

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 5A¹) 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 population of students: 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.

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

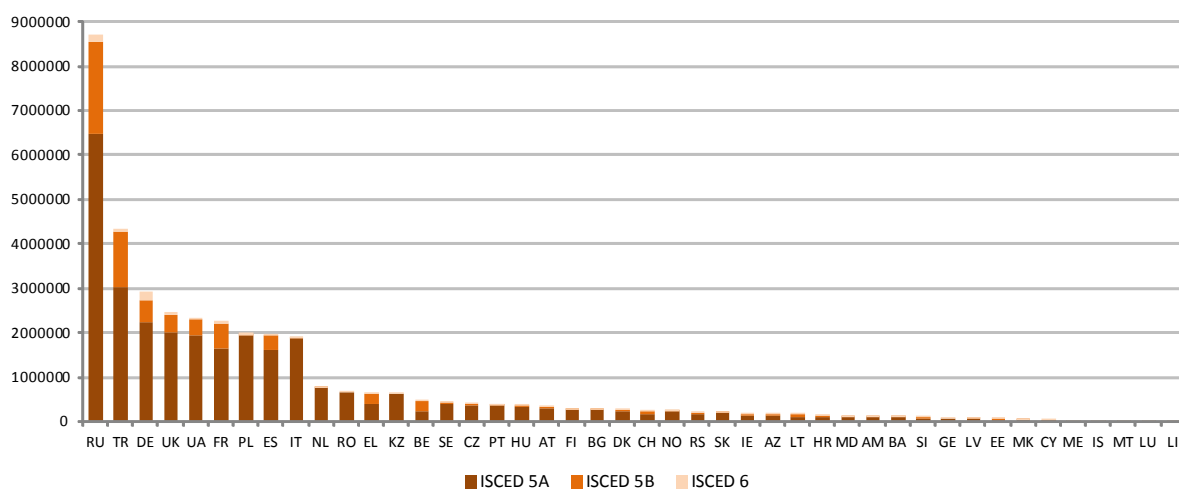
¹ When the source of the data is Eurostat, ISCED refers to the ISCED97 classification.

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

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).

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 %. 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.

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	EL	KZ
TOTAL	8732579	4353542	2939463	2495780	2347380	2296306	2007212	1965829	1925930	793678	705333	663698	629507
ISCED 5A	6490002	3031232	2240603	2010039	1954789	1649057	1953696	1621895	1887038	765252	681515	415773	627919
ISCED 5B	2081736	1270351	490360	390792	356768	576668	13253	321392	4263	15884	:	224478	:
ISCED 6	160841	51959	208500	94949	35823	70581	40263	22542	34629	12542	23818	23447	1588
Number	BE	SE	CZ	PT	HU	AT	FI	BG	DK	CH	NO	RS	SK
TOTAL	477712	453328	440230	390273	380757	376498	308924	284995	275009	269573	238224	231661	221227
ISCED 5A	228327	404482	381255	370972	331455	310011	288645	264082	232820	191844	229135	178789	206231
ISCED 5B	235217	27494	32870	74	42048	40436	84	16210	33230	55717	871	47322	2851
ISCED 6	14168	21352	26105	19227	7254	26052	20195	4703	8959	22012	8218	5550	12145
Number	IE	AZ	LT	HR	MD	AM	BA	SI	GE	LV	EE	MK	CY
TOTAL	192647	184834	175066	157289	124784	120733	115907	104003	99376	97041	67607	63318	31772
ISCED 5A	143937	147774	122414	104656	105588	106855	115036	82781	95110	77697	43765	60940	22604
ISCED 5B	39780	35978	49777	49398	17321	12779	659	17124	:	16821	20791	1921	8458
ISCED 6	8930	1082	2875	3235	1875	1099	212	4098	4266	2523	3051	457	710
Number	ME	IS	MT	LU	LI								
TOTAL	25313	19099	12203	6085	960								
ISCED 5A	20690	18388	10498	4320	854								
ISCED 5B	4532	259	1628	1375	:								
ISCED 6	91	452	77	390	106								

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

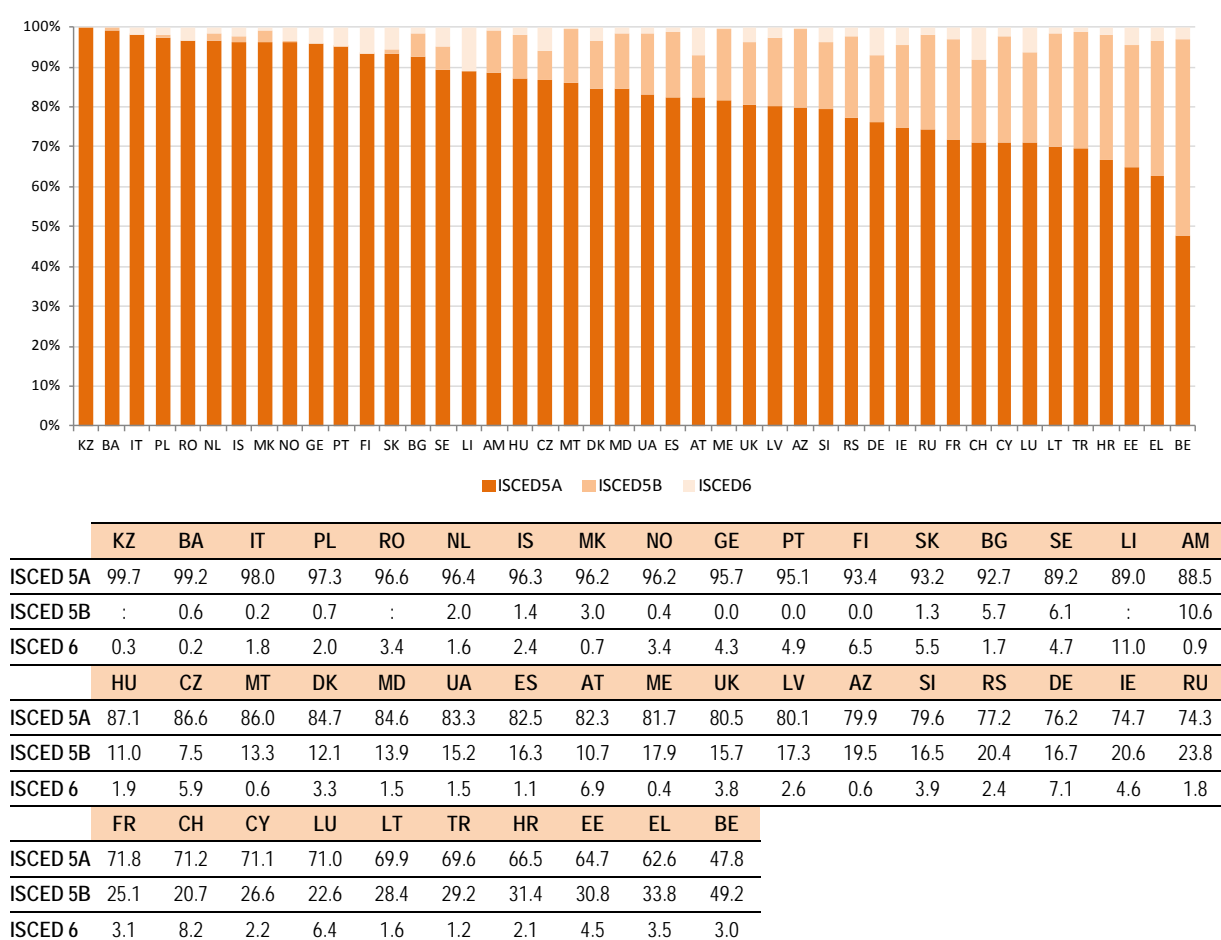
Source: Eurostat, UOE and additional collection for the other EHEA countries.

