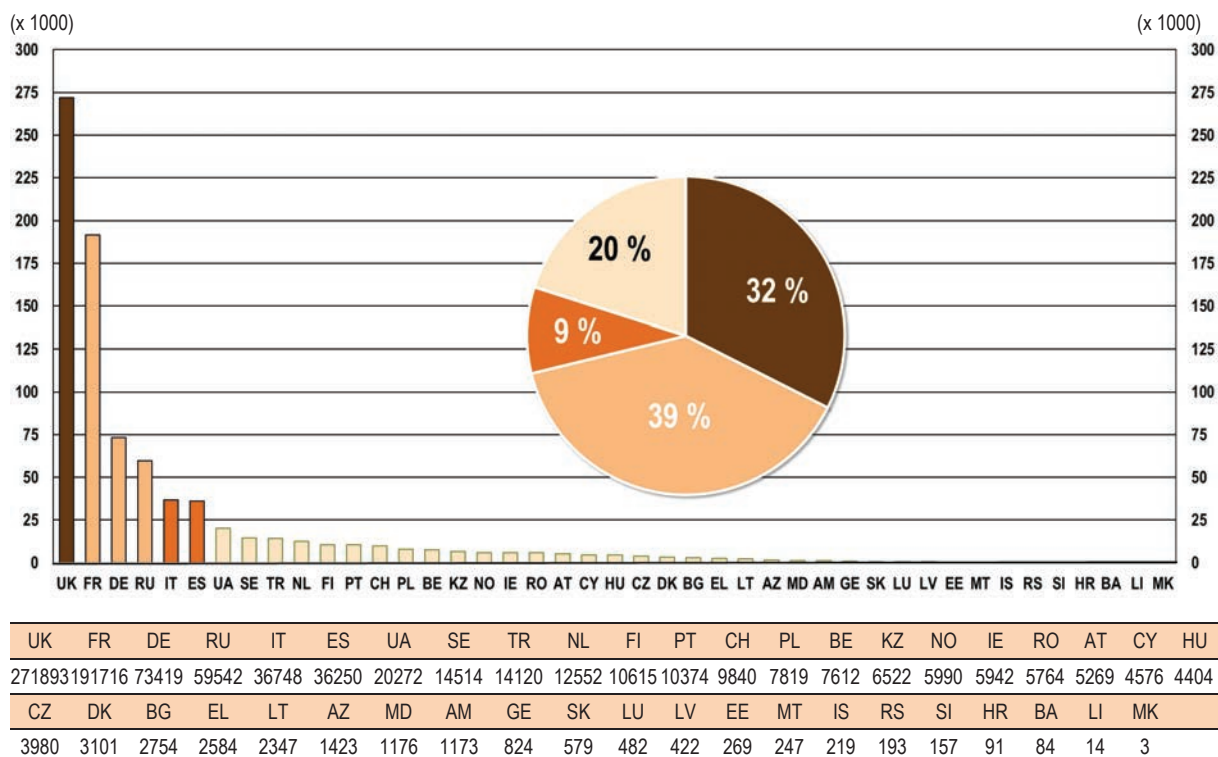
Russia: estimate

Source: Eurostat, UOE and additional collection for the other EHEA countries.

Students from outside the EHEA make up for more than 5 % of the total student population in only four countries, namely Cyprus, the United Kingdom, France and Luxembourg. At the other end of the spectrum, in 18 countries less than 1 % of students come from outside the EHEA. The weighted average of all EHEA countries is 2.27 % compared to 2.25 % in 2008/09.

Figure 7.15 gives complementary information to the previous figure, showing the number of incoming mobile students. Four countries, namely the United Kingdom, France, Germany and Russia, attract 71.3 % of all non-EHEA mobile students enrolled in the EHEA.

Figure 7.15: Number of incoming degree tertiary education mobile students from outside the EHEA, by country of destination, 2011/12



Notes:

Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Germany: ISCED 5A only. *Bildungsausländer* only, i.e. foreign students that gained their higher education entrance qualification abroad

Georgia, Ukraine: ISCED 5

Russia: estimate

Source: Eurostat, UOE and additional collection for the other EHEA countries.

The United Kingdom, with more than 270 000 incoming degree students, attracts the largest share of mobile students from outside the EHEA (32.5 %). France is second with slightly more than 191 000 students (accounting for nearly 23 % of the total inflow from outside the EHEA). Germany and Russia have far lower shares of the inflow (8.8 % and 7.1 % respectively). In these countries, students from outside the EHEA account for 2.5 % and 0.7 % of the total population of enrolled students (see Figure 7.14). Since the last collection of data in 2008/09, the number of incoming degrees students from outside the EHEA has increased for the United Kingdom and France, but has decreased for Germany and Russia. Italy and Spain both host around 36 000 students from outside the EHEA which represents 1.9 % and 1.8 % of their total population of students. Numbers have increased in both cases compared to 2008/09.

The remaining EHEA countries host altogether around 168 000 students from outside the EHEA. It is four times less than the total registered by the top six countries.

Outward degree mobility flows from inside the EHEA to outside the EHEA

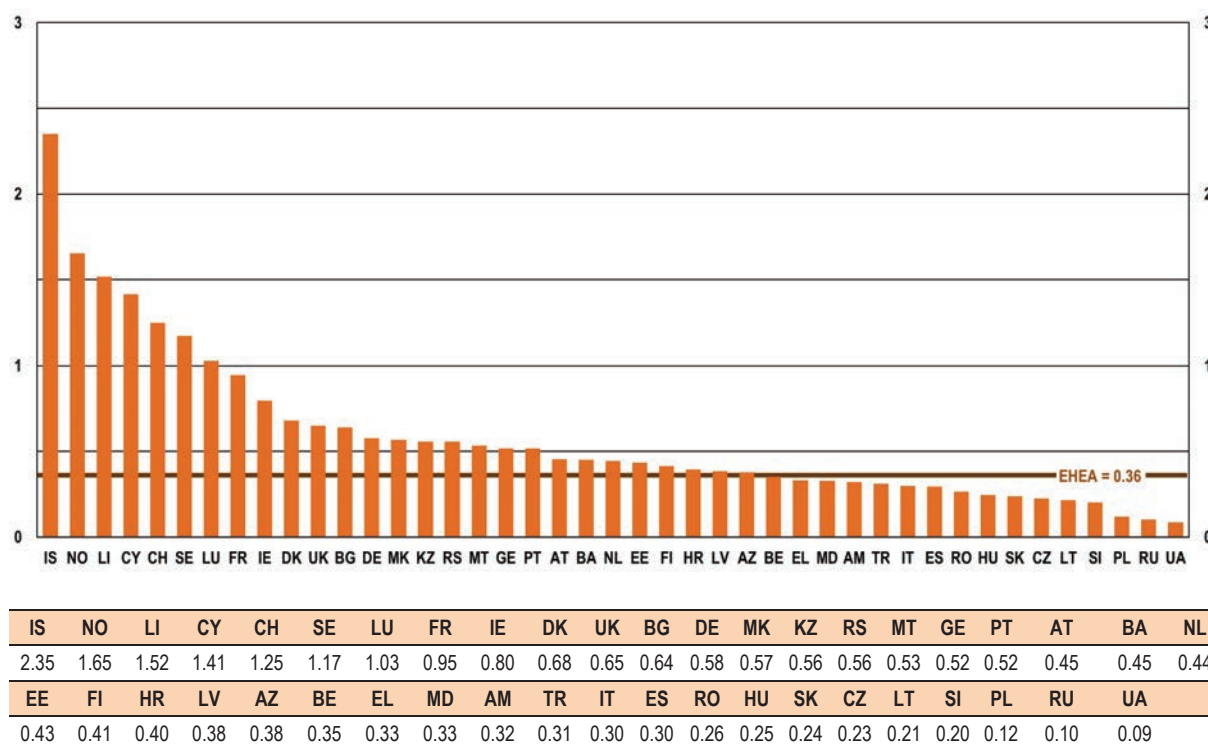
The outward degree mobility rate of a country shows mobile students enrolled abroad, as a percentage of the total number of students from that country (i.e. the total number of students having the same country of origin). For a given country (of origin), the compilation of outward mobile students relies on the records of all other countries in the world. Indeed, only each hosting country can collect data on students from this country of origin in its own tertiary education system.

Thus, students from a given country of origin are recorded through the mobility data provided by the host countries. To obtain a comprehensive and reliable picture of outward mobility flows across the world, all countries would need to compile data from their tertiary education system and use the same mobility criterion (e.g. prior education or usual residence). However, this is far from being the case at the moment.

Currently, the reliability of outward mobility data is limited by two issues. First, the availability of data in the countries covered and the number of countries covered is limited. Data used here includes the mobility data from the EHEA (excluding the following missing countries: Albania, Andorra, Holy See and Montenegro) and a selection of non-EHEA countries: Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States.. Nevertheless, the list of non-EHEA countries has been extended in comparison to the 2012 Bologna Implementation Report. Second, whenever provided, mobility data may rely on different criteria (i.e. citizenship, prior/permanent residence, prior education), which do not measure exactly the same phenomenon.

In 2011/12, the outward degree mobility rate is the highest in Iceland, about 2 % (see Figure 7.16), followed by Norway, Liechtenstein, Cyprus, Switzerland, Sweden, and Luxembourg, with the rate ranging from 1 % to 1.7 %. These rates are far higher than the weighted average of all EHEA countries (0.36 %).

Figure 7.16: Outward degree mobility rate – tertiary education students studying abroad outside the EHEA as a percentage of the total number of students of the same country of origin, 2011/12



Notes:

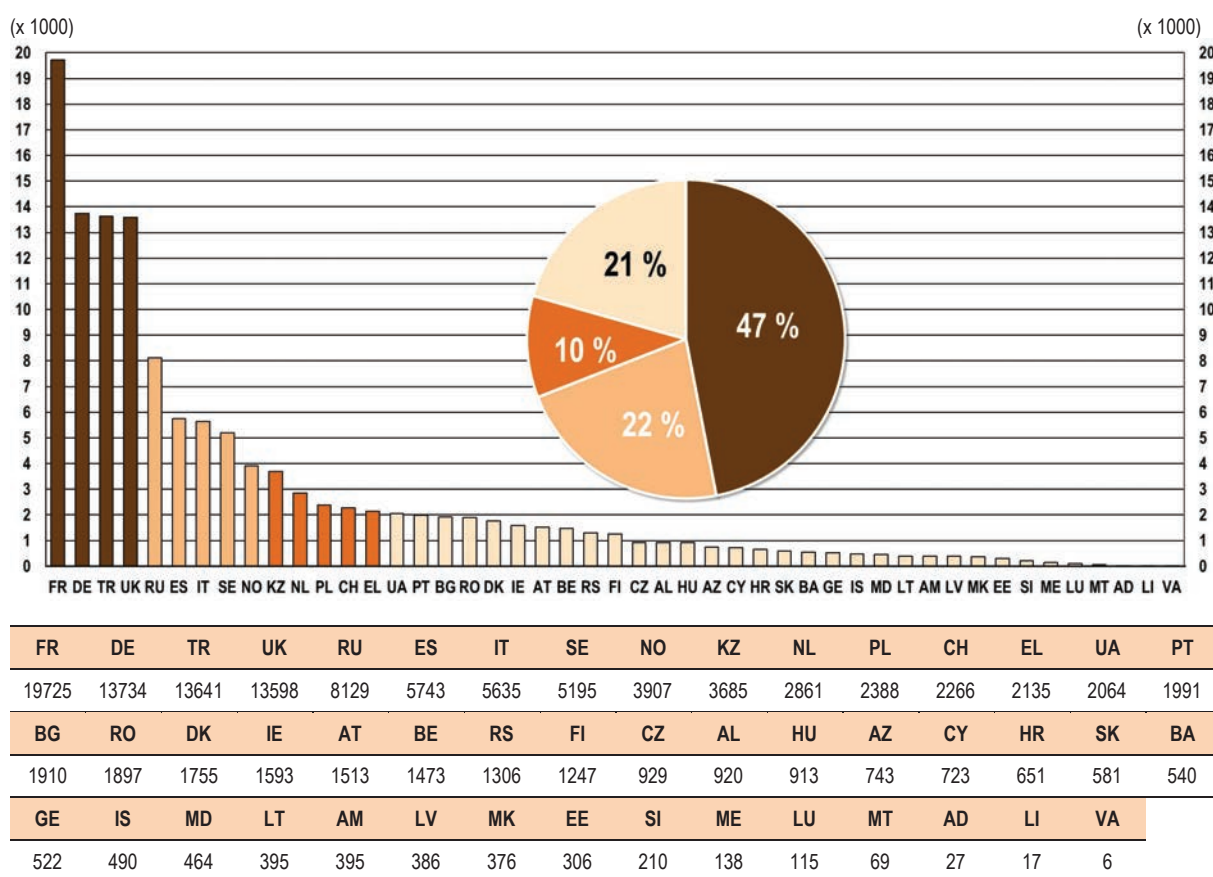
Destinations outside of the EHEA considered are Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States. Data refer to foreign students instead of mobile students for the following country of destination: Japan. Czech Republic, Greece, France, Italy, Finland, Norway, "The former Yugoslav Republic of Macedonia", Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students. EHEA is the EHEA weighted average.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

The fact that there are several countries with a small population (e.g. Iceland, Liechtenstein, etc.) at the top end of the outward degree mobility scale suggests that country size plays a role. Indeed it is likely that the high outward mobility rate of these countries is caused by, for example, the lack of programmes in some study fields.

The distribution of outward degree students from the EHEA to non-EHEA countries listed above is very imbalanced (see Figure 7.17). In 2012, the students originating from four countries (France, Germany, Turkey and the United Kingdom) account for nearly half (46.9 %) of all outward mobile students from the EHEA, ranging from around 13 600 students (United Kingdom and Turkey) to about 19 725 students (France) to the non-EHEA countries mentioned above. It should be borne in mind that such results depend largely on the selection of non-EHEA countries which is governed by current data availability.

Figure 7.17: Number of outward degree tertiary education mobile students studying outside the EHEA, 2011/12



Notes:

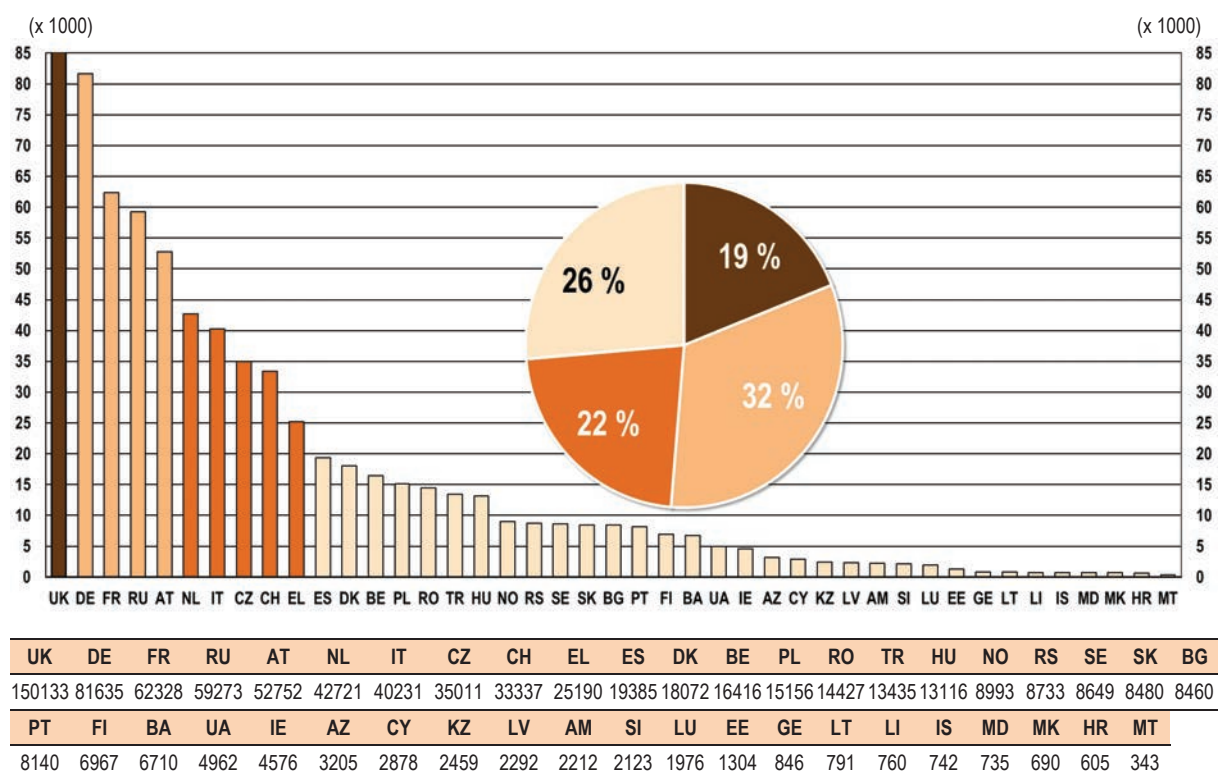
Destinations outside of the EHEA considered are Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States.. Data refer to foreign students instead of mobile students for the following country of destination: Japan.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

A second group of countries accounts for 22.1 % of all outward mobile students from the EHEA going to non-EHEA countries. These countries send less than 10 000 students (from around 3900 students from Norway to 8129 students from Russia). It is remarkable that the number of outgoing students to non-EHEA countries is very limited for more than two-third of the EHEA countries, sending less than 2 000 students each (and even less than 500 students for nearly half of the countries of this group).

The data show that inward and outward degree mobility flows with non-EHEA countries are rather limited compared to the total numbers of students enrolled in higher education. They are also imbalanced in terms of country of destination and country of origin. That said, it is worth recalling that

Figure 7.19: Number of incoming degree tertiary education mobile students from the EHEA, by country of destination, 2011/12



Notes:

Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Georgia, Ukraine: ISCED 5.

Russia: estimate.

Source: Eurostat, UOE and additional collection for the other EHEA countries.

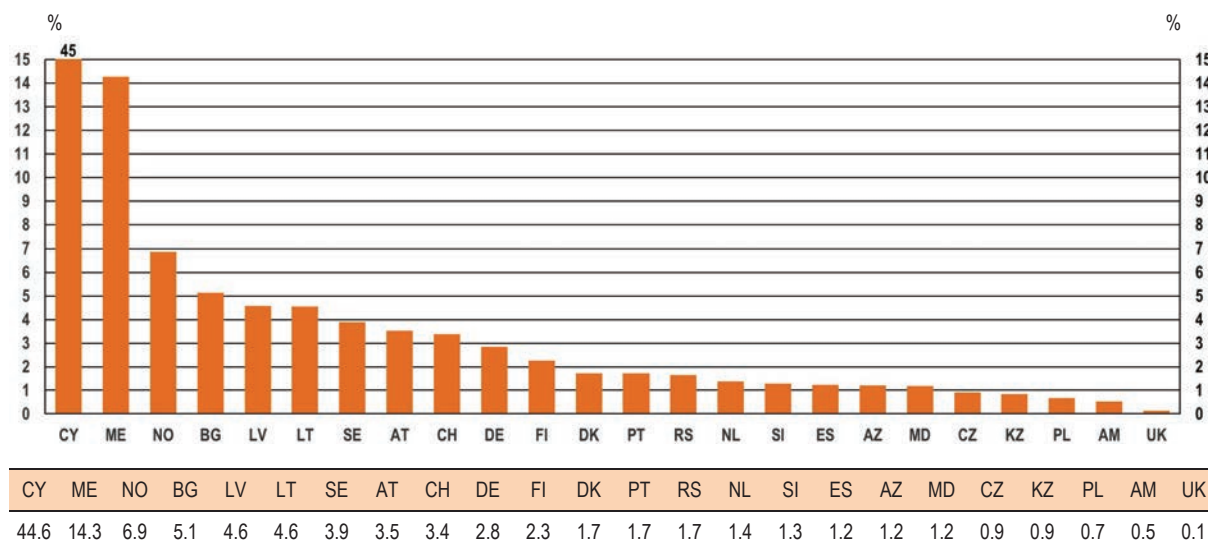
Overall, the Netherlands, Italy, Czech Republic, Switzerland and Greece host 22.3 % of incoming students from the EHEA. The Netherlands hosted 19 081 students from the EHEA in 2008/09, while it hosted more than 40 000 in 2011/12.

Similarly to the previous report, incoming degree mobility flows represent a low share compared to the tertiary student population. The average rate of incoming degree mobile students (from EHEA and non-EHEA countries) reaches 4.4 % of total enrolments (Figures 7.14 and 7.18). However, it has slightly increased since 2008/09 where it reached 4%. However, only systematic and regular analysis of the mobility flows on a long-term basis will allow assessing the trends.

Outward mobility flows within the EHEA

Figure 7.20 shows graduates who have graduated abroad in another EHEA country as a percentage of the total number of graduates of the same country of origin. According to the current state of data collection systems across the EHEA, this figure should be interpreted with extreme caution due to the low country coverage of only 24 countries.

Figure 7.20: Outward degree mobility rate – mobile tertiary education graduates within the EHEA as a percentage of all graduates of the same country of origin, by country of origin, 2011/12

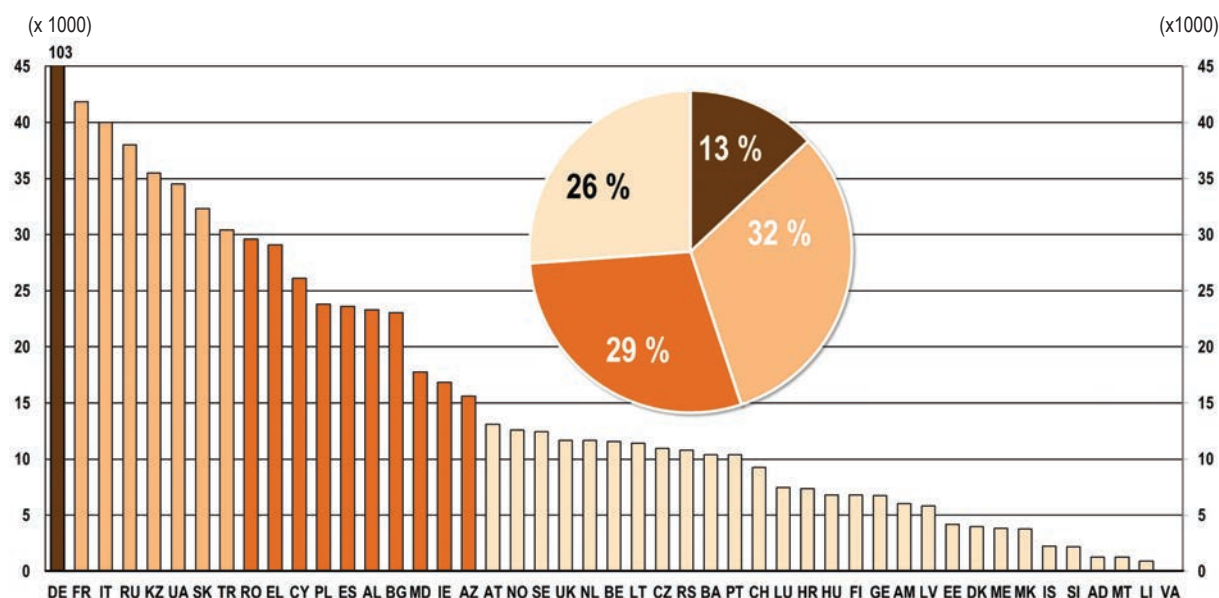


Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Cyprus, with an outward degree mobility rate of graduates of around 44 %, followed by Montenegro, Norway and Bulgaria with mobility rates between 5.1 % and 14.3 % display the highest values. The mobility rate for the majority of EHEA countries for which data is available is under 5 %.

Figure 7.21 presents the number of outward degree mobile students within the EHEA. Similarly to the 2008/09 data, it shows that Germany sends the highest number of students for a degree in another EHEA country. Indeed, nearly 102 800 students (76 717 in 2008/09) move from Germany to study in another EHEA country, representing 13 % of the total number of EHEA students being abroad within the EHEA.

Figure 7.21: Number of outward degree tertiary education mobile EHEA students within the EHEA, by country of destination, 2011/12



DE	FR	IT	RU	KZ	UA	SK	TR	RO	EL	CY	PL	ES	AL	BG	MD
102798	41852	39993	37985	35480	34527	32341	30407	29609	29113	26112	23804	23630	23285	23063	17759
IE	AZ	AT	NO	SE	UK	NL	BE	LT	CZ	RS	BA	PT	CH	LU	HR
16863	15630	13124	12590	12416	11683	11673	11549	11437	10972	10790	10411	10366	9261	7457	7381
HU	FI	GE	AM	LV	EE	DK	ME	MK	IS	SI	AD	MT	LI	VA	
6818	6798	6728	6014	5846	4180	3957	3834	3787	2241	2188	1284	1276	917	20	

Notes:

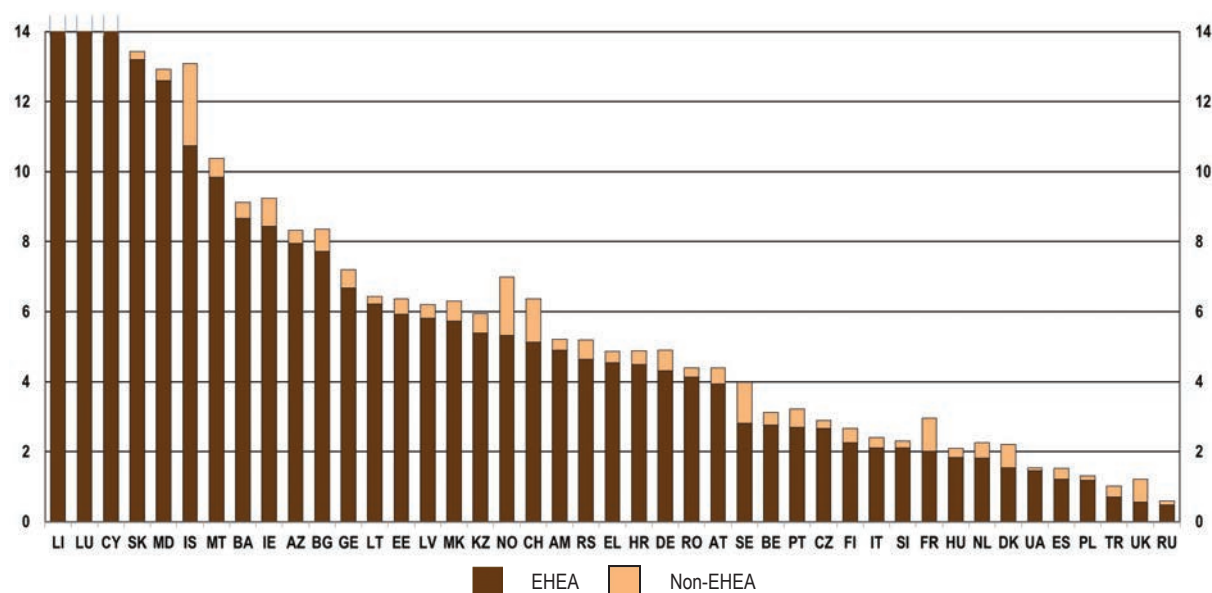
Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students. Excluding Montenegro, Albania, Andorra and the Holy See.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Far behind Germany, a group of seven countries send more than 30 000 students across the EHEA, ranging from 30 000 from Turkey to 40 000 from France and Italy. At the other end of the spectrum, around 60 % of EHEA countries send individually less than 14 000 students to other EHEA countries.

Figure 7.22 shows the share of tertiary students enrolled for a degree abroad, distinguishing between the EHEA and non-EHEA countries. It links the outward mobile students of a country to the total population of students with the same country of origin. It thus measures mobility of a population that has the same country of origin (i.e. the same prior education or the same usual residence or the same citizenship). As mentioned above, the results provided by this figure should be considered with caution since countries do not all use the same criterion to define the mobile population. For instance, the fact that some citizens of the United Kingdom permanently live in countries of the Commonwealth could lead to an over-estimation of outward flows if these countries use the citizenship criterion to report enrolment by country of origin.

Figure 7.22: Share of tertiary students enrolled abroad (degree mobility), by country of origin, 2011/12



	LI	LU	CY	SK	MD	IS	MT	BA	IE	AZ	BG	GE	LT	EE	LV	MK	KZ	NO	CH	AM	RS
EHEA	81.9	66.6	51.0	13.2	12.6	10.7	9.8	8.7	8.4	8.0	7.7	6.7	6.2	5.9	5.8	5.7	5.4	5.3	5.1	4.9	4.6
non-EHEA	1.5	1.0	1.4	0.2	0.3	2.3	0.5	0.4	0.8	0.4	0.6	0.5	0.2	0.4	0.4	0.6	0.6	1.7	1.3	0.3	0.6
	DE	RO	AT	SE	BE	PT	CZ	FI	IT	SI	FR	HU	NL	DK	UA	ES	PL	TR	UK	RU	
EHEA	4.3	4.1	3.9	2.8	2.8	2.7	2.7	2.3	2.1	2.1	2.0	1.8	1.8	1.5	1.4	1.2	1.2	0.7	0.6	0.5	
non-EHEA	0.6	0.3	0.5	1.2	0.4	0.5	0.2	0.4	0.3	0.2	0.9	0.2	0.4	0.7	0.1	0.3	0.1	0.3	0.6	0.1	

Notes:

Destination outside of the EHEA considered are: Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States. Japan: data refer to foreign students instead of mobile students. Excluding Montenegro, Albania, Andorra and the Holy See. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Georgia, Russia: Estimate.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Three countries have a specific profile in the EHEA, namely, Liechtenstein, Luxembourg and Cyprus. They present a particularly high outgoing degree mobility rate: there are more students studying abroad than in their own country. This phenomenon may be explained by a limited provision of programs for some fields of study as well as the small size of the country.

Apart from these countries, Slovakia, Moldova and Iceland are the only countries with at least 10 % of students enrolled abroad in the EHEA. Three countries have less than 1.2 % of student population enrolled abroad (Turkey, United Kingdom and Russia).

Figure 7.22 also shows that the EHEA students have a preference for undertaking studies – degree mobility – in the EHEA rather than in other parts of the world (being understood here as Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States). This is true for most of the EHEA countries with some exceptions, where mobility outside the EHEA is a significant part of the overall mobility. The United Kingdom has the most balanced situation, as mobility outside the EHEA is practically equivalent than mobility within the EHEA. Mobility outside the EHEA is also a strong component of the overall mobility of students (more than 20% of the overall mobility) originating from France, Turkey, the Nordic countries (except Finland), Spain, Switzerland, the Netherlands and Russia. In all other countries, mobility outside the EHEA accounts for less than 18 % of the overall mobility.

Balanced vs. imbalanced mobility

The aspiration for more balanced mobility was reinforced in the Bucharest Communiqué and the 2012 Mobility Strategy, in which ministers asked for more balanced mobility (especially for degree mobility), 'since it has a sustained effect on the host and home countries, can facilitate capacity building and cooperation and may lead to brain gain on the one side and to brain drain on the other' ⁽²¹⁾. That being said, it may be worth pointing out that there is no definition of 'balanced mobility' at European level ⁽²²⁾.

Data collected for this reporting exercise allows assessing the balance (or the imbalance) of mobility flows both quantitatively and qualitatively.

Balanced mobility hides different realities and does not necessarily reflect a positive situation. For example, assuming that mobility is desirable, balanced mobility at low levels of mobility (low incoming and low outward mobility rates) may be perceived less positive than balanced mobility at high levels (high incoming and high outward mobility rates). Balanced or imbalanced mobility may also hide geographical disparities, as only two areas are considered: the EHEA (see Figure 7.23) and the group of non-EHEA countries (see Figure 7.24).

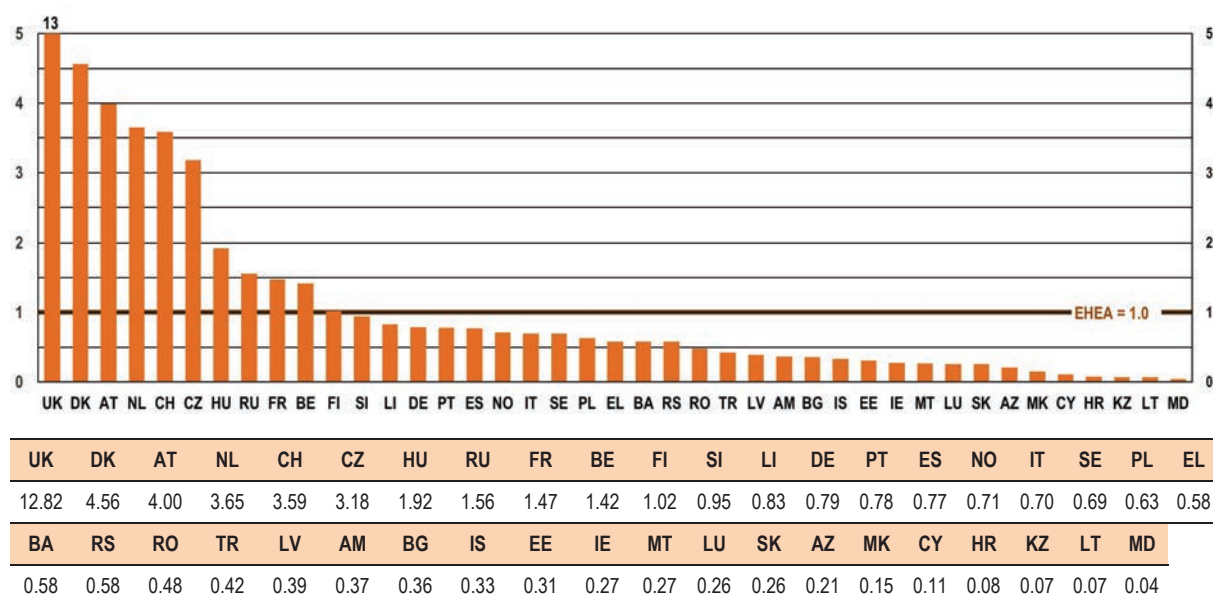
⁽²¹⁾ Mobility for Better Learning. Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012, p. 2.

⁽²²⁾ The Working Group on Mobility (2009-2012) tried to elaborate an appropriate definition of 'balanced mobility' without reaching a final conclusion. Nevertheless, several main ideas were put forward, such as: 'Even if there are specific imbalances, mobility itself is good and therefore should not be restrained' and 'Only awareness and capacity building in the home countries can sustainably reduce brain drain'.

Figure 7.23 and 7.24 aim to identify ‘net importing countries’ (ratio greater than 1 – the country receives more mobile students than it sends), ‘net exporting countries’ (ratio below 1 – the country sends abroad more students than it hosts) and countries experiencing balanced mobility (ratio equal to 1).

Figure 7.23 show that most EHEA countries (30 countries out of 41 for which data is available) are net exporters of students towards other EHEA countries (ratio below 1 – more outgoing than incoming students). Only Finland shows a balanced mobility with the rest of EHEA countries (ratio equal to 1), while 10 countries are net importers of students with the rest of the EHEA (ratio above 1 – more incoming than outgoing students). These net importers, mostly Western European countries, are the United Kingdom, Denmark, Austria, the Netherlands, Switzerland, the Czech Republic, Hungary, Russia, France and Belgium.

Figure 7.23 : Mobility balance: incoming/outgoing tertiary students ratio within the EHEA, 2011/12



Notes:

EHEA is the EHEA weighted average. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Russia, Serbia, Azerbaijan, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students. Excluding Montenegro, Albania, Andorra and the Holy See.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Figure 7.24 aims to show whether the situation changes when mobility outside the EHEA (selected countries) is also taken into account. It seems that the picture remains relatively similar. The same 10 countries remain net importers, although the ratios are lower (i.e. these countries are experiencing a more balanced mobility when non-EHEA countries are taken into account (ratio closer to 1.0)).

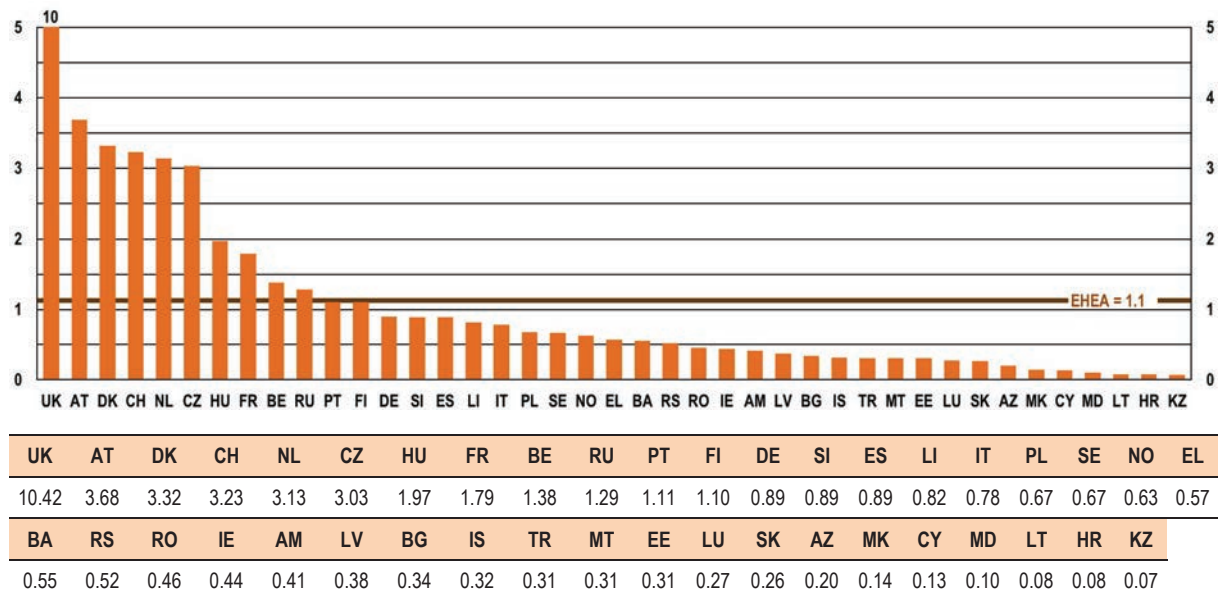
Finland that had a balanced mobility with EHEA partners shows a slight imbalance when non-EHEA countries are taken into account.