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



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

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.

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

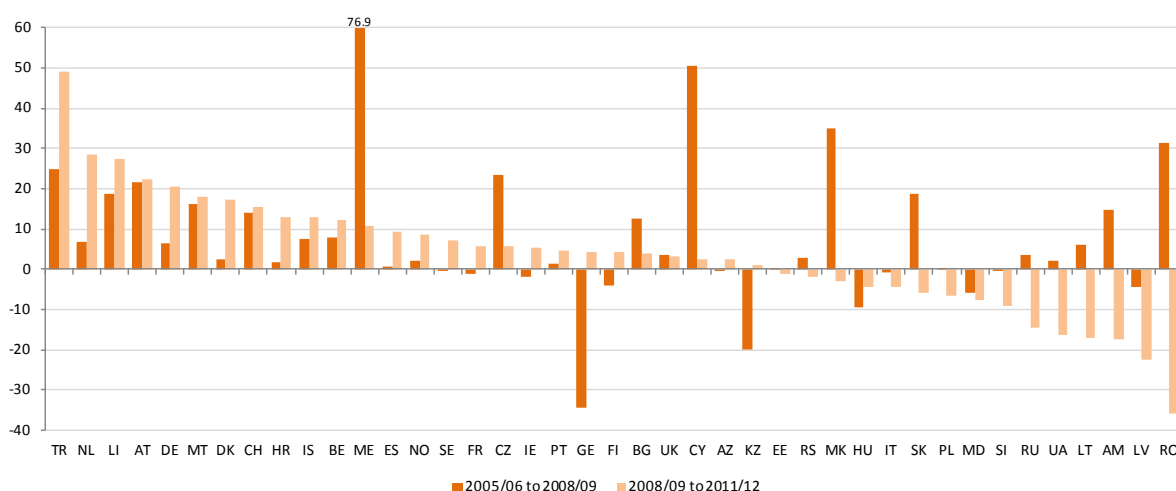
EHEA countries show a mixed picture when looking at the changes in the total student population during the periods between some of the recent key milestones of the Bologna process (i.e. between 2005/06 and 2008/09 and between 2008/09 and 2011/12) as well as when considering this entire time period. Changes 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 period of time. Overall, the decline of the student population range between 5 % in Italy and 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 2692 students in 2006 to 6085 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.

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



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

	TR	NL	LI	AT	DE	MT	DK	CH	HR	IS	BE	ME	ES	NO	SE	FR	CZ
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	-1.3	23.5
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	5.7	5.6
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	4.3	30.5
	IE	PT	GE	FI	BG	UK	CY	AZ	KZ	EE	RS	MK	HU	IT	SK	PL	MD
2005/06 to 2008/09	-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	-0.9	18.7	0.2	-6.0
2008/09 to 2011/12	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	-4.3	-5.9	-6.6	-7.7
2005/06 to 2011/12	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	-5.1	11.8	-6.5	-13.2
	SI	RU	UA	LT	AM	LV	RO	EL	LU								
2005/06 to 2008/09	-0.4	3.4	2.1	6.0	14.6	-4.4	31.5	:	:								
2008/09 to 2011/12	-9.1	-14.4	-16.1	-16.9	-17.2	-22.6	-35.8	:	:								
2005/06 to 2011/12	-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 that is 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 2013⁵). Furthermore, the enrolment rate is impacted by the duration of programmes and the actual time spent in higher education study. Countries with a shorter average study duration would have a lower enrolment 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 one fourth 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 %.

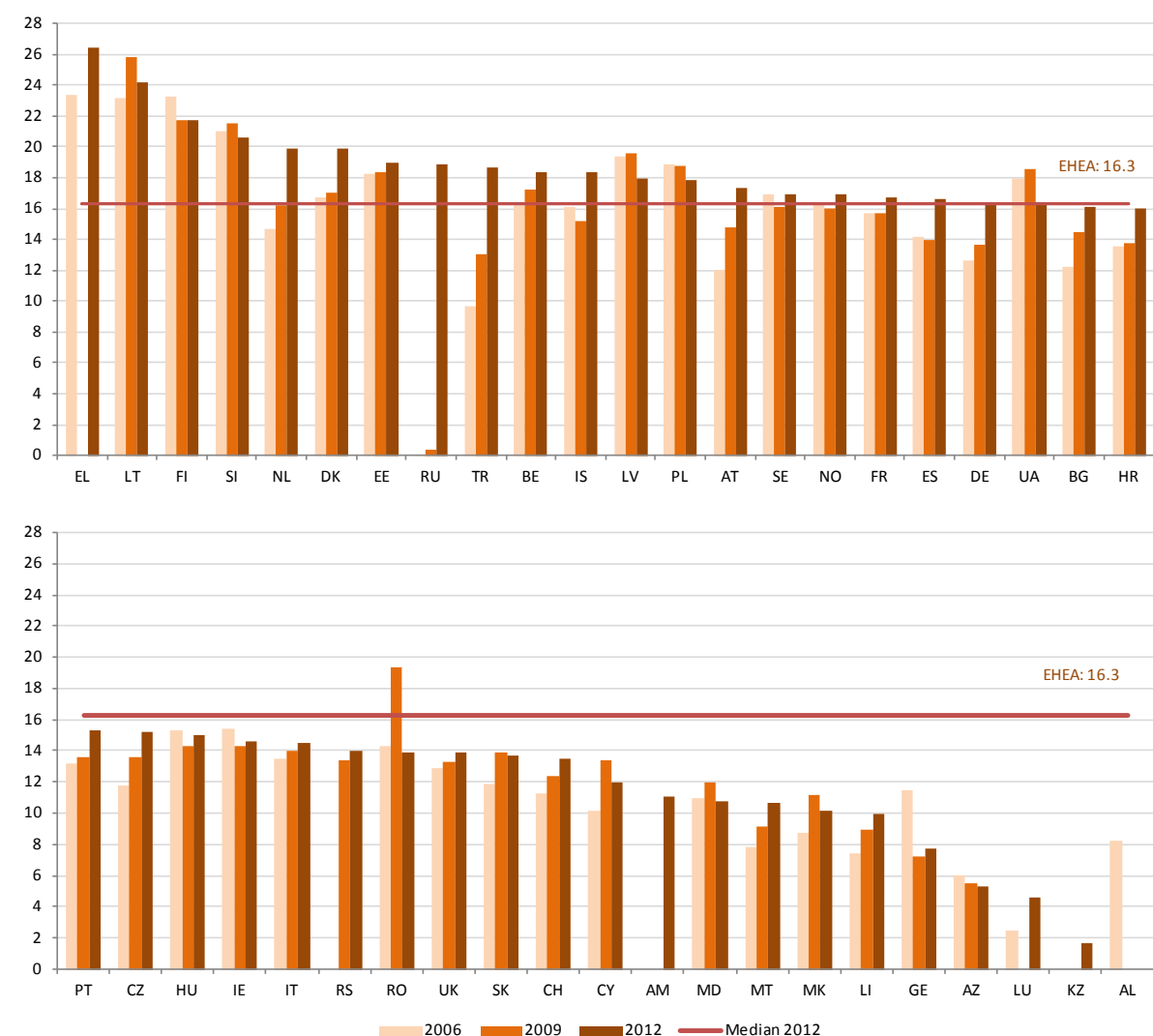
Enrolment of 18-34 years old as a percentage of the population of the same age group, increased in 2012 compared to 2006 and 2009 in half of the countries for which data is available. This confirms the trend towards the development of tertiary education in some countries complemented, for some of them, 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

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

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.