Again, the incoming/outgoing ratio outside the EHEA (Figure 7.24) suffers from an under-coverage as only a selection of countries ⁽²³⁾ is considered as non-EHEA countries. This under-coverage has a differentiated impact on countries. As previously said, it is expected that countries that established privileged links with some areas of the world because of shared languages (English-speaking area,

⁽²³⁾ Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States

francophone community, etc.), common history (Commonwealth, former colonies, etc.) or specific regional agreements are more impacted by the geographical under-coverage of the data.

Figure 7.24 : Mobility balance: incoming/outgoing tertiary students ratio within and outside the EHEA, 2011/12



Notes :

EHEA is the EHEA weighted average. Destination outside of the EHEA considered are: Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States.. Excluding Montenegro, Albania, Andorra and the Holy See. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Specific bilateral imbalances

There are significant imbalances ⁽²⁴⁾ between particular countries. For example, the United Kingdom is a net importing country with all the EHEA countries, but the imbalance is especially high with Ireland, Greece, Germany and Cyprus. Each of these countries sends far more students (a surplus of more than 10 000 students) to the United Kingdom than they receive from it. Austria is also a net importing country especially from Germany, Italy, Turkey and numerous eastern European countries, but is a net exporting country in its relation with the United Kingdom. Germany displays large imbalanced mobility with several EHEA countries. In addition to Austria and the United Kingdom, Germany sends far more students to the Netherlands, Switzerland and France than it receives from them.

Students from Spain, Poland, Russia, Turkey and Ukraine hosted in Germany largely outnumber German students enrolled in these countries (the net incoming balance exceeds 3 000 students). France also shows imbalanced bilateral mobility with several countries. On the one hand, French students enrolled in Belgium and Switzerland exceed the number of incoming students from these countries. On the other hand, the French tertiary education system hosts far more students from Germany, Spain, Italy, Portugal, Romania and Russia than it sends to these countries.

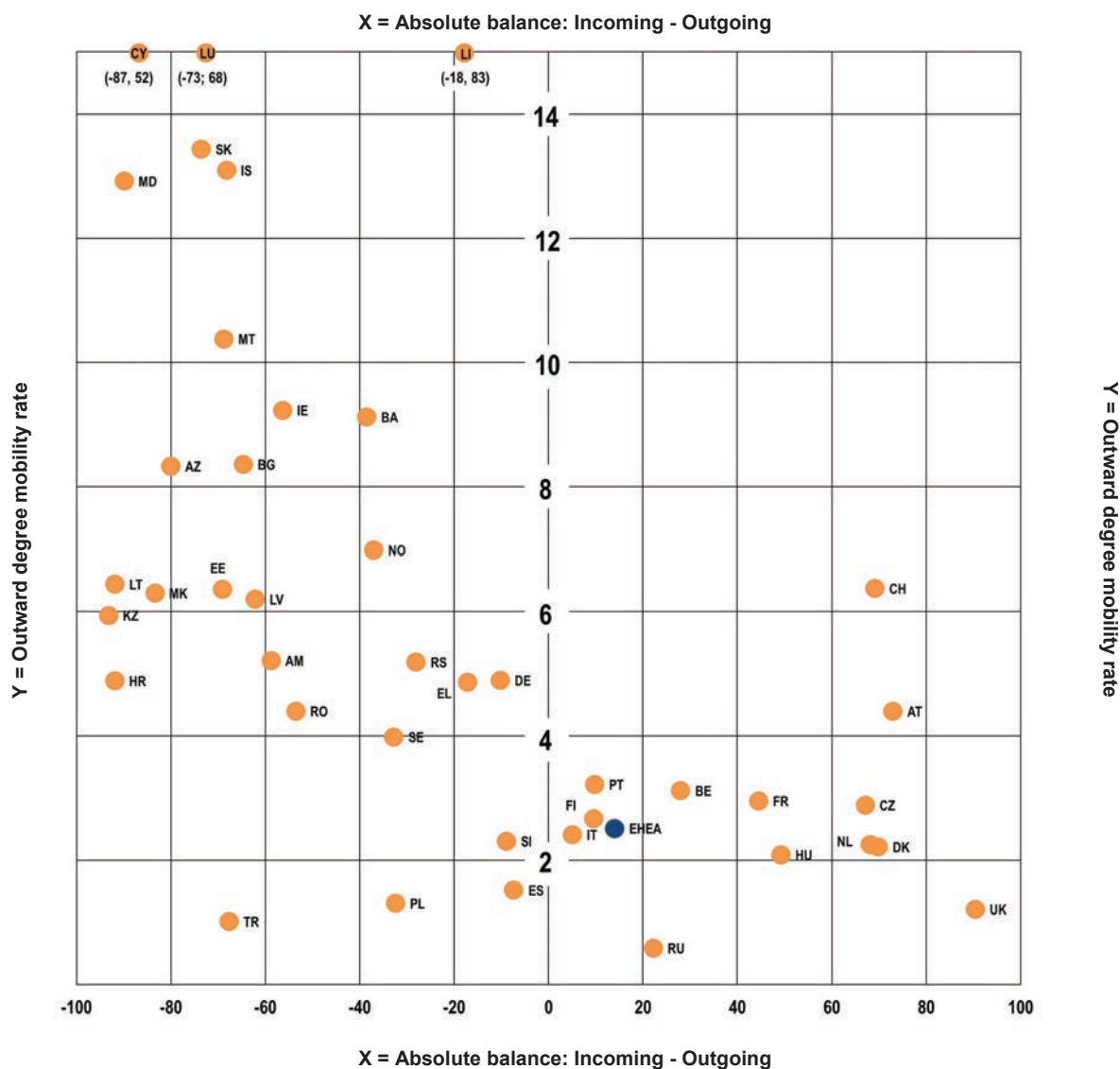
These specific bilateral imbalances in mobility flows may or may not be problematic for partners. As highlighted in the 2012 Mobility Strategy, when 'greater imbalances occur over longer periods of time,

⁽²⁴⁾ The absolute imbalanced mobility between two countries is defined as the absolute difference between students from country A in country B and students from country B in country A. Following Grabher, et al. (2014), only absolute imbalances greater than 1 000 students is considered. This measure is only a proxy of the imbalance of mobility flows as countries do not use the same criterion to report incoming students.

the governments concerned should jointly investigate the causes, consider carefully the advantages and disadvantages of the specific imbalance and seek solutions if deemed necessary' ⁽²⁵⁾.

Figure 7.25 gives more information on the mobility balance. It shows an obvious relationship between the mobility balance (X axis) ⁽²⁶⁾ and the outward mobility rate (Y axis) ⁽²⁷⁾: the higher the importing balance (on the X axis), the lesser the outward mobility rate (on the Y axis).

Figure 7.25 : Balance as a measure of the attractiveness of the education system of the country at tertiary education level (mobility flows within and outside EHEA), 2011/12



Notes:

Destination outside of the EHEA considered are: Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

⁽²⁵⁾ Mobility for Better Learning. Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012, p. 2.

⁽²⁶⁾ The X axis is the same balance concept as shown above, but computed on a different scale for graphical readability purpose. Indeed, in order to avoid a scale ranging to more than 10 units while most countries are below 1 (incoming/outgoing ratios, see Figure 7.23), the absolute difference (incoming – outgoing students) is computed and then divided by to the total number of incoming students (when the balance is positive) or by the total number of outgoing students (in case of negative balance). This results in a smoother continuum, more readable when plotted.

⁽²⁷⁾ Both axes include mobility flows within and outside the EHEA.

Countries more to the right have a high imbalance towards incoming, while countries more to the left have a high imbalance towards outward and countries closer to the middle are more balanced.

Countries up in the chart have high levels of outward mobility and countries down in the chart have lower levels of outward mobility.

Negative balance means that outward mobility is higher than inward mobility.

Positive balance means that inward mobility is higher than outward mobility.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Figure 7.25 also highlights some atypical countries. Despite being much more importers than exporters (they are situated on the right side of the X axis), Austria and Switzerland display a relatively high outward degree mobility rate (their outward mobility rate is higher than it would be expected within the general trend). Those systems are therefore considered as 'open systems' (both attractive and exporting), the types of systems that countries should strive for according to the 2012 Mobility Strategy ⁽²⁸⁾.

Conversely, the Baltic countries, Croatia, the former Yugoslav Republic of Macedonia, Kazakhstan and Turkey are sending much more students than receiving (they are situated on the left of the X axis), but such 'exportation' does not result in the highest outward mobility rates (their outward mobility rate is lower than it would be expected within the general trend). These could be considered as 'closed systems' (low outward and negative balance).

Slovenia, Spain, Italy and Finland are countries where the balanced flows hide a low mobility intensity (in terms of both incoming and outgoing degree mobility), while Liechtenstein is the only country where balanced mobility flows are accompanied with a relatively high outward degree mobility rate, meaning intense mobility flows from and to this country. On the whole, the number of countries with balanced mobility is rather low, and there are still few 'open systems'.

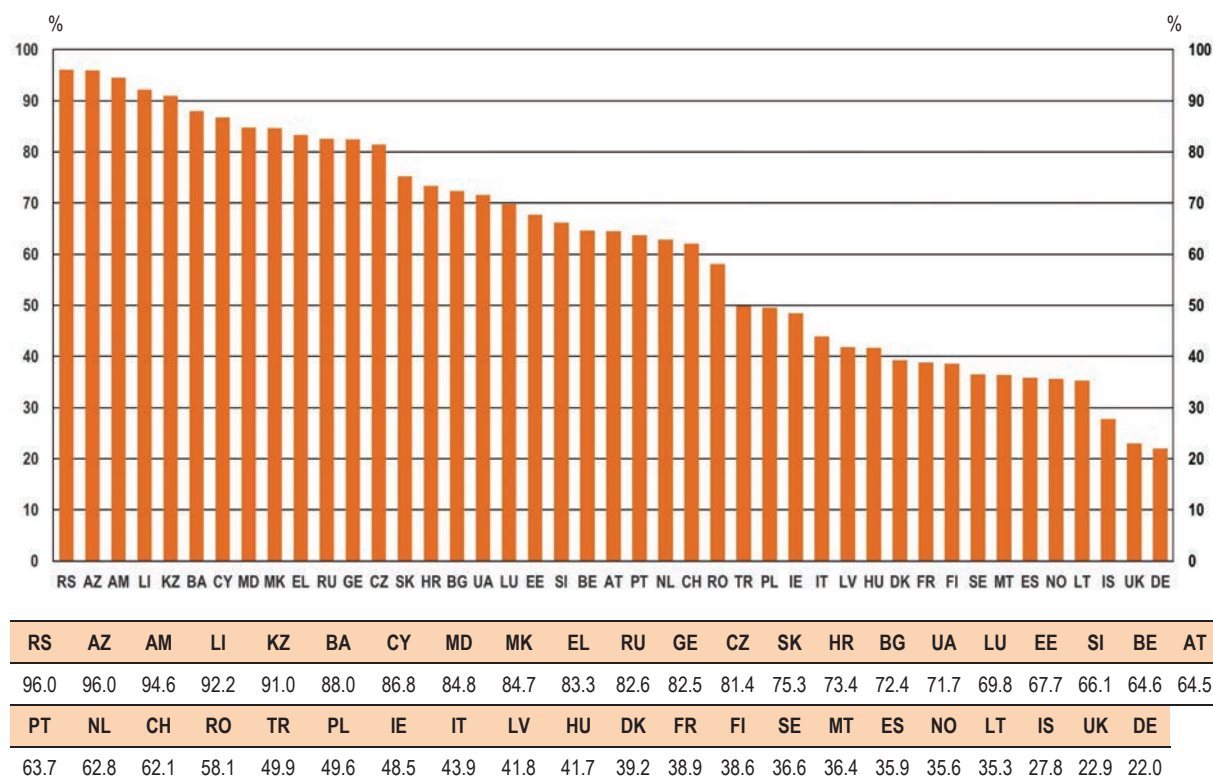
Mobility imbalances: Origin of students and destinations

From a more qualitative perspective, the balance of mobility flows can be shown in terms of origin (for host countries) and destination (for sending countries).

The indicator on the top three countries of origin (see Figure 7.26) computes the number of mobile tertiary students enrolled in a given country from the top three countries of origin, as a percentage of all mobile students enrolled in the country. A high percentage means that the top three countries provide most of the incoming students in the declaring country. Similarly to other indicators, the restriction of the geographical coverage to some countries outside the EHEA (see list above) is a clear limitation, especially for those countries that receive students from countries that are not in the selection.

⁽²⁸⁾ Mobility for Better Learning. Mobility strategy 2020 for the European Higher Education Area (EHEA), 2012, p. 2.

Figure 7.26: Student mobility flows: top 3 countries of origin (inward) in %, 2011/12



Notes:

Countries of origin considered are EHEA countries and Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Georgia and Ukraine: ISCED 5.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

In nearly half of the EHEA countries for which data is available, the origin of incoming students is not diverse. In a number of countries, the inflow of students is highly concentrated, as more than 90 % of incoming students come from three countries. This is especially the situation in Serbia (where nearly all mobile students are from Bosnia and Herzegovina, Montenegro and Croatia), Azerbaijan (from Turkey, Russia and Georgia), Armenia (from Russia, Georgia and India), Liechtenstein (Austria, Switzerland and Germany), and Kazakhstan (from Russia, Turkey and Azerbaijan).

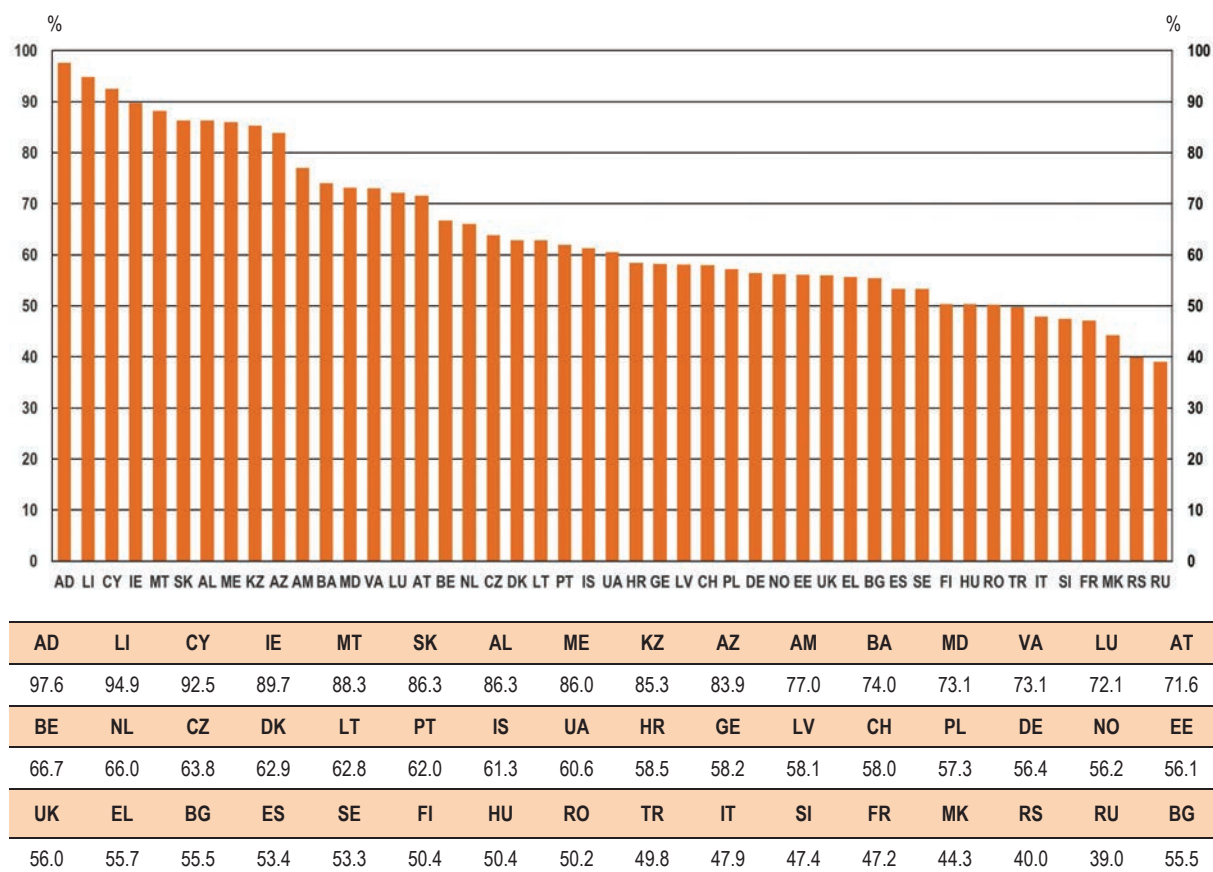
At the other end of the spectrum, the low percentage of the top-three providers suggests a highest level in diversity of origin of incoming students. This is for instance the case of the two countries that host the highest number of EHEA students (refer to Figure 7.19). Indeed, in the United Kingdom and Germany, students from the top-three origins account for less than 25 % of the total number of incoming students. In the United Kingdom 23 % of incoming students originate either from India, Germany, or Ireland. In Germany, 22 % of incoming students originate from Russia, Austria or Bulgaria. Students from the United States are among the top-three most represented origins in two EHEA countries: Ireland and Malta. In addition to the United Kingdom, students from India are among the top-three most represented origin in Cyprus and Sweden.

Geographical proximity, the share of common languages of instruction or historical legacies may not be negligible in determining the origin of incoming students in some countries. For instance, such factors may explain the pattern of student received in Belgium (from France, the Netherlands and Germany), in Switzerland (from Germany, France and Italy), Estonia (from Finland, Russia and Latvia)

and Finland (from Russia, Estonia and Sweden, but students from India are as numerous as those from Sweden).

The indicator on the top three countries of destination (see Figure 7.27) computes the number of mobile tertiary students of a given country of origin enrolled in the top three destinations, as a percentage of all mobile tertiary students of that country. The variety of destinations is impacted by factors similar to the previous indicator. At national level, the various measures aiming at fostering student mobility also have an impact on such diversity, since they usually prioritise particular geographical regions, sub-geographical areas or specific countries for privileged cooperation in this matter.

Figure 7.27: Student mobility flows: top 3 countries of destination (outward) in %, 2011/12



Notes:

Destination outside of the EHEA considered are: Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States. Japan: data according to citizenship. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

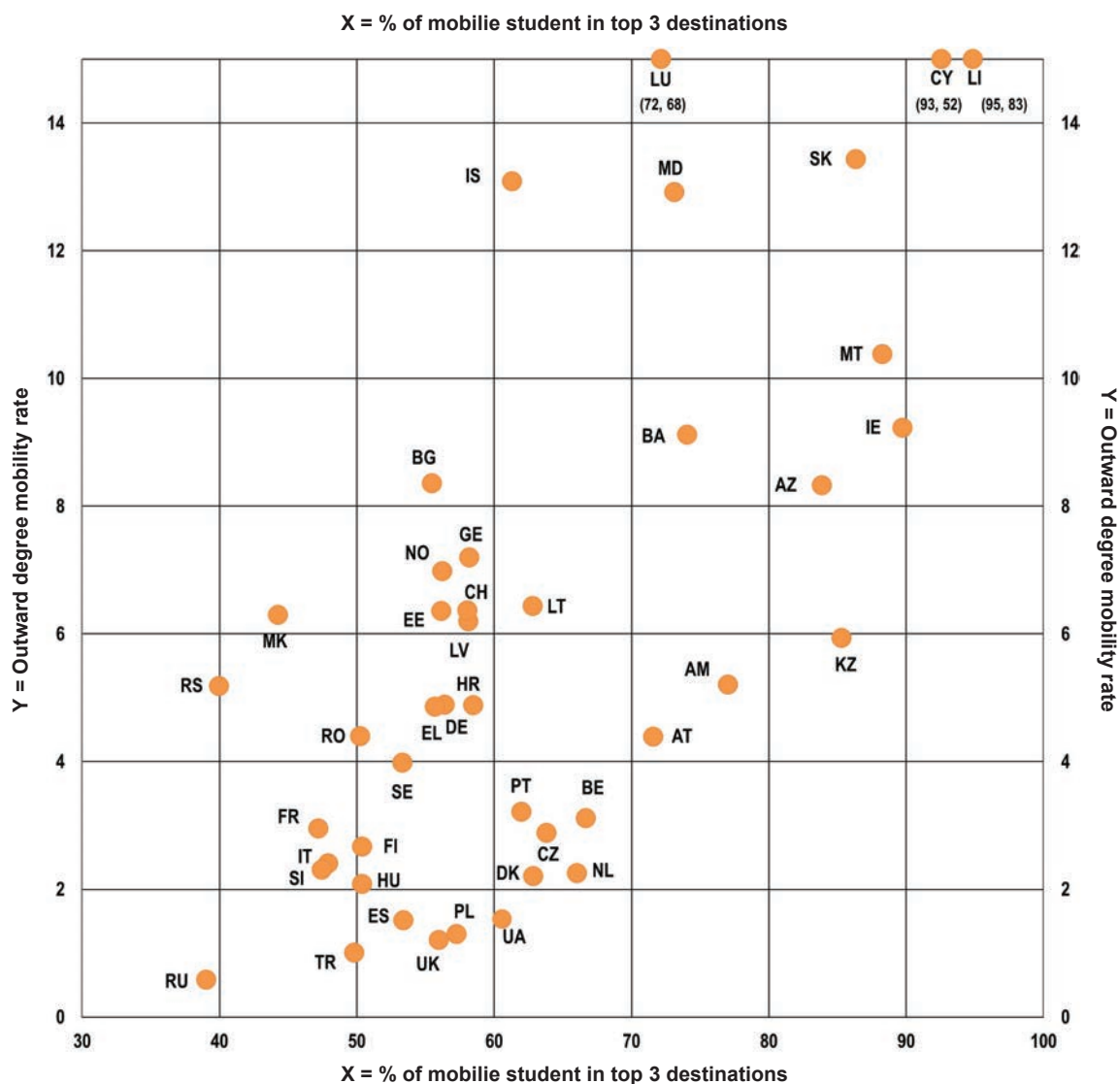
More than 90 % of outgoing students from Andorra, Liechtenstein and Cyprus are pursuing their tertiary studies in three countries. Most tertiary students away from Andorra are enrolled in Spain. Most students away from Liechtenstein are enrolled for a degree either in Switzerland, Austria or Germany, a situation which can surely be explained by their shared language and geographical proximity. Those away from Cyprus are mainly studying in Greece or in the United Kingdom, the United States being the third most common destination. The geographical proximity with Greece as well as the historical legacy with the United Kingdom may explain such pattern. The United Kingdom, the United States and France are the top three destinations of students coming from Ireland. However, the United Kingdom accounts for the largest share as it is the destination of nearly 81 % of Irish students undertaking a degree abroad.

As the United Kingdom is by far receiving the highest number of mobile students, it is not surprising that it is the top destination for students from many other countries: Switzerland (23 %), Denmark (27 %), Estonia (27 %), Greece (38 %), Spain (20 %), Finland (24 %), France (21 %), Italy (17 %), Lithuania (42 %), Latvia (36 %), Norway (27 %), Poland (24 %), Romania (19 %) and Malta (83 %). The United States is the most common destination of outgoing student from three EHEA countries: Sweden (22 %), Turkey (26 %) and the United Kingdom (35 %). Germany is the top destination for students from Austria, Bulgaria, Georgia, Hungary, Luxembourg and Russia.

Some countries show more specific patterns. For instance, 42 % of Czech mobile students go to Slovakia which sends 75 % of its mobile students to the Czech Republic. Germany, France and the United Kingdom receive 40 %, 18 % and 14 % respectively of Luxembourgish mobile students, while most of mobile students from Montenegro move to the neighbouring countries: Serbia, Bosnia and Herzegovina and Italy.

Having high numbers of students moving abroad could potentially lead to a high diversity of destinations. However, to some extent, countries having the highest mobility rates are also often those who show a low diversity of destinations (see Figure 7.28).

Figure 7.28: Outward mobility versus diversity of destination countries (mobility flows within and outside EHEA), 2011/12



Notes:

Destination outside of the EHEA considered are: Bahrain, Jordan, Morocco (reference year 2010), Oman (reference year 2011), Qatar, Saudi Arabia, United Arab Emirates, China – Hong Kong Special Administrative Region, China – Macao Special Administrative Region (reference year 2011), Malaysia, Thailand, Israel, India, Ghana, Brazil, Chile, Korea, Australia, Canada, Japan, New Zealand and the United States. Japan: data according to citizenship. Czech Republic, Greece, France, Italy, Finland, Norway, FYR of Macedonia, Turkey, Moldova, Georgia, Russia, Serbia, Azerbaijan, Ukraine, Kazakhstan, Bosnia and Herzegovina, Armenia: data refer to foreign student instead of mobile students.

Figure created by plotting the diversity of country of destination and the outward mobility rate.

Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

For instance, Liechtenstein, Luxembourg and Cyprus are the EHEA countries that present the highest outward rate. Two of them, that is, Liechtenstein and Cyprus, display a low diversity of destinations (high percentage of mobile students in top 3 destinations) despite showing different patterns: 85 % of mobile students from Liechtenstein move very often to Switzerland, while mobile Cypriot students mostly undertake a degree in Greece (47 %) and in the United Kingdom (44 %).

Some other countries show specific patterns. Kazakhstan records an outward mobility rate of 5.9 % but a very large majority of mobile students (75 %) go to Russia. Conversely, the outward mobility rate of Serbia is 5.2 % but the top three destinations (Bosnia and Herzegovina, Austria and Hungary) accounts each for less than 16 %. Russia is in a similar position, outward mobility rate is relatively low (0.6 %) and the top three destinations account altogether for only 39 %.

The general picture of student degree mobility flows looks rather similar to the situation described in the previous implementation report, although the numbers in some countries have increased or decreased. The flows are still quantitatively imbalanced and new indicators allowed identifying qualitative imbalances more precisely than it was possible in the last report. Forthcoming data on credit mobility should provide more information and allow a better assessment of mobility flows affecting EHEA countries both quantitatively and qualitatively.

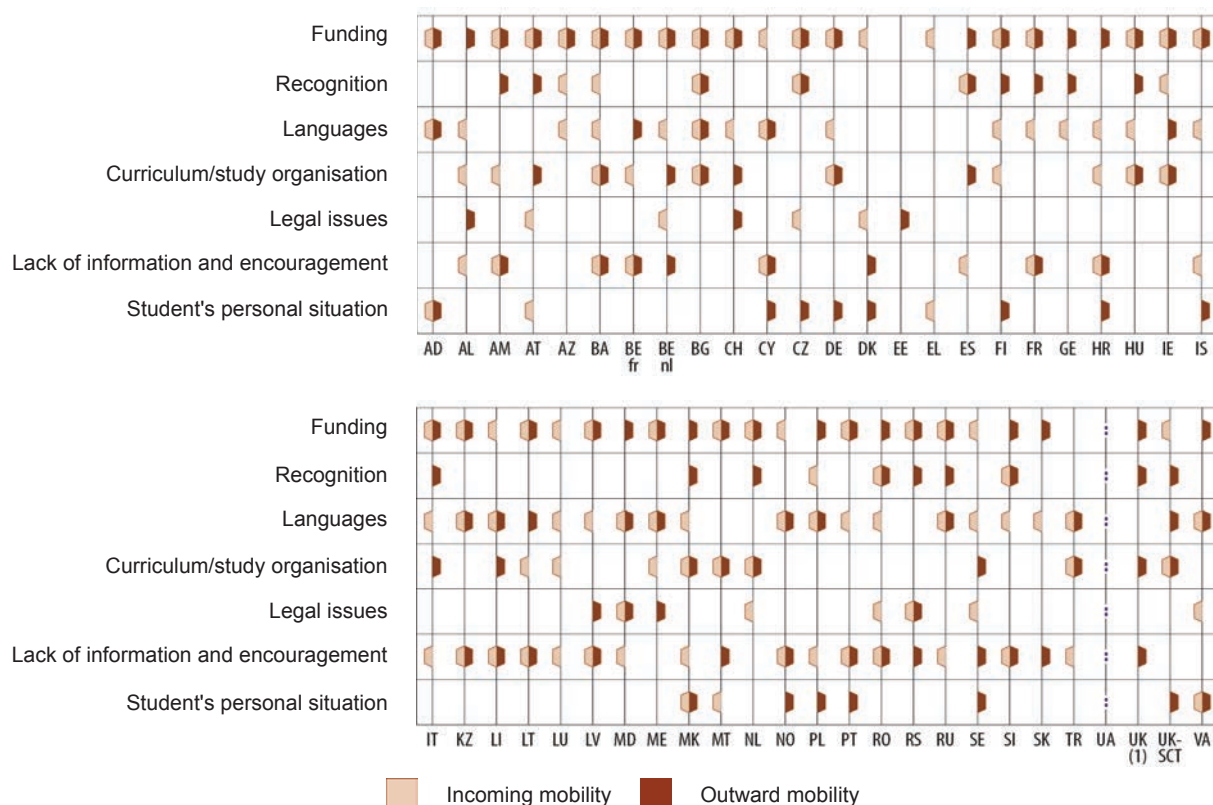
7.2.3. Obstacles to student mobility

Data available shows that relatively limited numbers of students are mobile in proportion to the EHEA student population. This situation may partly be explained by the fact that many obstacles continue to prevent a number of students from being mobile.

Both the Bucharest Communiqué and the Mobility Strategy stress the importance of removing existing obstacles to mobility. For this reporting exercise, countries have identified the most important obstacles that they perceive preventing student mobility (Figure 7.29), without distinguishing between credit and degree mobility.

Lack of funding is the most often cited obstacle to both incoming and outgoing student mobility. However, for incoming mobility, language-related barriers are considered to be equally important as funding. Some countries (Austria, France, Moldova, Hungary, Switzerland, United Kingdom) note that the majority of courses are still offered in only one language. In some cases prospective mobile students are required to learn the language of the host country which could be time-consuming and result in additional financial burden. Language obstacles concerning ingoing mobility were twice as often cited compared to outgoing mobility

Figure 7.29: Obstacles to student mobility, 2013/14



Source: BFUG questionnaire.

UK (1) = UK-ENG/WLS/NIR

Another important obstacle for both incoming and outgoing mobility according to countries is the lack of information and encouragement. Curriculum/study organisation is also mentioned as one of the main obstacles to mobility to both directions. Recognition issues are considered equally important as curriculum/study organisation in the context of outward mobility, while they are cited twice less often in relation to incoming mobility. As with languages, recognition issues may be explained through perception of the issue. In other words, these findings suggest that countries see their own systems and students better prepared for mobility than those elsewhere. For example, regarding languages, countries may consider their students better prepared for studying abroad than incoming students. Similarly, countries may consider that national outgoing students are more at risk of experiencing recognition problems if they study or have study-related activities abroad than their incoming counterparts.

Only a small minority of countries mentioned legal obstacles such as immigration regulations and visa procedures as a major obstacle to mobility. In most cases these are non-EU countries for outgoing mobility and EU countries for incoming mobility. Personal and family issues are more often cited as an obstacle to outgoing mobility. Germany, the Czech Republic and Switzerland mentioned that an additional obstacle to outgoing mobility could be the need to extend the overall duration of studies due to recognition, curriculum and language problems.

Overall, when combining countries' answers related to incoming and outgoing mobility, the three most common obstacles are: lack of funding, language issues and lack of information and encouragement. In the 2012 reporting exercise, lack of funding also came first, followed by languages issues and recognition issues.

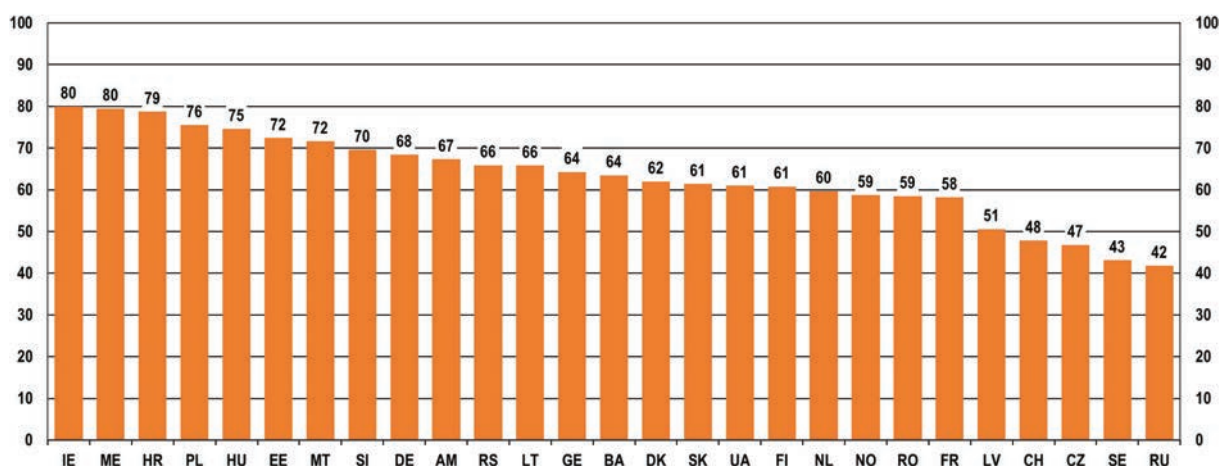
Countries have also reported whether some obstacles are particularly relevant for a specific field of study. The majority of countries highlight persisting difficulties with recognition and inflexible curricula. For instance, regarding various fields of studies, medical and natural sciences, law and teaching

appear to have more challenges in promoting mobility. Indeed in subjects leading to professional qualifications, mobility can be difficult as students often stay in the home country to ensure they can meet the specific requirements (course elements or course modules) of the relevant national professional regulator / body. Moreover, countries report specific obstacles related to both credit and degree mobility. The most common concerns for credit mobility also lie in recognition and curriculum organisation. The issue of increasing demand for traineeships abroad and persisting problems related to their recognition has been particularly singled out. The most relevant obstacles to degree mobility appear to be lack of funding and languages.

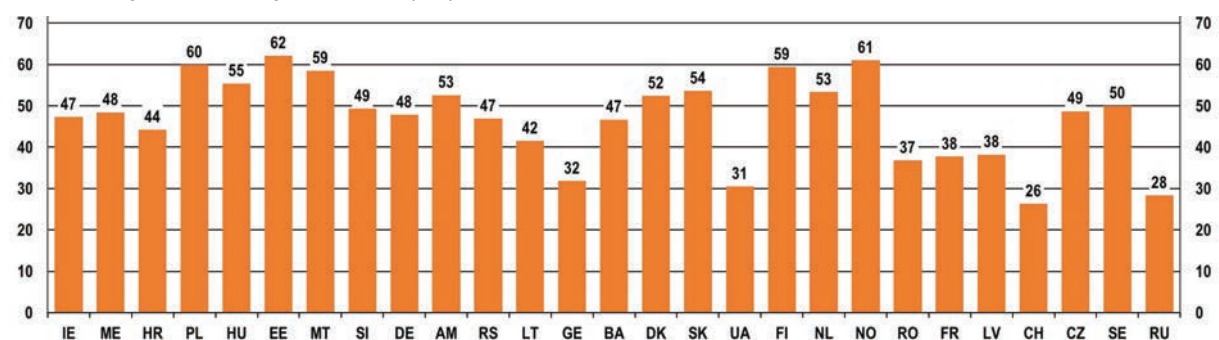
The Eurostudent survey allows the comparison between countries' and students' perceptions with regard to obstacles to mobility. Figure 7.30 shows obstacles as perceived by students when considering enrolment abroad (outward mobility). The data do not distinguish between credit and degree mobility.