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	NO	FR
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	16.4	15.7
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	16.0	15.7
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	16.9	16.7
	ES	DE	UA	BG	HR	PT	CZ	HU	IE	IT	RS	RO	UK	SK	CH	CY	AM
2006	14.2	12.7	18.0	12.2	13.5	13.2	11.8	15.3	15.5	13.4	:	14.3	12.8	11.9	11.3	10.2	:
2009	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	13.9	12.4	13.4	:
2012	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	13.7	13.5	12.0	11.1

	MD	MT	MK	LI	GE	AZ	LU	KZ	AL
2006	11.0	7.9	8.8	7.4	11.5	6.0	2.4	:	8.2
2009	12.0	9.1	11.1	9.0	7.2	5.5	:	:	:
2012	10.8	10.7	10.2	10.0	7.7	5.3	4.6	1.6	:

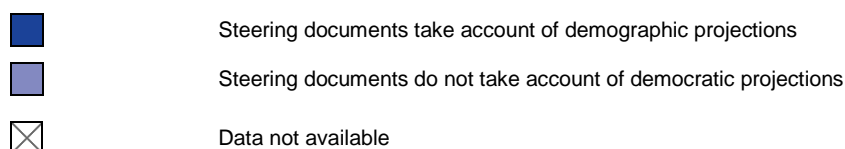
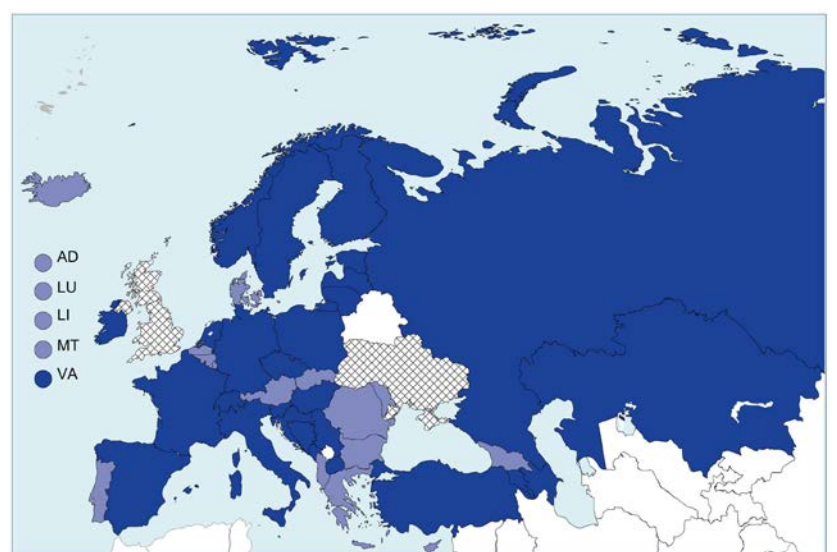
Notes: [To be included]. Countries are sorted by enrolment rate in academic year 2011/12.

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

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.

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.

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



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.

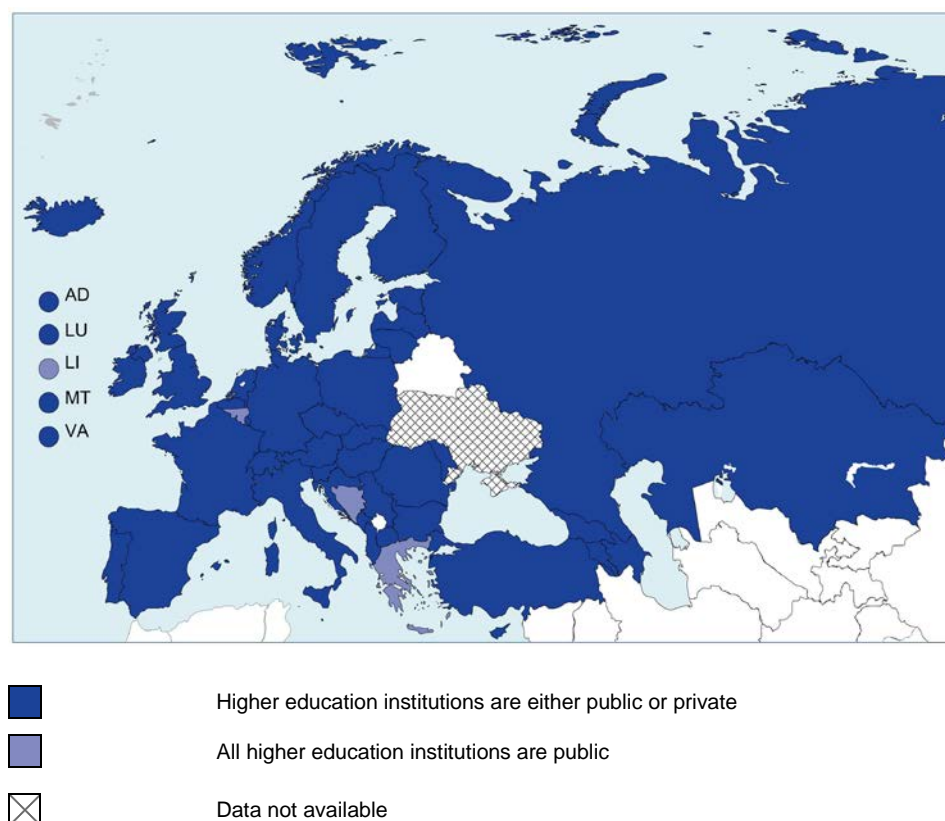
While higher education institutions can be academically or professionally oriented, this distinction is increasingly not clear-cut. In many countries, old differences between academically and professionally oriented institutions still exist formally, but – partly due to the Bologna Process – actual differences 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.

Figure 1.6 shows in which countries the distinction between public and private institutions applies. As the figure shows, 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).

Figure 1.6: Types of higher education institutions: public or private (source of funding), 2014/15



1.3. Public expenditure on higher education

European higher education institutions are funded predominantly by public sources. It is thus relevant to compare public expenditure on higher education in the EHEA. This section is devoted to such a comparison 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 which provide education-related services including entities administering education (e.g. ministries or department of education), entities 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 monitors the country's public financial effort in supporting its higher education system in relation to the strength of the country's economy.

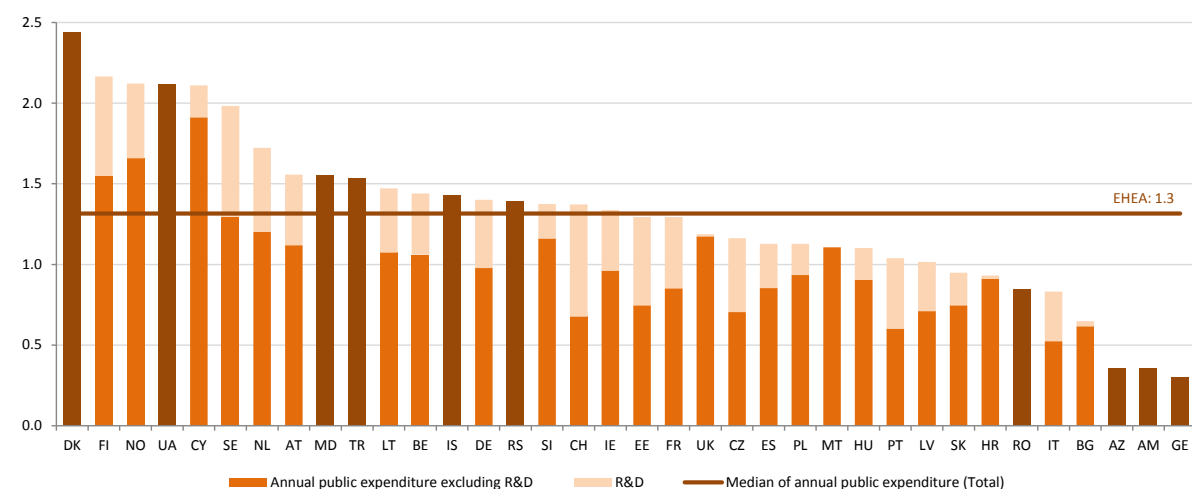
Thus, apart from expenditure on educational core goods and services (i.e. expenditure that is directly related to instruction and education e.g. expenditure on teachers, university and institutions' buildings, teaching materials, etc.), annual public expenditure also includes all expenditure on research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

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 %) 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.