Figure 7.30 : Share of students who have not been enrolled abroad and do not plan to enrol abroad considering selected issues as (quite) big obstacles (in %), 2013/14

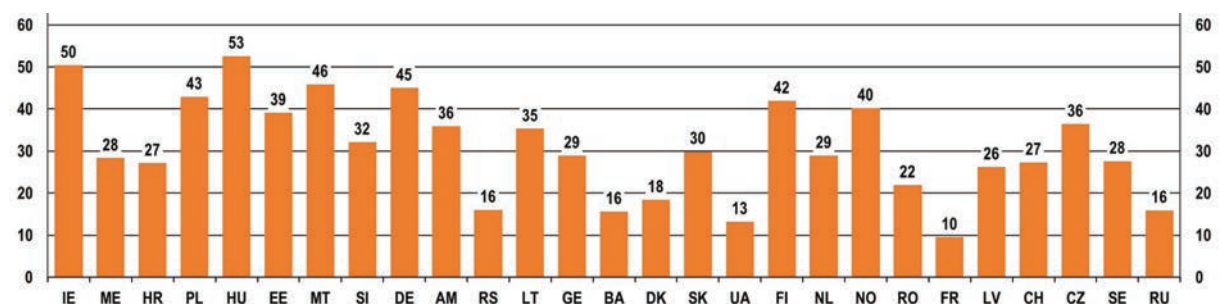
a. Additional financial burden



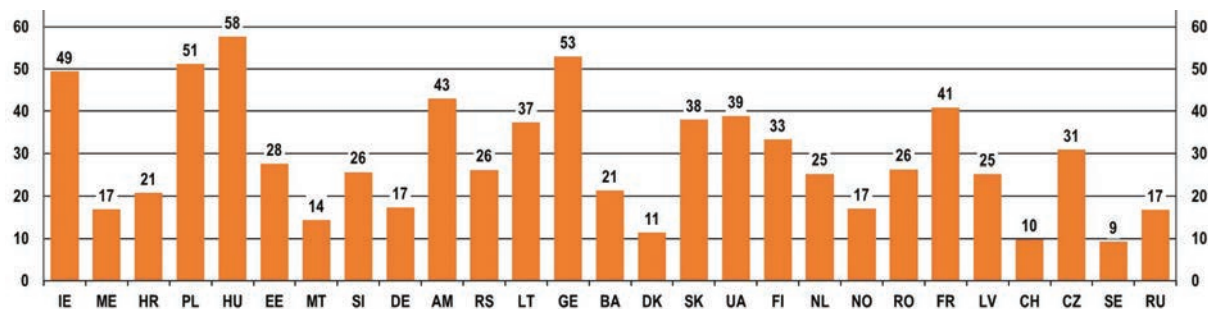
b. Separation from partner, child(ren), friends



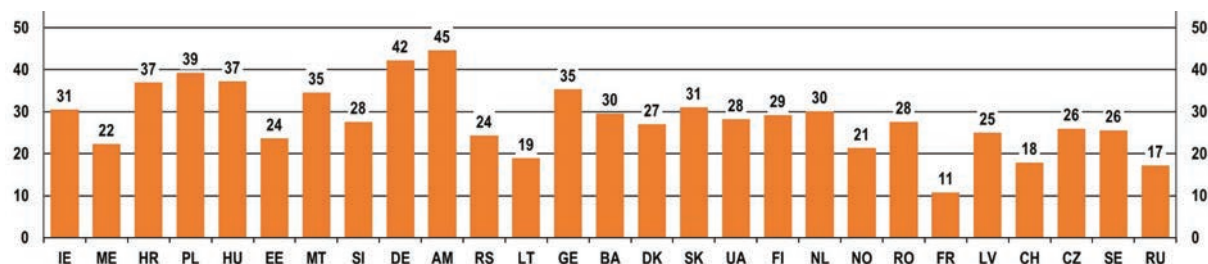
c. Loss of paid job



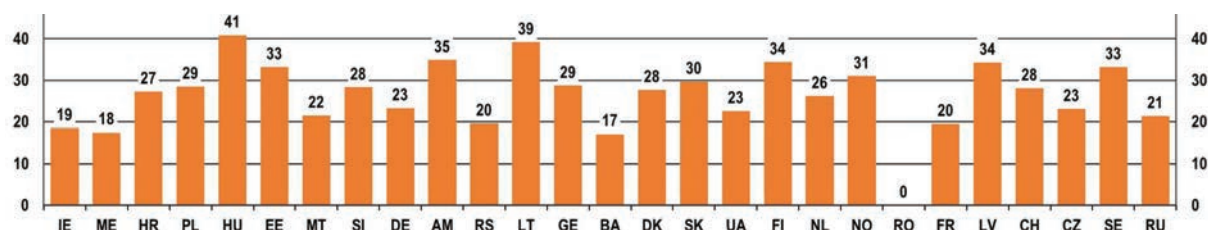
d. Insufficient skills in foreign language



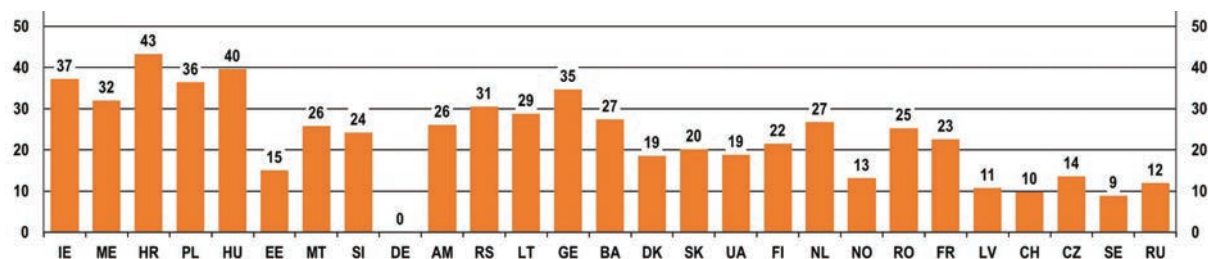
e. Difficult integration into structure of home study programme



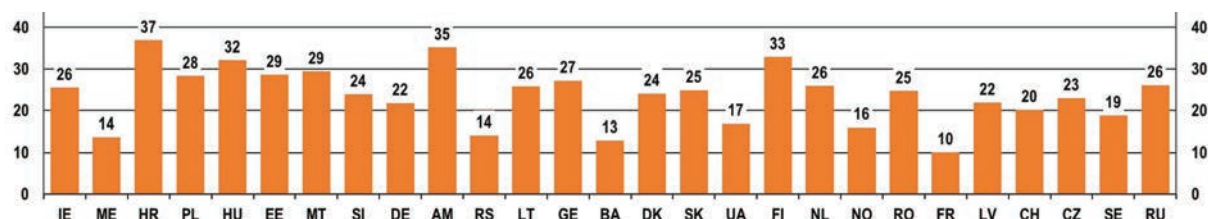
f. Lack of motivation



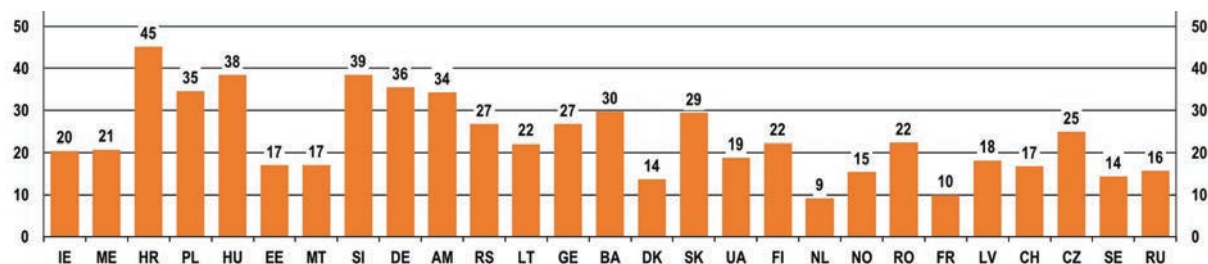
g. Lack of information provided by home institution



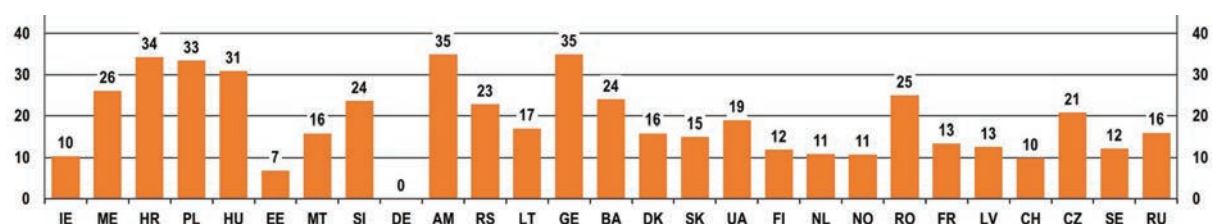
h. Low benefit for studies at home



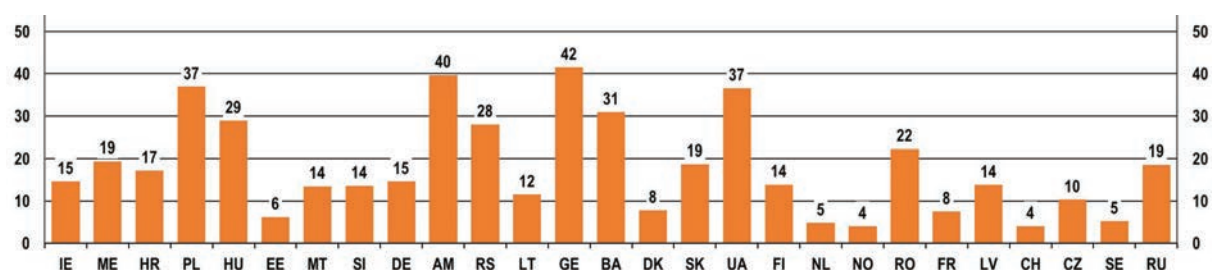
i. Problems with recognition of credits gained abroad



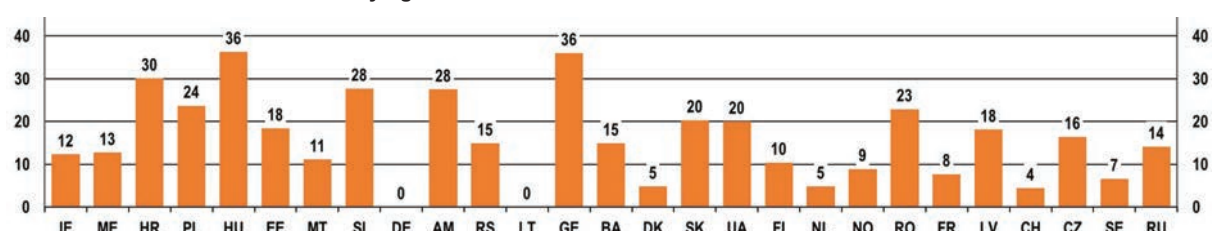
j. Limited admittance to mobility programmes (of home/host institution)



k. Problems with access regulations to the preferred country (visa, residence permit)



l. Insufficient marks for studying abroad



Notes:

No data: AT, IT. No data for "lack of information provided by home institution": DE. No data for "lack of motivation": RO. No data for "insufficient marks for studying abroad": DE, LT. No data for "limited admittance to mobility programmes": DE.

Source: EUROSTUDENT V, K.15.

The first four obstacles identified by students are 'additional financial burden', 'separation from partner, child(ren) and/or friends', 'loss of paid job' and 'insufficient skills in foreign language'.

Similarly to the 2012 report, countries and students ranked both the financial issues as the main obstacle to mobility. Student's personal situation is still the second obstacle cited by students themselves, while this is not perceived by the countries themselves, as they do not have knowledge of students' situation. However, while countries highlight the lack of information and encouragement as the second obstacle that could prevent students from undertaking studies abroad (outward mobility), this issue appears not to be a top obstacles in students perspective. Similarly, recognition issues seem to be more important for countries than for students.

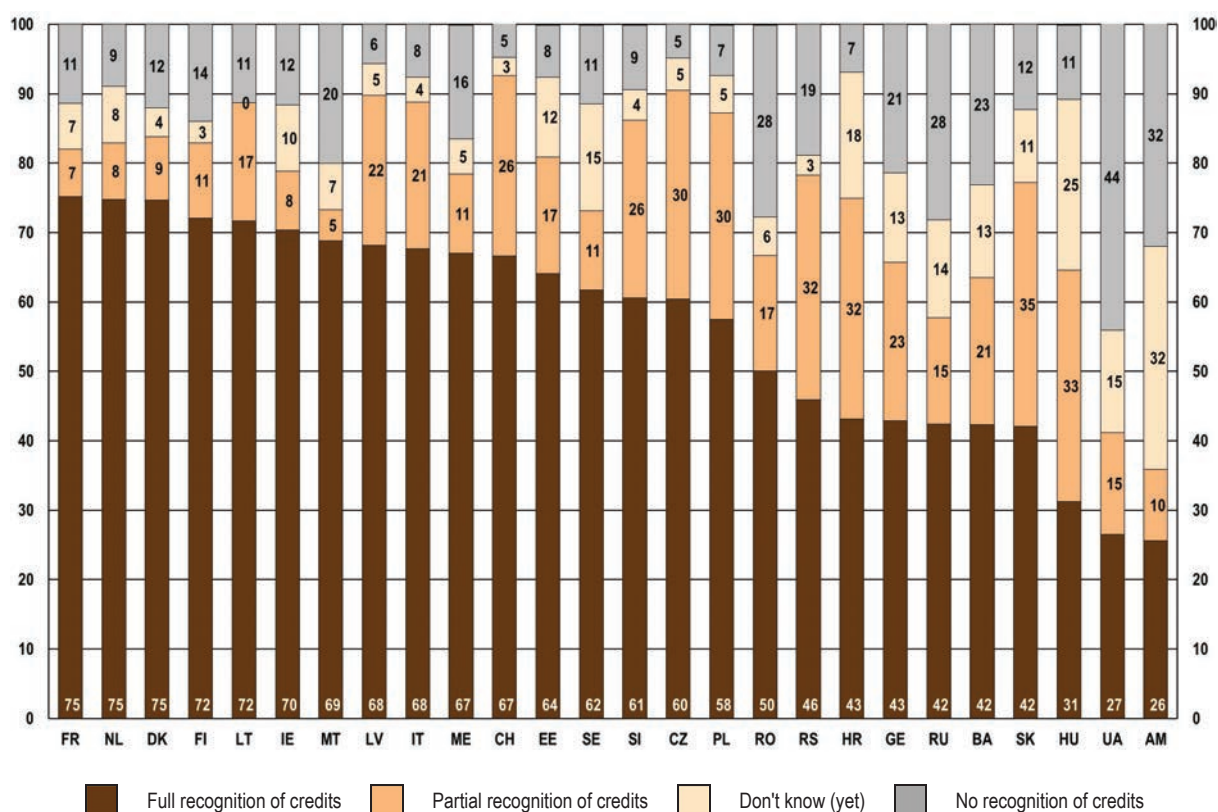
Study/curriculum organisation and language issues are fairly equally important to countries and students, whereas the loss of paid job seems to be an important obstacle for students. The context of crisis and uncertainty may explain this high ranking. Visas and legal issues do not appear to be of critical importance for either countries or students.

Thus both countries and students give a similar priority to funding, study organisation and languages. The same conclusion was drawn in the previous report. Countries and students opinions differ markedly on recognition and information provision (countries' priorities) and on personal situation (students' priority).

Eurostudent has also conducted a survey on recognition issues. Figure 7.31 presents information on credits (ECTS, certificates) that students have gained abroad after being temporarily enrolled abroad

and returning to their home institution (credit mobility) ⁽²⁹⁾. Full recognition of credits seems to be a common practice in the majority of countries where data is available, although there is still room for improvement. Large differences also emerge between countries. In Armenia, 26 % of students who have been enrolled abroad have seen their credits gained abroad recognised, while it was the case for 75 % of students in France, the Netherlands and Denmark. Moreover, the share of students who do not get any recognition of credits seems to be relatively high in some countries where data is available (Armenia, Hungary, Croatia, Sweden and Ukraine).

Figure 7.31: Recognition of credits gained during (most recent) enrolment abroad - Share of students who have been enrolled abroad (in %), 2013/14



Notes:

No data: AT, DE, NO.

Source: EUROSTUDENT V, K.8.

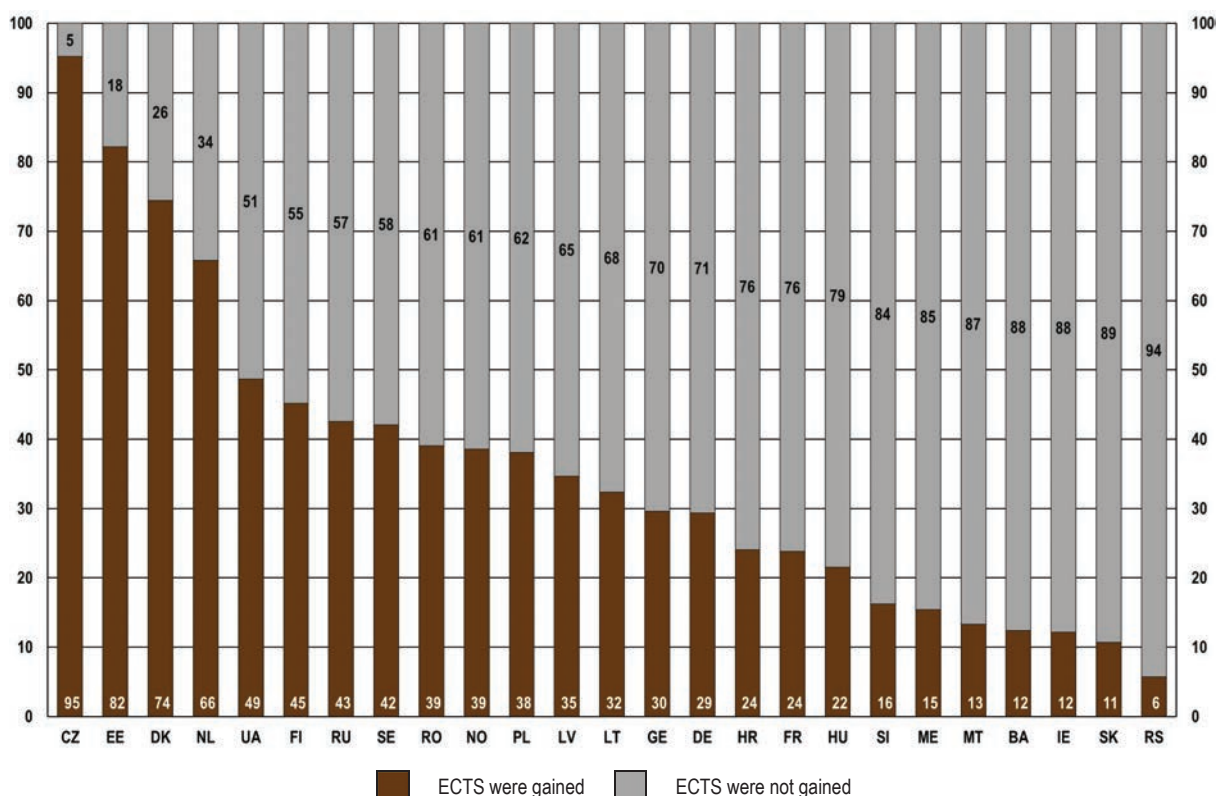
The use of learning agreements (agreements between the students who study abroad and their home and host institutions) is an important means to prevent the non-recognition of credits. Within the EHEA, a broader use of European tools such as ECTS and learning outcomes (within the National Qualifications Framework) would also help the recognition of study periods abroad.

⁽²⁹⁾ As stated in Chapter 2, the recognition of credits gained abroad is fully in the hands of higher education institutions across the EHEA.

Figure 7.32 shows the recognition of credits (ECTS, certificates) that students have gained after having spent a period abroad for study-related activities, such as internships/work placements, language courses, research stays, summer schools, etc. In this case, the non-recognition of credits is more common among the countries where data is available. Significant differences also emerge between countries, ranging from 6 % of Serbian students who have experienced study-related activities abroad have gained credits to 95 % of students in the Czech Republic.

The results from Eurostudent survey regarding recognition show that there is still room for improvement. As recognition plays an important role in facilitating mobility, it would be essential to make progress on this issue in the next period.

Figure 7.32: Attainment of ECTS for study-related activities abroad (other than enrolment) - Share of students who have been abroad (in %), 2013/14



Notes:

No data: AT, IT CH.

Source: EUROSTUDENT V, K.20.

7.2.4. Measures to tackle obstacles to student mobility

Countries in the EHEA implement a range of measures to foster mobility and tackle obstacles preventing it. Some obstacles such as the re-organisation of programmes and strengthening of information provision can be perhaps addressed more easily than others – provided that there is will to do so. On the other hand, funding, improving language skills, recognition and legal issues might be more difficult to tackle as they require either increased financial means or further dialogue and coordination among various stakeholders at institutional, national or European levels.

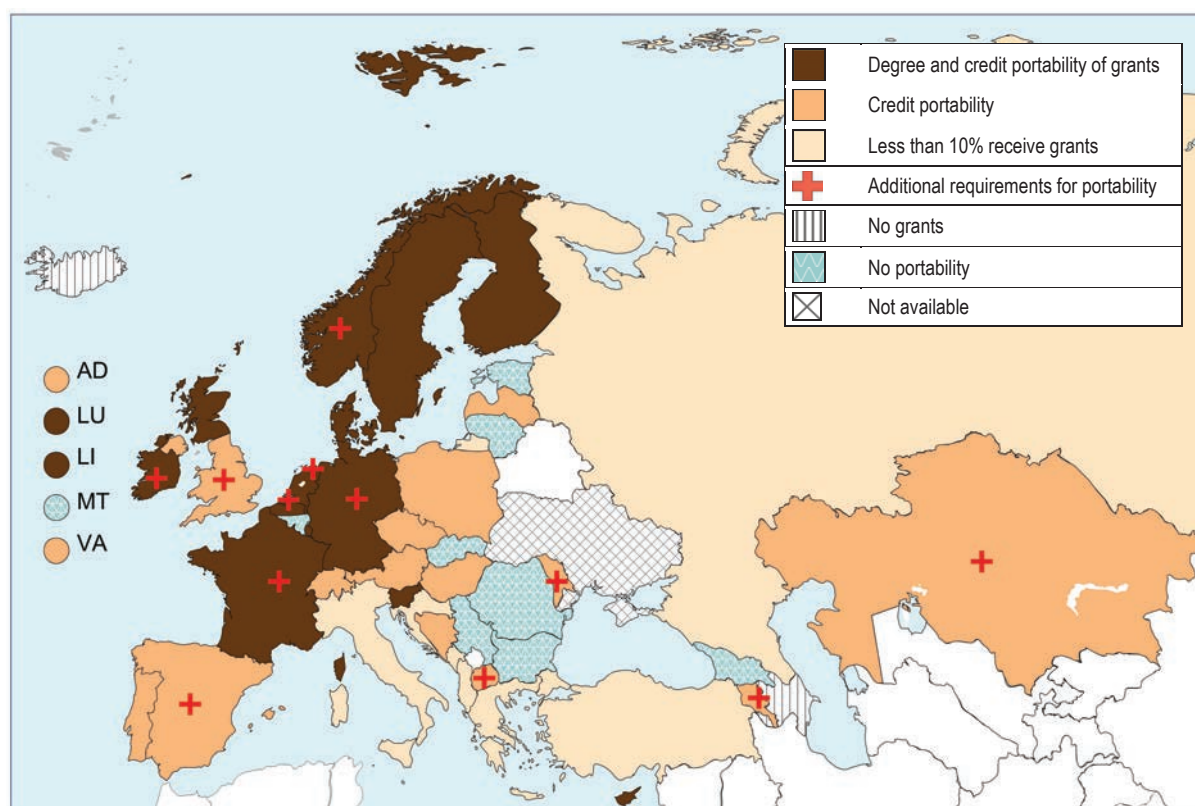
As the lack of funding seems to continue to be the most important barrier to student mobility in almost all EHEA countries, it would be important to address this issue in priority. The two aspects of funding are first, the portability of grants and loans and second, the provision of additional mobility funding.

Portability of grants and loans

Portability of grants and loans for facilitating mobility has been a concern within EHEA for many years, but this is clearly an area where further actions are still needed⁽³⁰⁾. It is a key element to ensuring equal access to mobility for students. This topic was discussed within the Working Group on Mobility and Internationalisation and guidelines are likely to be submitted for adoption at the Yerevan Conference.

Figures 7.33 and 7.34 below illustrate the main characteristics of portability of grants and loans across the EHEA, distinguishing between credit portability (portability of grants or loans for credit mobility) and degree portability (portability of grants or loans for degree mobility).

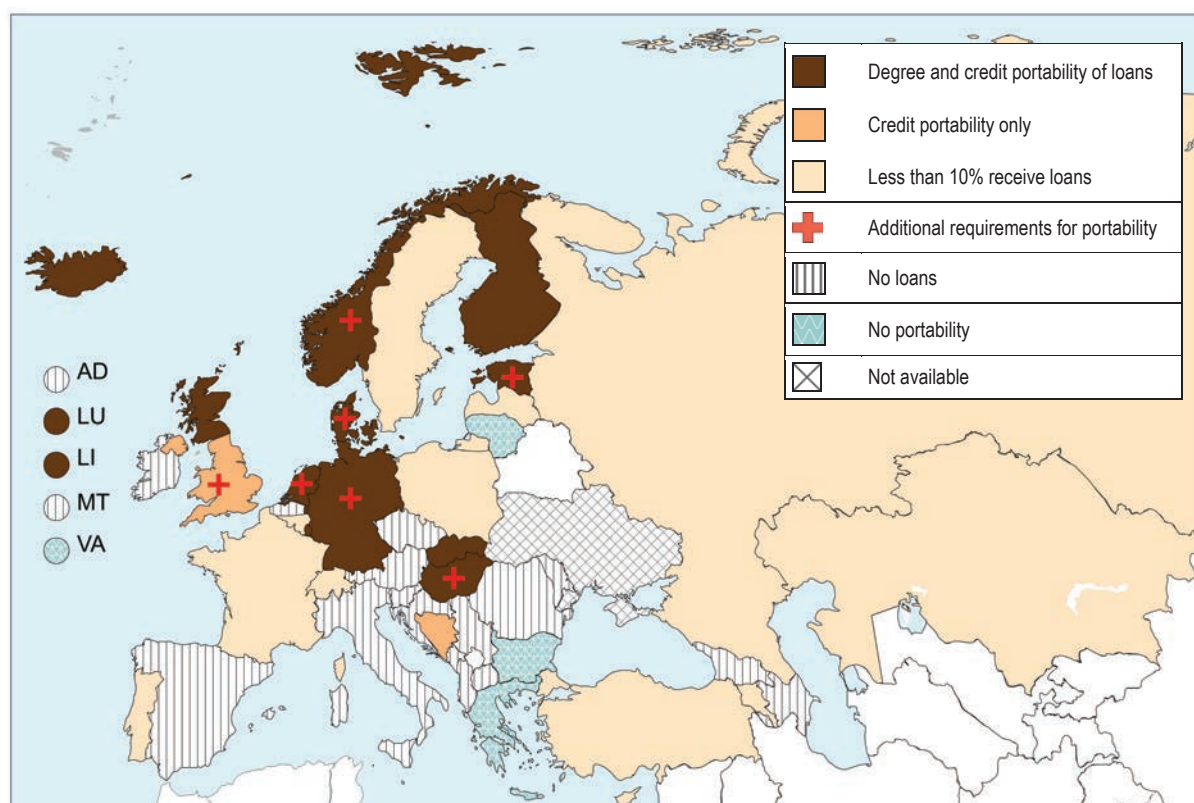
Figure 7.33: Portability of grants, 2013/14



Source: BFUG questionnaire

⁽³⁰⁾ The concept of portability shows whether students who study in a higher education institution in another country can use their grant or loan under the same conditions as at a home institution.

Figure 7.34: Portability of loans, 2013/14



Source: BFUG questionnaire

Restrictions on portability have been examined, mostly in terms of additional requirements that students and/or the chosen study programme abroad need to fulfil for the grant or loan to become portable. Such restrictions include, for example, a limitation on countries where students can take their support (e.g. portability within the European Economic Area only), limits on the time to be spent abroad, or compulsory full-time studies. The most severe restriction is limiting the support abroad to study if no equivalent programme is available in the home country. Since this means that portability is allowed only in exceptional cases, countries applying this condition are listed as having 'no portability'.

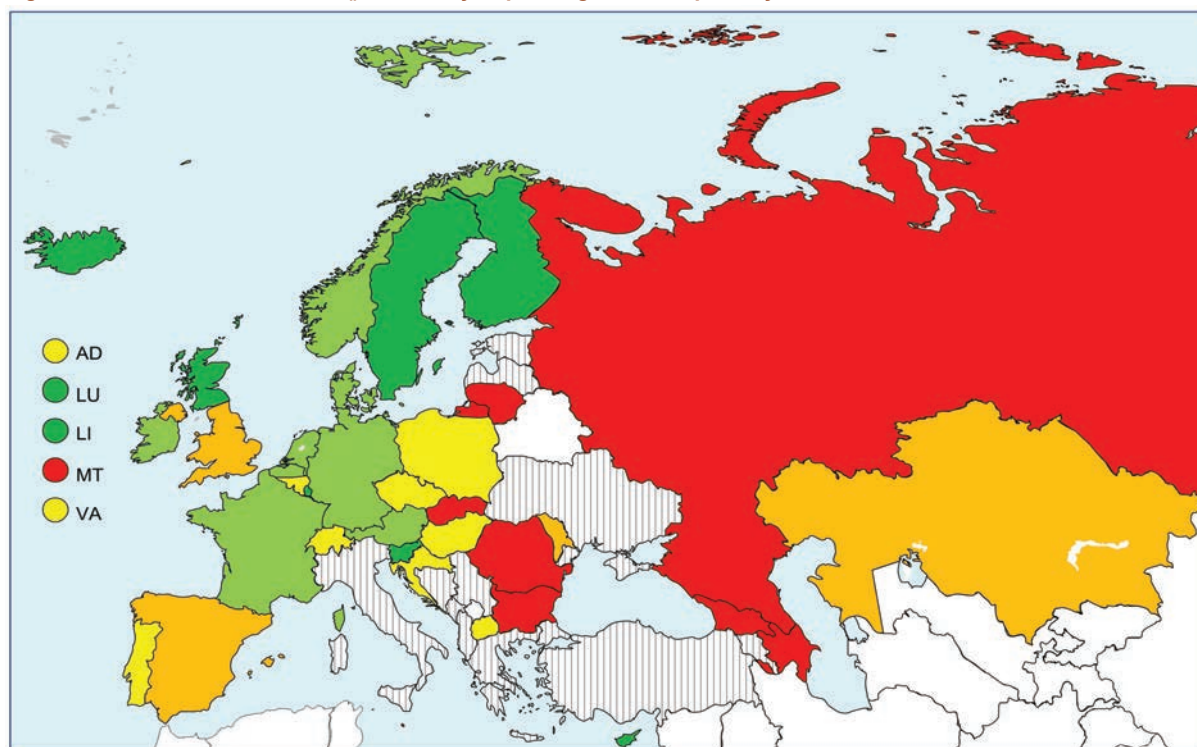
Grants are portable for either degrees or credits taken abroad in almost two third of education systems in the EHEA, mostly in Western European countries. However, portability of grants is far more common for credit mobility than degree mobility. Similar patterns can be seen portability of loans, although there are fewer countries offering publicly subsidised loans as part of the student support system. Overall, portable loans are offered in less than one third of the systems where data is available. Cyprus, Denmark, Finland, France Germany, Liechtenstein, Luxembourg, the Netherlands, Norway and Sweden are the only EHEA countries to offer portability for degree and credit mobility, for both grants and loans.

In many countries however, there are some additional requirements that need to be fulfilled for both grant and loan portability. For grants, there are additional requirements to be fulfilled in 13 higher education systems. In Belgium (Flemish Community) the additional requirements concern only mobility out of the EHEA. In Belgium (French Community), the grants are portable provided that the programme followed abroad is not given by any higher education institutions. For loans, additional requirements need to be fulfilled in eight systems. On the whole, 14 higher education systems either offer no portability for grants and loans or very few grants and loans to large number of students.

These realities are reflected in Figure 7.35, a scorecard indicator on portability of public grants and loans. The picture reveals considerable variation in overall performance. 9 countries are not considered in this indicator, as less than 10 % of the student population receive support in the form of

grants or loans. For the others, there are 8 systems where available support is fully portable, and a further 8 where the principle of portability operates but there are some restrictions in how it is implemented. 10 systems have portability for credit mobility only, and a further 4 implement portability in credit mobility only but place some restrictions. There are also 8 higher education systems where support is not portable

Figure 7.35: Scorecard Indicator () Portability of public grants and publicly subsidised loans



Scorecard categories

- **Full portability** across the EHEA of all available national student support measures – grants and/or loans* – for credit and degree mobility. Equivalent requirements for public grants and/or loans if students study in the home country or abroad.
- **Portability** of all available national student support measures – grants and/or loans – for credit and degree mobility, but **with some restrictions** related to geography (country limitations), and/or types of programme, and/or field of study or time.
- **Credit mobility** only, without restrictions
- **Credit mobility** but **with some restrictions** related to geography (country limitations), and/or types of programme, and/or field of study or time..
- **No portability****: public grants and/or loans are only provided if students study in the home country or in exceptional cases (no equivalent programme is available in the home country).

Source: Eurydice

Note



11 countries are considered non applicable because less than 10% of the student population receive grants and/or loans.

* all available national student support measures” refers to publically funded grants and loans. For the purposes of this indicator, a grant is considered to be non refundable public aid given to students, and does not include fee waivers applicable within a national system

** Countries where less than 10% of the student population receive financial support in the form of grants and/or loans will be considered as "Not Applicable" for this indicator.

Other financial support

Some countries reported a number of specific financial instruments supporting incoming and outgoing students. In Austria for instance, incoming mobility is encouraged by providing opportunities for part-time work, CEEPUS grants (Central European Exchange Program for University Studies) for Central and South-eastern European students, special scholarships for students of literature, etc. Outgoing mobility is supported through the national co-funding for Erasmus+ grants, needs-based grants and extra funds for studying abroad that can be used for degree mobility. In Lithuania, students can receive specific scholarships and loans for study periods abroad. In Germany, for outgoing mobility, the German Academic Exchange Service (DAAD) offers various scholarships. A special support scheme is the Bologna Mobility Package (integrated exchange programmes, based on inter-university agreements, double degree programme, pilot programme Bachelor Plus 4 years), as well as programmes to foster the mobility of free movers (grants for research internships of Bachelor students, semester grants and summer academies, language preparation for languages other than English). For incoming mobility, the DAAD offers scholarships and administers programmes to support, inform and welcome foreign students in German universities.

Some countries also reported on targeted funding for disadvantaged students, especially with regard to credit mobility (Belgium, Finland, France, Germany, Portugal). For example, Belgium (French Community) offers additional public financial support through the Student Mobility Support Fund (FAME). The FAME intends to support mobility of underrepresented groups, mostly from lower socio-economic background.

Other measures to tackle obstacles to student mobility

As linguistic barriers still represent an important obstacle to mobility, attention should be paid to language considerations both at national and institutional levels (through a comprehensive language policy, for example). Around half of the countries mentioned measures such as the provision of language courses for outward and incoming students, as well as for academic staff, when required, and developing curricula/programmes in English or other foreign languages, including joint programmes degrees. Germany offers language preparation in languages other than English in order to encourage more balanced mobility within the EHEA. In Italy, programmes taught in a different language have been incentivised (Ministerial Decree 104 of 2014 and Ministerial Decree 1059 of 2013) and, where *numerus clausus* is compulsory, entrance exams are conducted in English and can be taken remotely.

In spite of introducing and enlarging programmes in foreign languages, there might be restrictions to study at higher education institutions in a language different to the official language of the country. In France, the law on higher education and research from 22 July 2013 allows higher education institutions to set up courses in foreign languages in the framework of international partnerships, while ensuring the offer of French-taught modules. In Belgium (Flemish Community), the rules for establishing English Taught Masters courses have become more flexible, and now up to 35 % of all master courses may be taught in English. In Belgium (French Community), the act of 7 November 2013 further enlarged the possibilities offered to higher education institutions to organise programmes in other languages: for Bachelor's programme, up to 25 % of the programme can be taught in another

language; for Masters programme, up to 50 % (except the Masters programme leading to a teaching qualification); for advanced bachelor and master's programmes as well as third cycle programmes, the whole programme can be taught in another language. Moreover, all joint programmes organised with a higher education institution abroad can be fully taught in another language. Higher education institutions may also ask the minister responsible for higher education an exception to these rules if the programme shows an international dimension or a high scientific quality.

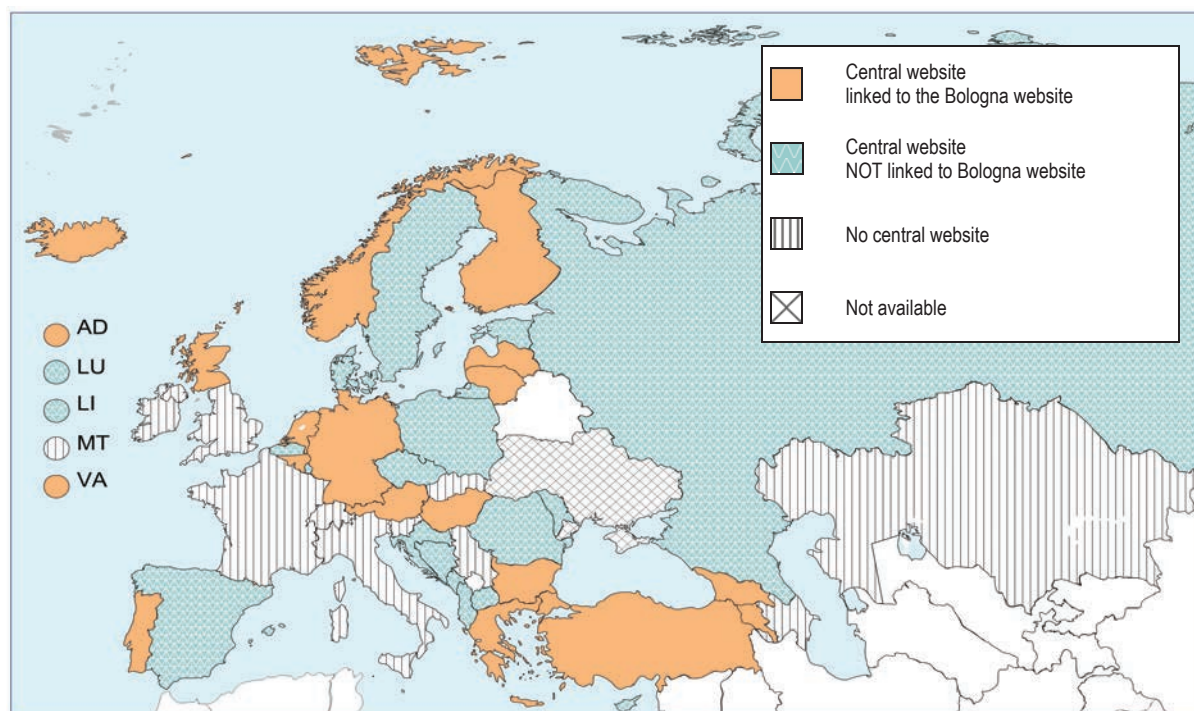
Overall in the EHEA, higher education programmes taught in widely spoken, non-native languages usually fall under the same legal regime as programmes taught in official languages. Different legal regimes exist only in the Czech Republic, Estonia, Latvia, Poland, Slovakia and Turkey, where students in such programmes usually pay additional fees, as well as in Italy, where there are differences in the quality assurance and accreditation procedures. In Ireland and the United Kingdom, no higher education programmes in non-native languages are being offered.

A number of countries also report on measures to address recognition issues. In France, for instance, specific measures to increase recognition include the arrangements for international joint supervisions of theses (*co-tutelles internationales de thèses*) and more flexible arrangements for genuine joint degrees, together with legal diploma models with international partners set for the award of these joint degrees, as set out in a 2011 ministerial note. In Turkey, the National Agency is carrying out audit visits to higher education institutions to see the extent of the recognition problems and propose solutions. The outcomes of these visits are shared with other institutions during national events. Institutions are also advised to fully implement the principles of Erasmus University Charter which advocates the full recognition of mobility. In Bulgaria, higher education institutions are encouraged to develop internal procedures for recognition. Thematic seminars on recognition have been organised in the framework of the National Teams of Bologna Experts. Belgium (French Community) reports on a guide of good practices on academic recognition for higher education institutions developed by the Bologna Experts and the Ministry. Similarly, in Italy the Bologna Experts Campaign and the ENIC/NARIC Centre has worked to support higher education institutions in improving recognition practices, both for credit mobility and for recognition of degrees.