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



	DK	FI	NO	UA	CY	SE	NL	AT	MD	TR	LT	BE	IS	DE	RS	SI	CH
TOTAL	2.44	2.17	2.12	2.12	2.11	1.98	1.72	1.56	1.56	1.54	1.47	1.44	1.43	1.40	1.39	1.37	1.37
R&D	:	0.62	0.46	:	0.20	0.69	0.52	0.44	:	:	0.40	0.38	:	0.42	:	0.21	0.70
	IE	EE	FR	UK	CZ	ES	PL	MT	HU	PT	LV	SK	HR	RO	IT	BG	AZ
TOTAL	1.34	1.29	1.29	1.19	1.16	1.13	1.13	1.11	1.10	1.04	1.01	0.95	0.93	0.85	0.83	0.65	0.36
R&D	0.38	0.55	0.44	0.01	0.46	0.27	0.19	0.00	0.20	0.44	0.30	0.20	0.02	:	0.31	0.03	:
	AM	GE															
TOTAL	0.36	0.30															
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.

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 that allocate the highest share of their public expenditure to tertiary education 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).

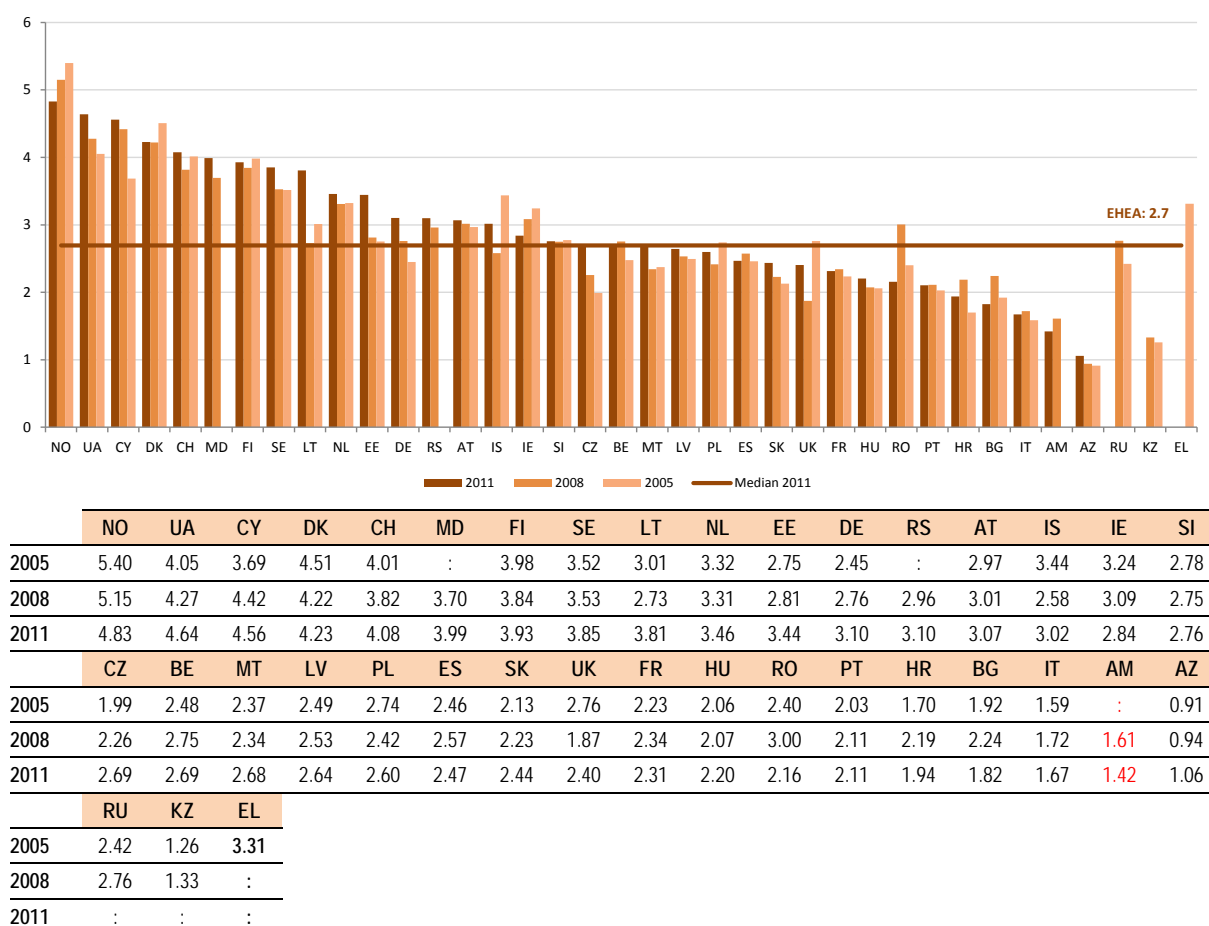
In the first group of EHEA countries (i.e. nearly half of the countries for which data is available) the percentage of total public expenditure devoted to tertiary education is higher in 2011 than in 2005. In these countries, annual public expenditure on tertiary education increased faster than the total 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 a 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 amounts 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



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, indicators presented so far on public funding do not reflect the most recent effects of the economic crisis, although it already had a significant impact on the levels of public funding before 2012. 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. In some countries and for some years, public expenditure on tertiary education at the current price increases while the “price index of individual consumption expenditure of general government” increases to a greater proportion. This leads to a decrease in public expenditure on education at a constant price – although this reality may be difficult to interpret in terms of policy making. Indeed, the preparation of the draft budget usually makes use of assumptions about expected economic developments and important economic variables including the inflation rate. The decrease in public expenditure on tertiary education at a constant price might simply be caused by incorrect assumptions about the inflation rate when the public budget is prepared (e.g. forecasts of inflation were lower than effective inflation) and not by budgetary cuts.