Improving the information on and the promotion of student mobility opportunities is crucial to tackling obstacles linked to lack of information. Support services, including the provision of better information on mobility programmes, thus need to be continuously strengthened. Several countries have launched campaigns with the aim of motivating students to study abroad. Additionally, former Erasmus students as well as incoming students may be engaged to help in promotion activities. In Austria, better and timely information is provided to students in secondary education. Finland targets disadvantaged students in the provision of information on mobility opportunities highlighting possibilities of getting specific assistance and specific scholarships for mobile student with special needs.

The majority of countries have established a central website which provides information about all mobility schemes for national and international students (see Figure 7.35). In around 20 countries these websites are also linked to the Bologna website (www.ehea.info). In some countries without a comprehensive website, as for instance in the United Kingdom (England, Wales and Northern Ireland), higher education institutions operate their mobility programmes and provide opportunities on an institution by institution basis. Some countries also reported on the development of administrative support for incoming and/or outgoing mobile students at institutional level (e.g. international/mobility offices).

Figure 7.36: Central website with information about all mobility schemes for national and international students, 2013/14



Source: BFUG questionnaire

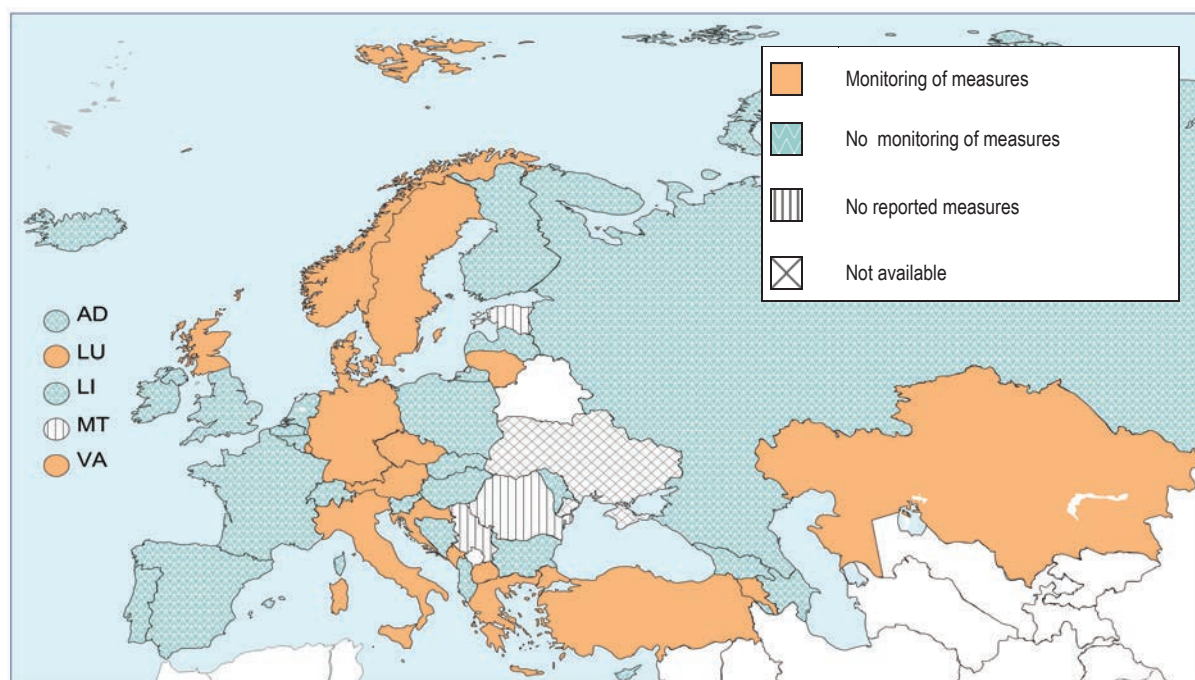
There are also measures for improving curriculum organisation, some countries mentioning the inclusion of mobility windows in study programmes. In Germany, the Accreditation Council made mobility a main topic in its strategic planning for 2013 to 2017. The aim is to identify and if possible remove any remaining obstacles to mobility in study organisation. In Finland, all higher education institutions should incorporate into all their degrees a module supporting internationalisation. Its realisation will be determined in personal study plans. The internationalisation module will be completed with mobility period or high quality international courses.

Finally, with regard to legal issues including visa arrangements, Italy, Croatia and Latvia mentioned recent measures to simplify legal frameworks and visa regimes for incoming students. Croatia reported that progress was made with the implementation of the Action Plan for Removing Obstacles and Enhancing International Learning Mobility for the period 2010 to 2012. Nevertheless, in many countries there are still efforts for optimising student mobility flows across the EHEA and beyond. Ideally, countries should adapt their visa and residence/work permit regulations in order to align them with their engagement towards internationalisation and mobility. This issue could be addressed in a comprehensive national internationalisation strategy.

Monitoring

While various measures are put in place to tackle obstacles to mobility across the EHEA, a minority of countries monitor their effects (see Figure 7.36).

Figure 7.37: Monitoring the effects of measures to tackle the obstacles to student mobility, 2013/14



Source: BFUG questionnaire

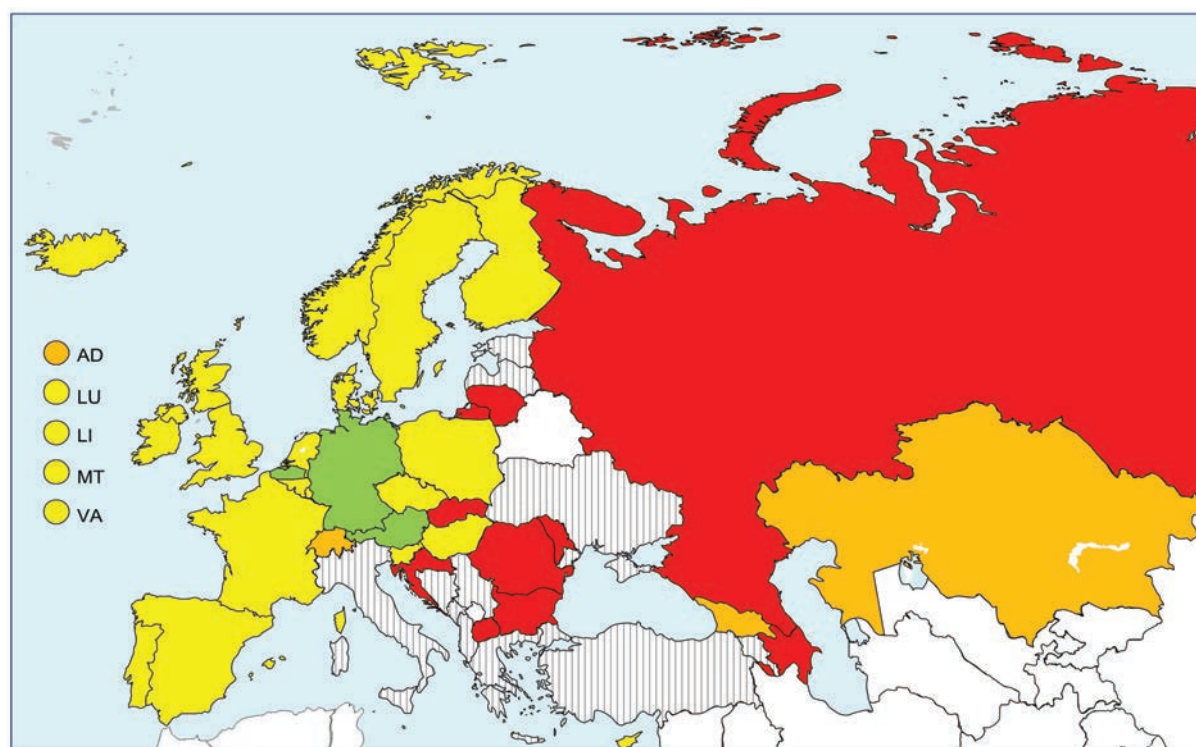
In some countries such as Belgium (Flemish Community), Spain and the United Kingdom (England, Wales and Northern Ireland) the implementation of a mobility strategy or action plan has started only recently and first outcomes have not been published yet. Countries that already undertake monitoring do so annually or biannually. Various institutions such as the ministries of education or other government agencies, quality assurance agencies, higher education institutions or national student unions could be involved in the monitoring process. Better monitoring would be needed to assess the efficiency of the adopted measures.

7.2.5. Mobility support for disadvantaged students

Student mobility also has a social dimension, as research shows that, without additional incentives and support, groups that are under-represented in the student population as a whole tend to be even further under-represented in the mobile student population. Figure 7.38 therefore shows to what extent financial support for mobility is provided for disadvantaged students. This may be achieved by a combination of mainstream student support and portability, or by targeting student support for mobility to disadvantaged students. The indicator also considers whether monitoring is undertaken on the impact of the support system for mobility on disadvantaged students.

The main message from this indicator is that, with regard to mobility, no country is currently providing support to disadvantaged students and monitoring the impact. (NB Further analysis to be added)

Figure 7.38: Scorecard Indicator ():Financial mobility support to disadvantaged students



Scorecard categories

- Financial mobility support targeted to disadvantaged students
OR Portable grants targeted at disadvantaged students
OR Portable mainstream grants with need-based allocation provided to more than 50% of students**;
 Systematic monitoring of disadvantaged students in mobility.;
- Financial mobility support targeted to disadvantaged students
OR Portable grants targeted at disadvantaged students
OR Portable mainstream grants with need-based allocation provided to more than 50% of students;
 Ad hoc monitoring of disadvantaged students in mobility.
- Financial mobility support targeted to disadvantaged students
OR Portable grants targeted at disadvantaged students
OR Portable mainstream grants with need-based allocation provided to more than 50% of students;
 No monitoring of disadvantaged students in mobility.;
- No targeted support for mobility provided to disadvantaged students;
 Support with need-based allocation provided to some, but less than 50% of students;
 No monitoring.
- No support provided to disadvantaged students for mobility.*

Source: Eurydice

Note

- 11 countries are considered non applicable because less than 10% of the student population receive grants and/or loans.

7.2.6. International staff mobility

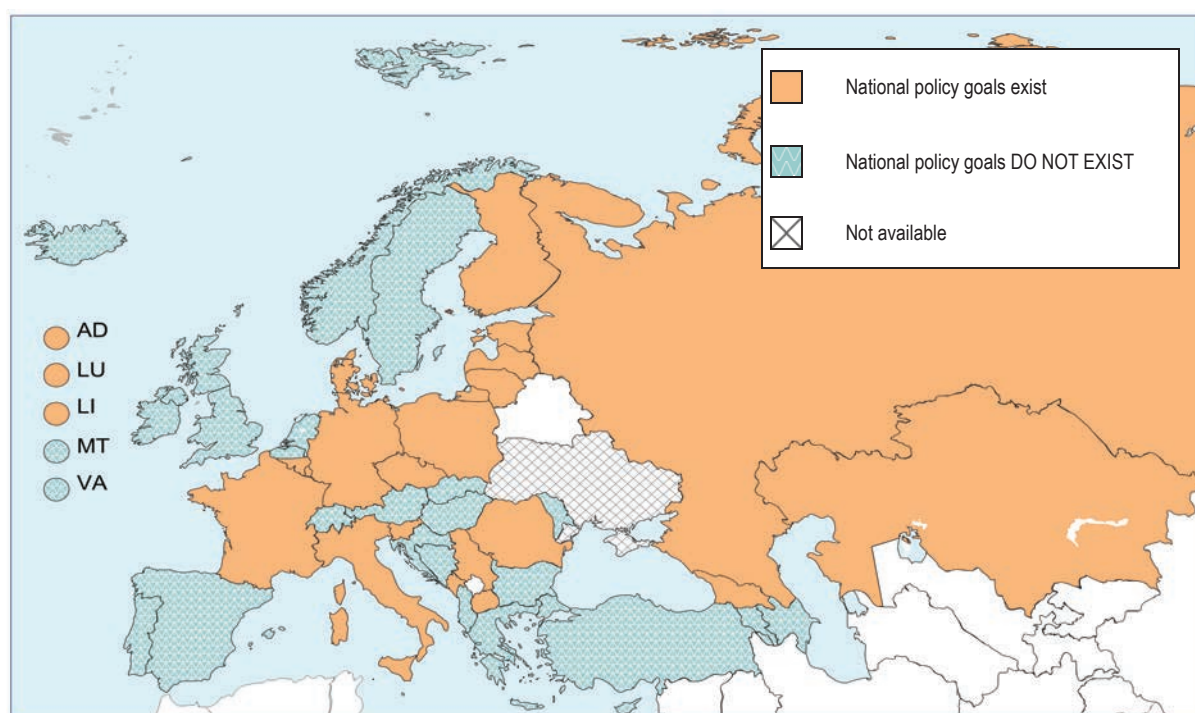
Staff mobility has become a common feature of the higher education landscape in the EHEA and beyond. However, there is still no definition of the concept of staff mobility at European level ⁽³¹⁾ and the current state of data collection does not allow assessing mobility flows.

Similarly to student mobility, staff mobility is a complex topic and several elements need to be taken into account when designing policies, guidelines or strategies: the direction of mobility flows (outward or inward), the length of mobility periods (short or long term), the categories of staff, that is, academic staff (mostly teachers and researchers, but to some extent doctoral candidates ⁽³²⁾), technical and administrative staff (including international officers and guidance counsellors, for example). In addition, the purpose for periods spent abroad is essential to be taken into account in order to categorise staff mobility. For example, academic staff may be mobile to participate in international conferences, for study visits, for periods of teaching or academic exchange, for a sabbatical with defined objectives, etc. (European Commission/EACEA/Eurydice 2013, pp.1-2).

National policy goals for staff mobility

While there seems to be general policy support for mobility, including staff mobility, less than half of EHEA higher education systems have defined specific national policy goals that explicitly seeking to promote staff mobility in higher education (see Figure 7.37).

Figure 7.39: National policy goals explicitly aimed at promoting staff mobility, 2013/14



Source: BFUG questionnaire

The national policy goals are sometimes very general in character, for example stating in law that the mobility of students and academic personnel is encouraged. Other countries have developed more detailed national policy goals. For example, in the Czech Republic, the Ministry of Education, Youth and Sports has included mobility of academic staff (incoming and outgoing) in public higher education institutions as a priority in its Strategic Plan. It envisages programmes supporting staff mobility as well

⁽³¹⁾ Recent deliberations of the Working Group on Mobility and Internationalisation have led to a suggested definition of staff mobility.

⁽³²⁾ Doctoral candidates might not always be employed by the university but treated as students, in which case their mobility would not count as staff mobility (see Figure 4.30 Status of doctoral candidates).

as creating suitable conditions for the permanent employment of foreign experts. The Strategic Plan also contains recommendations to higher education institutions. They are advised to support two-way international mobility of researchers and academic staff, with long-term mobility forming part of the path to successful career progression, while for other (administrative) staff, mobility should also become a normal expectation.

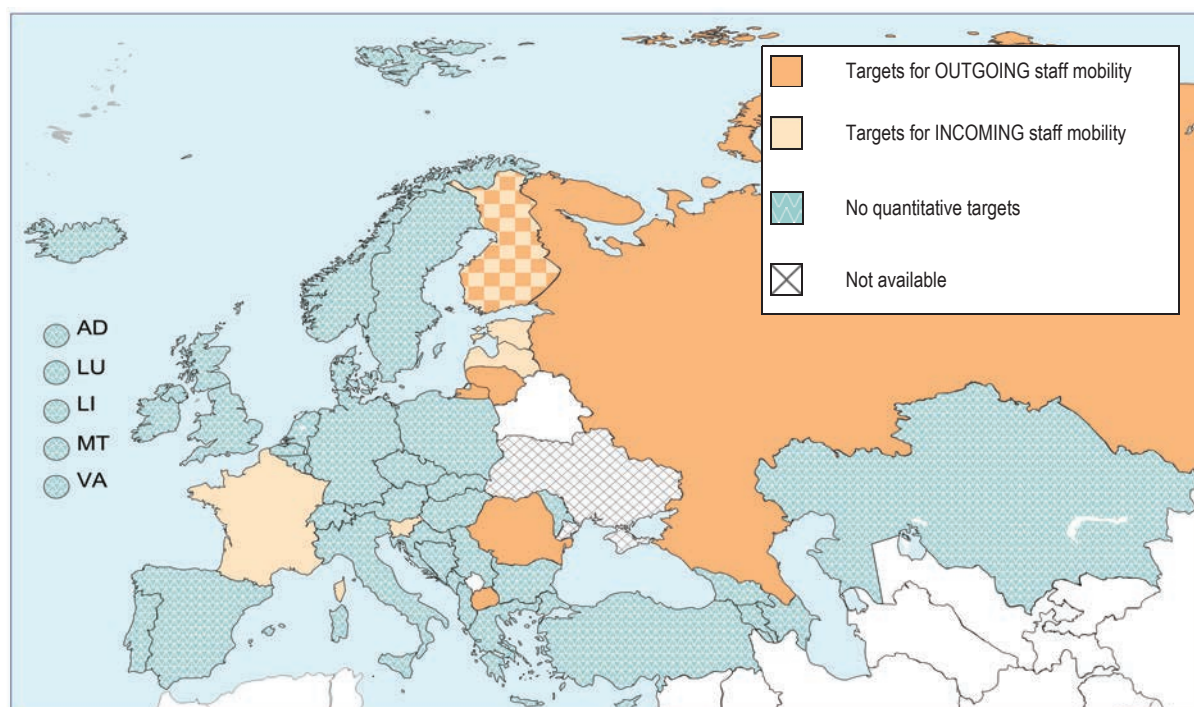
In Luxembourg, the government encourages international scientific collaboration and the mobility of researchers. It aims to increase the participation of Luxembourg's higher education staff in programmes and initiatives for scientific and technological cooperation at European level and wider international context. In Germany, goals refer to expanding international research cooperation and establish a culture that welcomes staff not only at institutional level but also in the overall social environment. Thus a number of other societal structures are considered in the strategic goals (e.g. consulates, foreign office authorities, job centres, childcare institutions, etc.).

In some cases policy goals are more concrete with quantitative targets and detailed objectives. The countries where staff mobility goals include quantitative targets are Estonia, Finland, the former Yugoslav Republic of Macedonia, France, Lithuania, Romania, Russia and Slovenia.

Target setting

The vast majority of countries do not have any clear quantitative targets regarding staff mobility, whether it be for incoming or outgoing mobility (see Figure 7.38). When they exist, quantitative targets mostly concern teaching staff or, to a lesser extent, researchers (doctoral candidates in very few cases), and they are formulated either in terms of stating a percentage of academic staff that should be mobile, or in terms of a targeted increase of this percentage to be achieved in the future. It is likely that the adoption of a definition at European level would help countries to define targets.

Figure 7.40: Quantitative targets for staff mobility, 2013/14



Source: BFUG questionnaire

Regarding outgoing staff mobility, the Higher Education Act in the former Yugoslav Republic of Macedonia stipulates that, on a yearly basis, at least 3 % of the professors of any higher education institution should act as visiting professors in another foreign higher education institution. In this case, however, it should be borne in mind that neighbouring states that were formerly also part of Yugoslavia may easily account for this percentage of research and teaching cooperation. The share of Lithuanian teachers who are taking part in the Erasmus mobility programme is defined at 10 % for 2020 by the Action Plan for Promoting the International Dimension in Higher Education (in 2013/2014, approximately 6 % of Lithuanian teachers participated in the Erasmus mobility programme). The annual Working plans of the National Agency for Community programmes in Romania foresee an increase of 5 % per year in the number of outgoing staff under Erasmus (in 2012/2013, there were 2443 outgoing university staff (academic and non-academic) with the Erasmus; in 2013/2014 there were 2963, - an increase of 21%).

Russia is a particular case, as its target does not differentiate between international and internal mobility (mobility within Russia). The 2011-2015 Federal Target Programme of Education Development states that the share of teachers at higher education institutions involved in inter-university cooperation and in research at other institutions should change from the baseline value of 5 % (as per 2010 year-end) to the target value of 52 % (2015 year-end). This dramatic increase indicates a strong will for greater mobility in higher education, both at national and international levels.

With regard to incoming staff mobility, Estonia aimed at reaching 3 % of foreign staff in permanent teaching positions, while in France the share of foreign professors or « researcher-teachers » among newly recruited staff should reach 20 % by 2015 (14 % in 2013). The target in Slovenia is to include at least 10 % of foreign teachers, staff and researchers in higher education by 2020, while in Latvia, the Law on Higher education institutions stipulates that at least 5 % foreign visiting professors should be teaching in higher education institutions as of September 2014. When the data was collected the rate was 4 %.

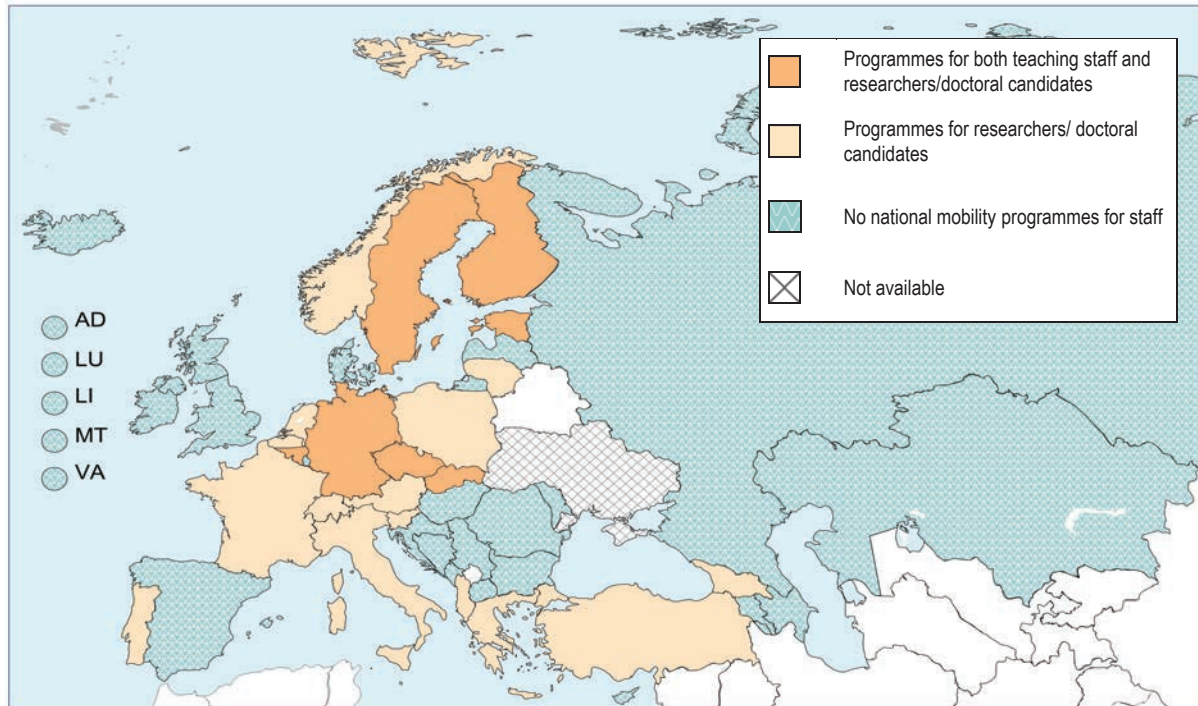
Finland has defined targets for both incoming and outward staff mobility. By 2015, the proportion of outgoing university teachers and researchers is defined as 29 %, while outgoing staff in polytechnics should reach 62 % of all teaching and expert staff. The target for incoming teachers and researchers in university is defined to 29 %, whereas incoming staff in polytechnics should reach 47 %.

Finally, some countries have defined general qualitative targets. In Austria, universities are encouraged to increase their foreign staff ratio (incoming mobility) in the framework of internationalisation at home and the performance agreements. Similarly, Italy aims to increase both incoming and outward staff mobility.

National mobility programmes for staff mobility

While offering incentives or programmes for attracting foreign staff to national higher education institutions could almost be considered as a 'normal' practice, it is a less obvious for countries to encourage its higher education staff to go abroad. Figure 7.39 focuses on national programmes for outward staff mobility. It shows that roughly half of the countries have national mobility programmes to support national staff for going abroad.

Figure 7.41: National outward mobility programmes for staff, 2013/14



In most cases, such programmes exist to support the mobility of researchers. Mobility is often financed by national research councils or foundations. For example, Albania's Agency for Research, Technology and Innovation offers a programme enabling new researchers to attend PhD trainings in each of the 27 EU countries. In Austria, the Erwin Schroedinger Fellowships program enables young scientists in Austria to work abroad at leading research institutions and programmes in order to gain international experience.

The Swiss National Science Foundation (SNSF) with its career funding schemes also focuses on researchers including early and advanced postdoctoral fellows and doctoral candidates. Within the scope of a project, researchers can apply for a fellowship or salary for themselves and – depending on the funding scheme – for further funding to carry out their project. For example, the International Short Visits scheme is aimed at researchers in Switzerland who wish to go abroad for a short period or for researchers abroad who wish to collaborate with counterparts in Switzerland. During the visit, which may last from one week to three months, they pursue a small joint research project. There are no geographical or subject-specific restrictions.

A smaller number of national mobility programmes are targeting teachers. Belgium (French Community) offers a programme for teachers and researchers for projects in Latin America. In Finland, mobility of teaching staff is funded by CIMO programmes: FIRST for exchange with Russia, the CIMO China programme, and North-South-South programme for cooperation with developing countries. In Germany, various grant programmes exist for both incoming and outgoing mobility administered by DAAD. They are available to teachers, but also to researchers and doctoral candidates.

Beyond these examples, only Belgium (French Community) and Finland have provided evidence of having national mobility programmes for other types of staff, such as administrative or technical staff. Indeed, funding mobility of this type of staff seems to come almost exclusively from Erasmus programmes.

In some countries staff mobility has been made possible with European programmes such as Erasmus Plus or regional programmes such as CEEPUS. Several countries also mention that staff mobility is funded in the framework of bilateral or multilateral agreements with specific countries. In some cases individual higher education institutions can also offer programmes.

Information on participation rates

Less than half of the EHEA countries reported on collecting information on participation rates with regard to the main mobile groups of staff, namely researchers, teachers and doctoral candidates. Evidence of collecting information on participation rates among other groups such as administrative or technical staff is rare. In countries where information on participation is collected, data is often collected either by the authority in charge of administering mobility programmes in ministries, by foundations/organisations funding research, or by national agencies. In some cases collected data are made public and disseminated in reports and on specific websites.

Countries such as Azerbaijan, Croatia, Iceland, Liechtenstein and Serbia reported that the information is collected by the higher education institutions individually. In Liechtenstein, there is no obligation to publish the information or to forward results to national authorities. In some cases data collection is the responsibility of several bodies (e.g. higher education institutions and other national institutions). In very rare cases, national offices of statistics (Italy and Moldova) or quality assurance agency (Italy) also collect data on staff mobility.

Some countries report on other bodies collecting data on staff mobility such as national agencies in charge of European programmes such as Erasmus Plus and Euraxess. Overall, however, a lack of attention to monitoring participation in staff mobility appears to be a common in EHEA countries. This situation might partly be due to issues of definition and also due to staff mobility being sometimes managed autonomously by higher education institutions.

Obstacles to staff mobility

The 2012 Report identified three main categories of obstacles perceived to be preventing staff from being mobile, namely language knowledge, legal issues and personal situation (European Commission/EACEA/Eurydice, Eurostat and Eurostudent 2012, p.171). Language knowledge was clearly the most important obstacle for both incoming and outward staff mobility.

For the current report, countries were asked to rank obstacles for incoming and outgoing staff mobility separately. As in most countries there are no surveys, studies or evaluations on obstacles to staff mobility, answers are based on countries' perceptions.

Lack of funding now seems to be the most important obstacle particularly for outgoing mobility, followed by administrative burden, language issues and lack of motivation among personnel. Other obstacles such as recognition and legal issues, immigration restrictions or incompatibility of pension and/or social security systems were also cited, but they are deemed to be slightly less important according to countries' perceptions. Regarding the two last topics, immigration restrictions seem to be a concern more often for non-EU countries, while the incompatibility of pension and/or social security systems appears to be mainly a preoccupation within the EU countries.

Countries also report on other obstacles for outgoing staff mobility, in particular the difficulty for staff to find time to fit a mobility period into their work programme, or the difficulty of identifying human resources to cover duties when staff go abroad.

With regard to incoming staff mobility, two types of obstacles dominate in countries' answers: the first is related to language issues and the second to lack of funding. The lack of assistance and support services for matters such as housing, schooling for children, employment for a spouse or partner are also among the reported obstacles for incoming staff mobility.

Measures to remove obstacles to staff mobility

Around half of the EHEA countries reported having measures for tackling obstacles to staff mobility, for both incoming and outward staff mobility. Distinction between categories of staff is rarely made, but measures targeting the mobility of teaching and research staff seem to dominate. The most often cited measures are the provision of grant schemes/financial incentives, the provision of language training for both incoming and outgoing mobility, measures to ease visa and immigration procedures and the promotion of mobility opportunities/provision of counselling services. Measures to facilitate recognition procedures were less often mentioned, while very few countries mentioned measures for assisting accompanying family members, for example. Among the latter, the Slovenian government aims to introduce supplementary support mechanisms for foreign experts such as assistance with childcare or accommodation.

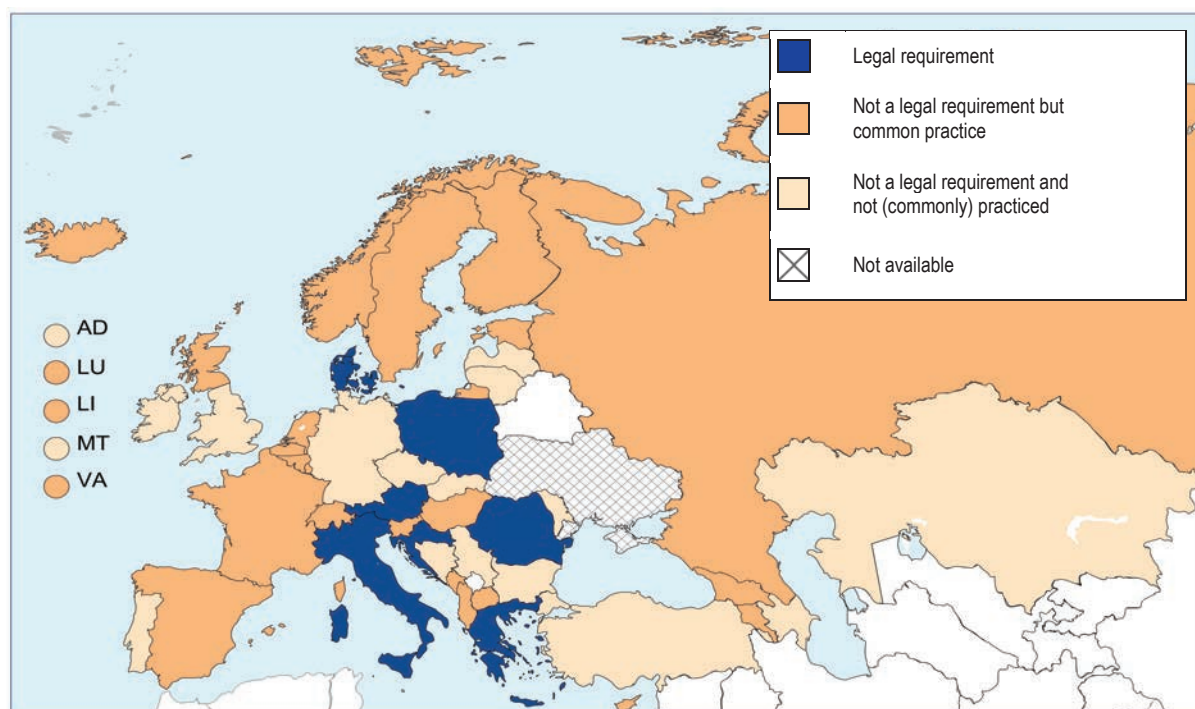
Facilitating the granting of visas is crucial for staff mobility (as well as student mobility) and some countries have made advancements. A European initiative adopted in 2013, the European Scientific Visa, is also worth mentioning as a recent development. It applies in all Schengen states, and aims to facilitate visa procedures for researchers intending to reside in EU countries. This initiative paves the way for further advancements in optimising mobility flows, but there is still work to be done on this issue.

Regarding the promotion of mobility opportunities, the United Kingdom (England, Wales, and Northern Ireland) combines diverse means, such as a dedicated campaign and website, specific promotion events, posters and leaflets and targeted emails. Previously mobile staff is also used as ambassadors. In Luxemburg, efforts are made to better inform on mobility benefits.

The provision of a unique website which provides information about all international mobility schemes for staff is also a way to respond to the lack of information. In the previous report, countries reported that the provision of information for employees interested to make use of opportunities to work abroad was generally insufficient (European Commission/EACEA/Eurydice, Eurostat and Eurostudent 2012, p.172). This situation has not changed much since then. Indeed, the information about staff mobility opportunities seems to be either non-existent or scattered in different websites. Some countries have one or several websites, but they do not cover all opportunities (incoming and outgoing mobility, all types of staff). However, there are some European websites giving access to information and support services to certain types of staff. For example, Euraxess provides information for researchers wishing to pursue their research careers in Europe.

Publishing vacancies for academic staff in media abroad is another way of promoting staff mobility. It appears that it is a common practice in the majority of EHEA countries (see Figure 7.40). In some cases it publishing vacancies is a legal requirement (Austria, Croatia, Denmark, Greece, Italy, Poland and Romania). In most cases it is a common practice, without being mandatory. At the same time, almost 20 education systems reported that publishing academic vacancies in media abroad is not required and would be very unusual.

Figure 7.42: Legal requirement to publish vacancies in foreign media, 2013/14



Finally, rewarding mobile staff can be another means for removing obstacles to staff mobility. A certain number of countries reported on reward mechanisms at institutional level, but these kinds of rewards seem to be rare at national level.

The most common mechanism is related to career development. For instance, in Denmark, the new collective Agreement for University Colleges and the Academies for professional higher education states that in order to qualify for a position of lecturer, academic staff have to demonstrate international competences, while the Strategic Plan of the Czech Ministry of Education, Youth and Sports recommends to higher education institutions that long-term mobility should be part of career progression for academic staff. In Slovenia, one of the conditions for the appointment to the title of university teacher, researcher and associate is the involvement in an international activity (at least 3 continuous months at a foreign university or research institute).

Other mechanisms such as financial benefits seem to be less common across the EHEA. Where they exist, they are predominantly provided in the form of grants or others types of financial incentives. Some countries reported also on non-financial benefits such as recognition by higher education leaders or the possibility to be excused from some types of task at work.

There is no mention of rewards for the mobility of administrative and technical staff.

Monitoring

Systematic monitoring of the impact of the measures to remove obstacles to staff mobility is missing in most countries. When it exists, monitoring is usually conducted annually or biannually by ministries (education, research), quality assurance agencies, national agencies in charge of the higher education internationalisation and/or higher education institutions individually.

Conclusions

EHEA countries present very different situations with regard to internationalisation and mobility, especially when looking at their individual mobility flows and the level of engagement in internationalisation activities.

Most countries encourage the internationalisation of higher education through their steering documents. However, more than half of them lack a national internationalisation strategy and provision of guidance for the various stakeholders involved in the internationalisation process. Higher education institutions in many countries also lack a comprehensive internationalisation strategy, although they are increasingly engaged in internationalisation activities such as joint programmes/degrees, MOOCs and cross-border cooperation in research. Many countries have not adopted national quantitative targets for different forms of mobility.

There is no doubt that the trend for internationalisation is growing, and that this offers great potential for higher education institutions in the EHEA. However, lack of funding as well as inflexible national legal frameworks may hinder development in some countries.

Student mobility rates show slight increases since the 2012 report, but still only a minority of students benefit from such experience and underrepresented groups would need greater attention. There is considerable evidence of significant national actions to strengthen mobility, but monitoring, which would allow the assessment of these measures, is lacking in most countries.

Both the incoming and the outward degree mobility rates within the EHEA are below 5 % for the vast majority of countries with available data. When looking at degree mobility flows with non-EHEA countries (Australia, Canada, Japan, New Zealand and the United States), it appears that students from outside the EHEA make up more than 5 % of the total student population in only four countries, while in many this proportion is less than 1 %. Overall, the average rate of incoming degree mobile students (from EHEA and non-EHEA countries) is relatively low, reaching 4.4 % of total enrolments. This is a very small increase from 4% in 2008/09. The rate of outward mobility (students undertaking a degree in a non-EHEA country) is extremely low, the weighted average of the EHEA countries reaching only 0.33 %, a figure that has not change since 2008/09.

The concept of 'balanced' mobility is increasingly discussed, yet hardly any country can claim to have genuinely balanced degree mobility. Even when flows reach similar numbers, the countries of origin/destination differ significantly.

It is not possible at the moment to report accurately on whether the EHEA collective target of 20 % mobility by 2020 can be reached or not, as comprehensive and harmonised data collection is not yet fully in place – particularly for credit mobility.

Funding is perceived by ministries and students alike as the biggest obstacle to increased mobility. The portability of financial student support is clearly one important measure to address this concern, but only a minority of countries currently ensure full portability for their students.

Data limitations pose even more significant challenges in evaluating the current situation for staff mobility. There is no agreed operational definition of staff mobility, which would be necessary to be able to set proper quantitative targets and collect data on participation rates. 'Staff' is not a homogenous group, and it would be important to distinguish obstacles to mobility by type of staff mobility in the future.

For both student and staff mobility, it will be essential to focus not only on numbers, but also on the quality of mobility. This implies investing in information services, monitoring experience, ensuring that recognition and evaluation processes operate fairly, and making changes in light of experience. Improved monitoring of the impact of measures taken to remove obstacles to mobility will also be crucial if optimal mobility flows are to be achieved.

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