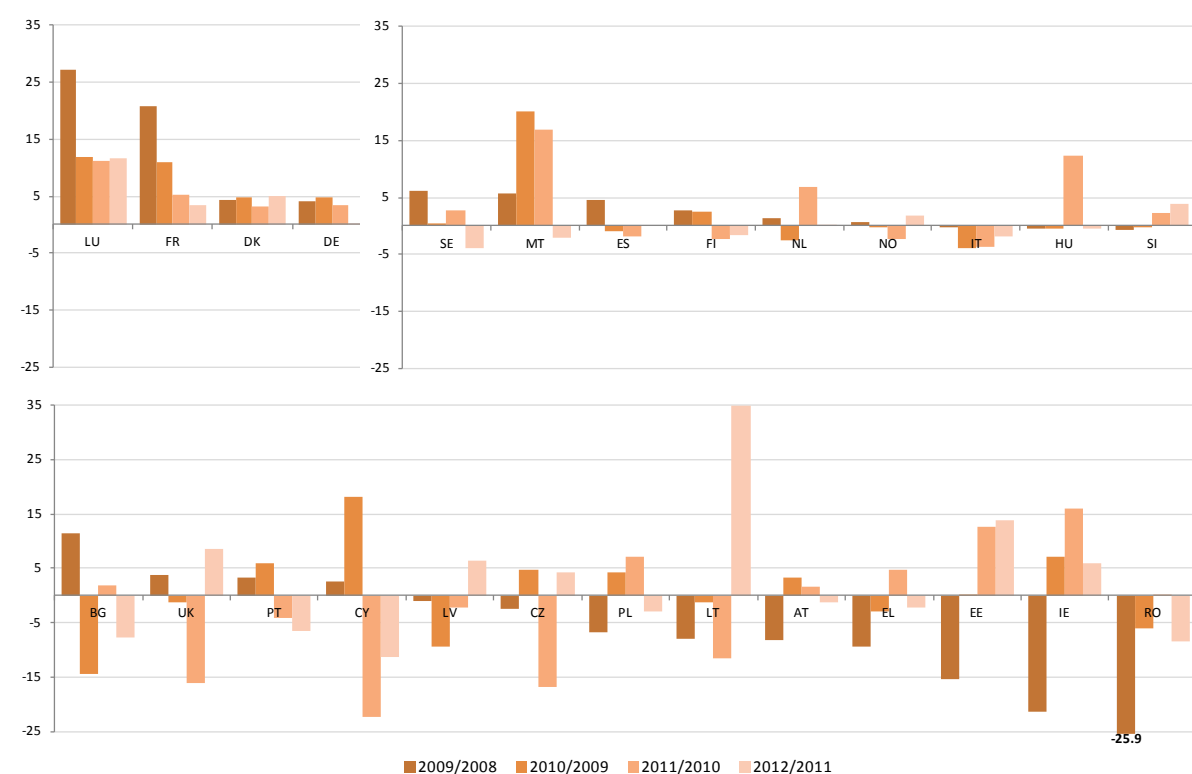
Within the EHEA, only four countries (Luxembourg, France, Denmark and Germany) did not record a decrease in public expenditure for tertiary education at a constant price in any of the years in the period 2008-2012. In Luxembourg (for which information on the financing of tertiary education is currently only available through data compiled in accordance with the classification on COFOG), 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 two digits 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 (at a constant price) directed to tertiary education were relatively small, and never exceeded 5 %. These decreases in expenditure at a constant price were usually preceded by relatively greater increases (e.g. Sweden, Spain, Finland) or

offset by subsequent growth (e.g. the Netherlands, Slovenia). Among this group of countries, Italy is the only one that recorded four consecutive decreases in public expenditure on tertiary education (constant price). According to the COFOG data, the level of public expenditure in tertiary education in 2012 was 9.4 % below that in 2008 at constant price. At the other extreme, in Malta, the level of such expenditure increased by 45 % when comparing the two years.

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 a constant price.

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	BG	UK	PT	CY
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	11.5	3.8	3.4	2.6
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	-14.4	-1.2	5.9	18.2
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	1.8	-16.1	-4.1	-22.3
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	-7.7	8.5	-6.6	-11.2
	LV	CZ	PL	LT	AT	EL	EE	IE	RO								
2008-2009	-1.1	-2.4	-6.7	-7.9	-8.2	-9.5	-15.3	-21.3	-25.9								
2009-2010	-9.3	4.7	4.4	-1.2	3.4	-2.9	0.1	7.1	-6.0								
2010-2011	-2.3	-16.9	7.2	-11.5	1.6	4.8	12.6	16.0	0.2								
2011-2012	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).

Beside 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 organisation. Household's expenditure includes what they pay 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.

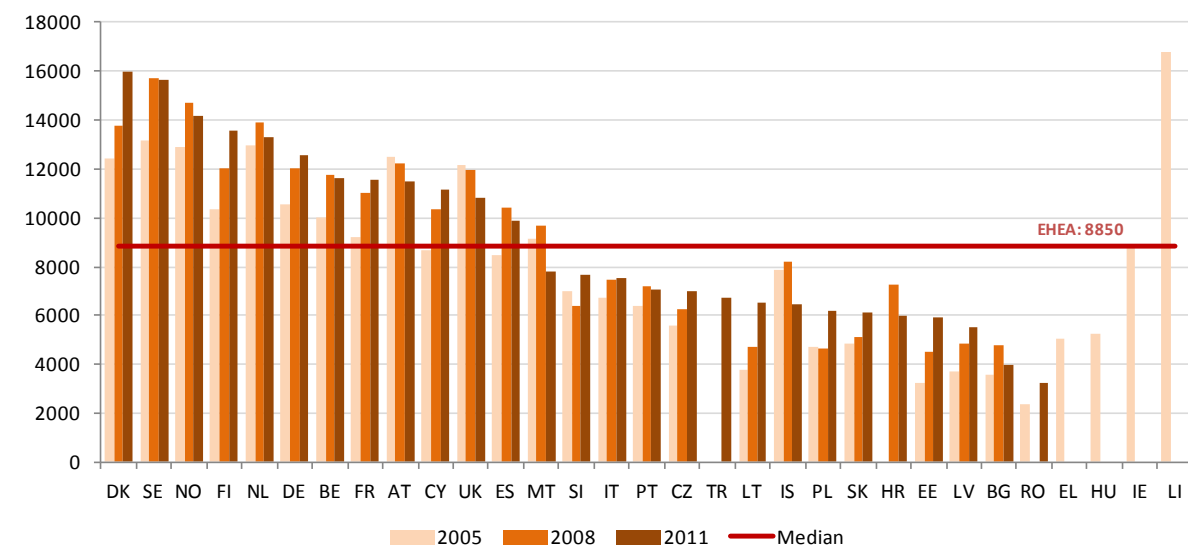
Looking at the total annual expenditure (both public and private) per student, it allows comparing the total financial investment of a country in relation to the size of the student population. In 2011, half of the EHEA countries spent more than PPS⁶ 8850 with a maximum of PPS 15 987 in Denmark while the other half of EHEA countries spent less with a minimum at PPS 3 255 (Romania). Thus, the EHEA shows wide disparities since the highest level of expenditure per full-time equivalent students 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 a number of 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 against the situation some years ago. The Baltic countries show the highest increase in annual expenditure per full-time student: in 2011, investment per full-time students increases by 80.8 %, 73.9 % and 48.6 % compared to 2005 in Estonia, Lithuania and Latvia respectively. Such increase may be the results of an increasing investment in tertiary education but might be amplified by a decrease or a slower growth of the population of student.

Romania increases its investment per full-time equivalent student by 37.1 % (in 2011 compared to 2005), which is among the highest growth in the EHEA area. In fact, Romania combined a strong decrease in the number of tertiary students (see Figure 1.3) with a decline of real public expenditure on tertiary education (see Figure 1.10). At the 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 decrease, expenditure per full-time student in Austria and the United Kingdom remains higher than PPS 10 000.

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

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



	DK	SE	NO	FI	NL	DE	BE	FR	AT	CY	UK	ES	MT	SI	IT	PT	CZ
2005	12396	13135	12916	10330	12948	10583	9987	9181	12476	8680	12172	8462	9124	7030	6755	6377	5597
2008	13787	15676	14705	12045	13897	12029	11725	11053	12258	10343	11926	10422	9672	6398	7457	7228	6240
2011	15987	15660	14172	13541	13309	12579	11599	11565	11504	11161	10832	9909	7792	7669	7515	7089	6995
	TR	LT	IS	PL	SK	HR	EE	LV	BG	RO	EL	HU	IE	LI			
2005	:	3757	7849	4732	4875	:	3280	3705	3561	2375	5043	5285	8872	16765			
2008	:	4741	8220	4622	5121	7295	4493	4856	4821	:	:	:	:	:			
2011	6712	6533	6478	6221	6147	6024	5929	5506	3998	3255	:	:	:	:			

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-term 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.

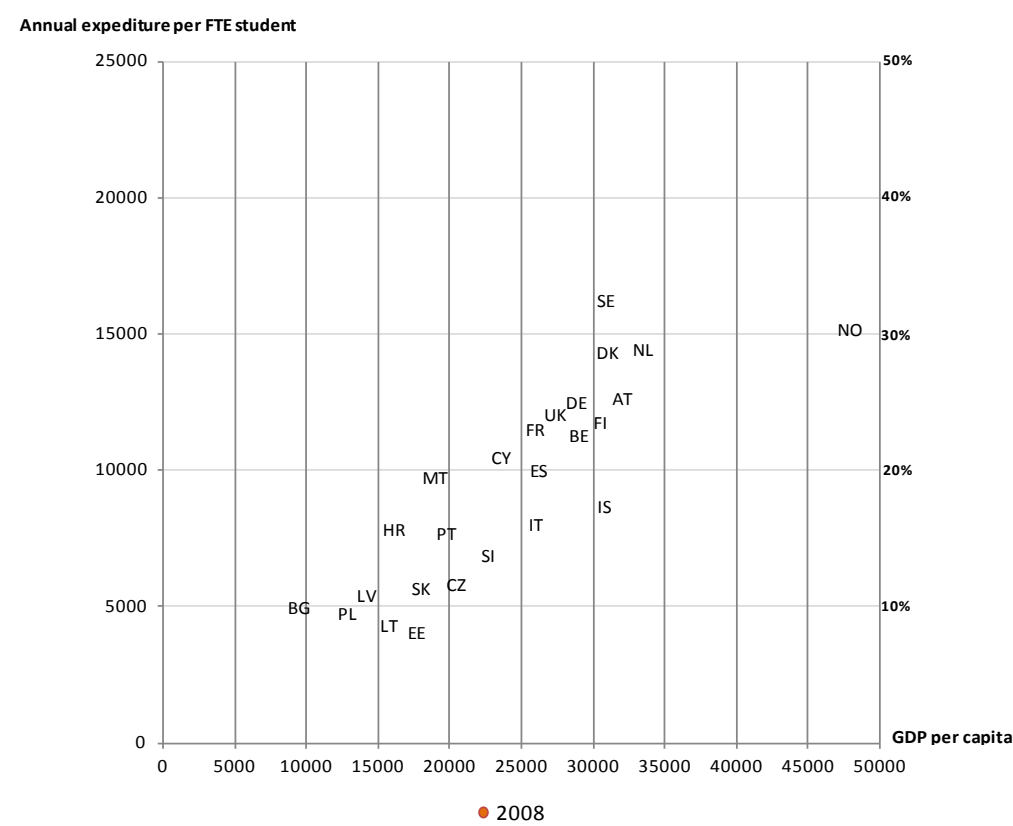
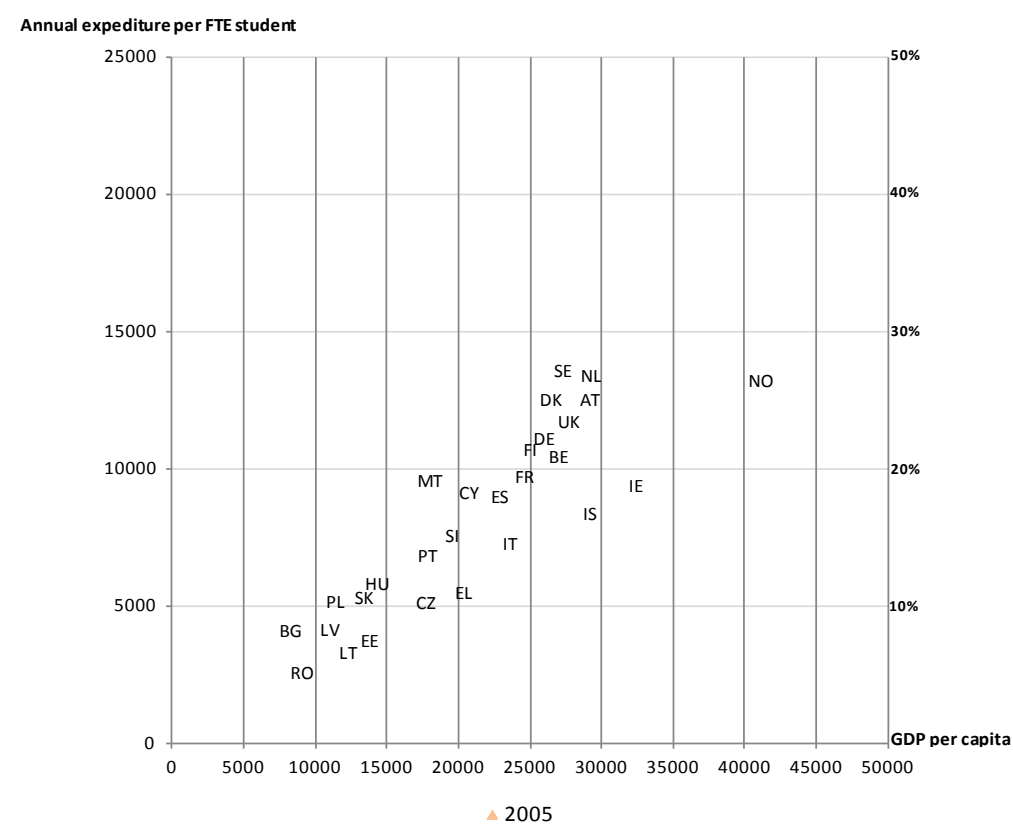
This indicator reveals that countries that have different levels of GDP per capita and annual expenditure per student, make a similar relative financial effort towards tertiary education. For instance, Turkey spends slightly more than 50 % of its GDP per capita on each tertiary student which is nearly 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.

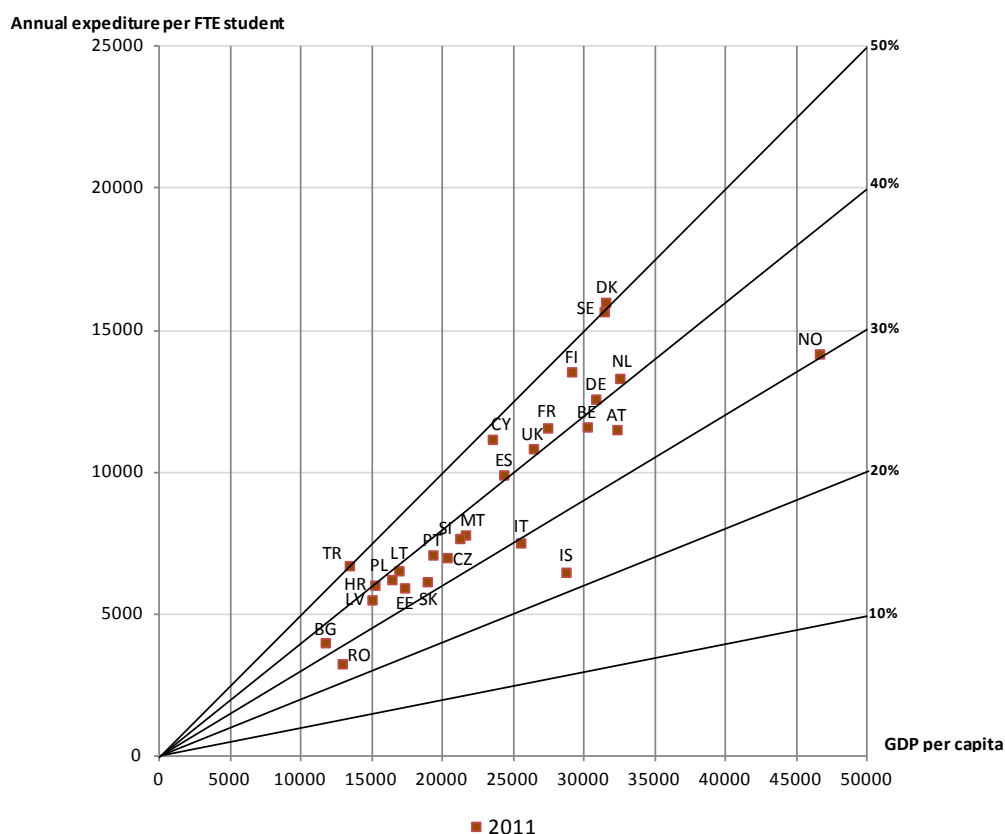
The economic and financial crisis provoked a decrease in the GDP per capita in numerous European countries when comparing 2011 with 2008. In these countries, investment per tertiary student decreased at a slower pace than GDP per capita (Spain); at a faster pace than GDP per capita (the Netherlands, 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	SI
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	35.8
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	28.2
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	36.5
	MT	AT	CZ	BG	EE	SK	NO	IT	RO	IS	EL	HU	IE	LI			
2005	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	47.7	39.4	30.8	44.4	26.1	28.3	30.7	28.6	:	26.7	:	:	:	:			
2011	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).

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*". 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.*"

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.

All of these commitments are entirely coherent consequences of the findings of the 2012 Bologna Implementation Report.

BFUG Working Group on Structural Reforms

The 2012-2015 Working Group on Structural Reforms was mandated in 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 on the section of 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 covers the implementation of the Lisbon Recognition Convention ⁽¹⁾.

2.1. Bologna structures

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 complementing 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 analyses 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. Structure and 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 and how it 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 of the percentage highlights the opposite. However, the indicator should only be considered as a proxy of the implementation of the Bologna structure.

Increases in the percentage of students enrolled in programmes following the Bologna model through time initially suggest that countries have stepped up implementation. Such an assumption may or may not be justified. Two tertiary education systems that register an increase in the percentage of students

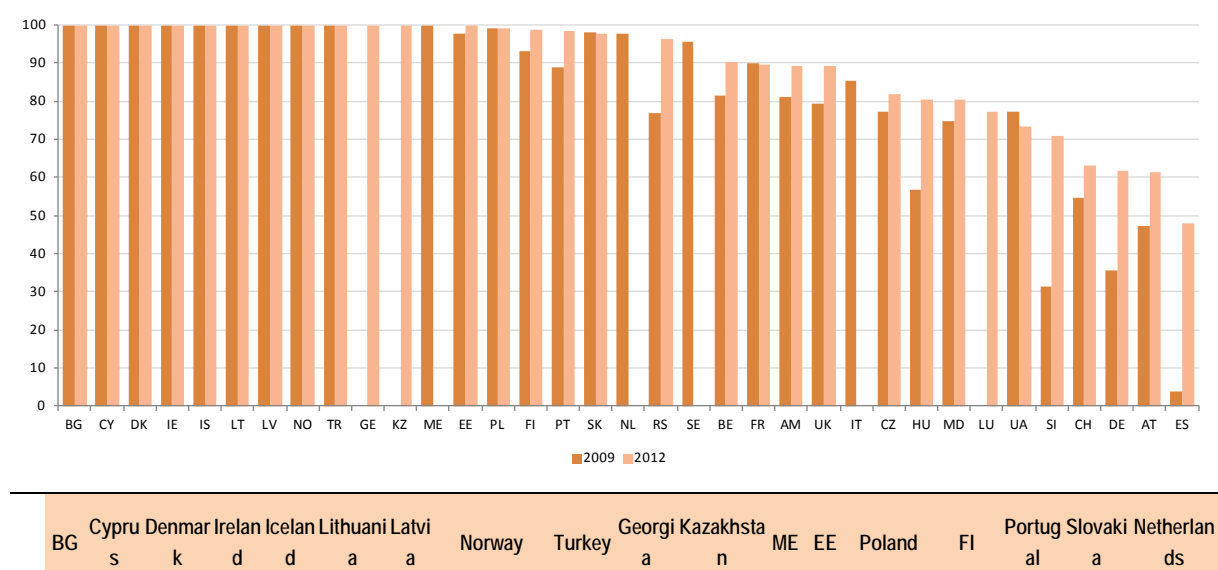
(1) Convention on the Recognition of Qualifications concerning Higher Education in the European Region, Lisbon, 11 April 1997.

enrolled in programmes following the Bologna model may face two different situations regarding the move toward the full implementation of the Bologna structure. The first country has developed the implementation of the Bologna model (i.e. an increasing number of programmes follows the three-cycle structure and thus the percentage of students enrolled concerned also increases). In the second country, however, the relative number of programmes following the three-cycle structure has remained the same (*stricto sensu* the Bologna model did not develop) but the number of students enrolled in programmes following the three-cycle structure increased relatively more than enrolments in programmes outside the Bologna model. Conversely, a decrease in the percentage of students enrolled in programmes structured according to the Bologna model does not necessarily indicate a move backward in the implementation of the Bologna structure.

Overall, 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 for which data is available, the Bologna model is fully implemented (i.e. all students are enrolled according to the Bologna framework). In another third of the EHEA countries, more than 89 % of students are enrolled in the Bologna three-cycle structure. Despite being less developed, the Bologna model is a reality for more than 70 % of enrolled students in the remaining countries except Switzerland, Germany and Austria where 63.2 %, 61.9 % and 61.5 % respectively of enrolled students study in the framework of the Bologna structure. Spain is the only EHEA country for which data is available, where more than half of tertiary students are still outside the Bologna three-cycle structure.

The data demonstrates that some countries which chose an unhurried step-by-step implementation in the first stages of the Bologna process, have sped up implementation in recent years. In Spain, the percentage of students enrolled in the Bologna structure increases by 44 percentage points (pp) from 3.5 % of all students to almost 48 % of them. In Slovenia, this percentage reaches nearly 71 % (an increase of 40 pp compared to 2009). Despite the large differences in their level of implementation, Germany and Hungary also register a significant development of the Bologna model with increases of 26 pp and 24 pp respectively. In other countries, the development is more moderate. In Serbia, the percentage of students enrolled in the Bologna structure reached 96 % in 2012 (a 19 pp increase compared to 2009).

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



2009	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	100.0	97.7	99.0	93.1	88.9	98.1	97.8
2012	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	99.3	98.8	98.6	97.8	:
	RS	Sweden	BE	France	AM	UK	Italy	Czech Republic	Hungary	Moldova	LU	UA	SI	Switzerland	Germany	Austria	Spain	
2009	76.9	95.5	81.6	90.0	81.3	79.3	85.5	77.3	56.7	75.0	:	77.2	31.3	54.6	35.6	47.1	3.8	
2012	96.3	:	90.2	89.7	89.4	89.2	:	81.8	80.6	80.3	77.4	73.3	70.9	63.2	61.9	61.5	47.9	

Notes: [To be included].

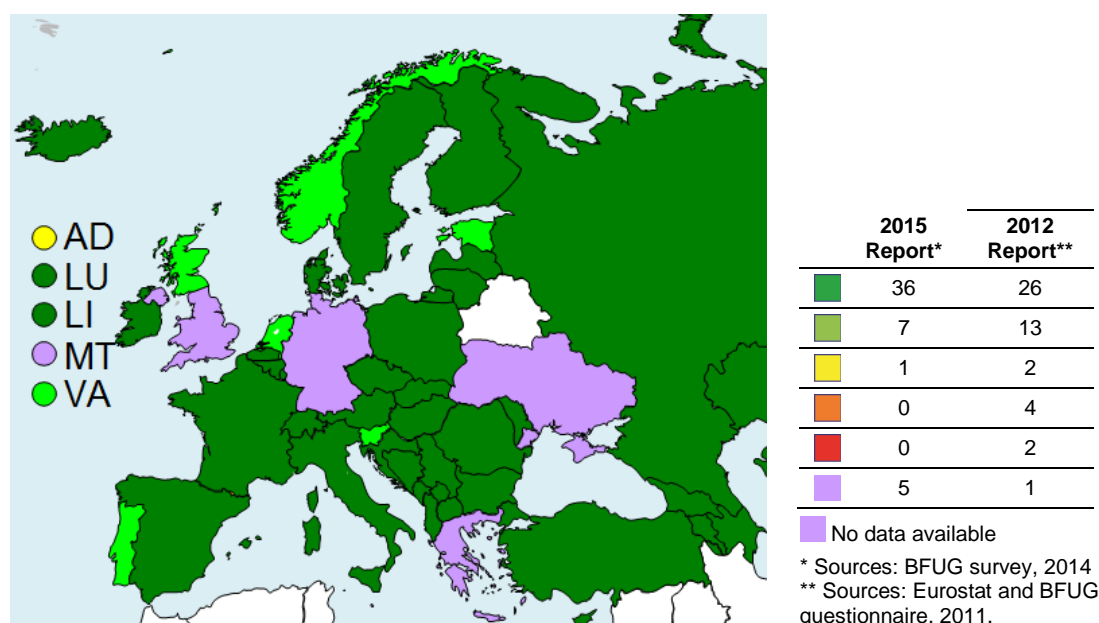
Source: Eurostat, UOE and additional collection for the other EHEA countries.

The 2014 EUROSTAT data shows the comparison of the share of students studying in the Bologna three cycle structure in 2012 against 2009 (Figure 2.2). This comparison 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 between 2009 and 2012 has 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. Thus, in Spain the share of students studying in Bologna model programmes has grown by 44% between 2009 and 2012, in Slovenia by 32%, in Germany by 26%, in Hungary by 24% and in Serbia by 19%. However, little or no progress was made in Austria during this period (an increase of 0.1 %).

It should, however, be recognised that the latest EUROSTAT data goes up to 2012 only. For data on the progress between 2012 2014 interval, information is provided in Figure. 2.3, 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.

Figure 2.3: Scorecard indicator n°1: Stage of implementation of the first and second cycle, Data from BFUG survey, 2013/14²



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 ⁽³⁾ 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

Scorecard indicator No1 shows that the first and second cycles are close to being fully implemented (see also notes above). 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 study in programmes leading to qualifications in regulated professions which are not rearranged into a bachelor-master pattern. Norway explained that while the

² Question to The former Yugoslav Republic of Macedonia: according to Eurostat data, the Bologna system has not been implemented prior to 2012. Has there been a major reform that should be reported in this section?

(³) “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.

programmes in question are not rearranged to bachelor-master pattern, the other aspects of the Bologna process, e.g. ECTS and learning outcomes, have been implemented in these programmes.

Eurostat data (Figure 2.4) shows that in two thirds of the EHEA countries for which data is available; more than half of the tertiary students are enrolled in first cycle (bachelor) programmes. In this group of countries, first cycle student account enrolments range from 50.4 % of the total student population (Luxembourg) to 95.4 % (Kazakhstan). Conversely, bachelor's students represent less than 40 % of the total student population in Spain (38.3 %) and France (32.3 %) while they show different situations regarding the implementation of the Bologna structure (Figure 2.2a).

Short or short-cycle (less than three years) programmes feature differently in the higher education landscape according to the country concerned. While in more than half of the EHEA countries for which data is available, such programmes do not exist, less than 5 % of tertiary students are enrolled in them in Iceland (1.4 %), Georgia (2.5 %), Luxembourg (2.6 %) and still less than 10 % of students in Cyprus (8.4 %). Short programmes are much more common in Turkey (29.2 %), Norway (23.1 %), France (21.6 %) and Ireland (20.6 %).

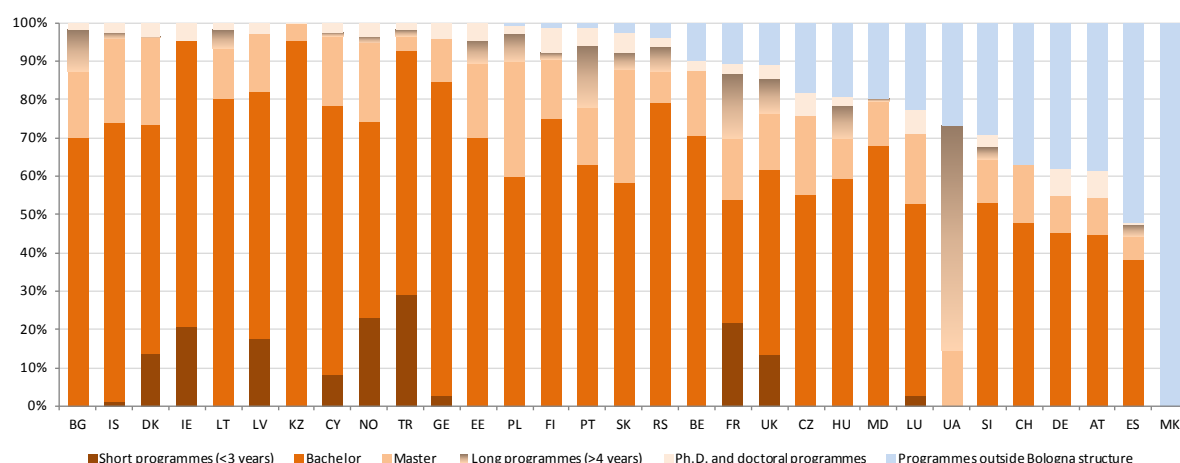
Long (four years or more) programmes are offered in nearly two-thirds of the EHEA countries for which data is available. However, the percentage of tertiary students concerned is very low (less than 2 %) in numerous countries (e.g. Finland, Iceland, Cyprus, Moldova, Turkey and Denmark) and nowhere does it exceed 10 % of the student population except 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 except in Finland, Slovakia, the Czech Republic, Luxembourg, Germany and Austria.

Countries that still need to further develop the implementation of the Bologna structure show different 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). Spain shows a more balanced pattern: while 44.4 % of the “non-Bologna students” are enrolled in a long first degree (ISCED level 5A), one fifth 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 occupationally 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 at the second stage of tertiary education leading to an advanced research qualification (ISCED level 6). To a lesser extent, the situation in Slovenia is similar: the majority of students for which the Bologna structure is not yet implemented (56.6 %) are enrolled for a first qualification at ISCED level 5B level, while the others are enrolled for a first degree lasting from 3 to less than 5 years (ISCED level 5A).

Figure 2.4: Distribution of students enrolled in programmes following the Bologna three-cycles structure, by cycle, 2011/12



	BG	Iceland	Denmark	Ireland	Lithuania	Latvia	Kazakhstan	Cyprus	Norway	Turkey	Georgia	EE	Poland	FI	Portugal	Slovakia
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	France	UK	Czech Republic	Hungary	Moldova	LU	UA	SI	Switzerland	Germany	Austria	Spain	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: [To be included].

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

Figure 2.4 therefore illustrates that 12 out of the 34 higher education systems for which data is available, had all students enrolled in programmes following the three-cycle structure, and in a further eight systems less than 5% students follow programmes outside the Bologna framework. at the other extreme, the Former Yugoslav Republic of Macedonia does not use the Bologna framework in 2012.

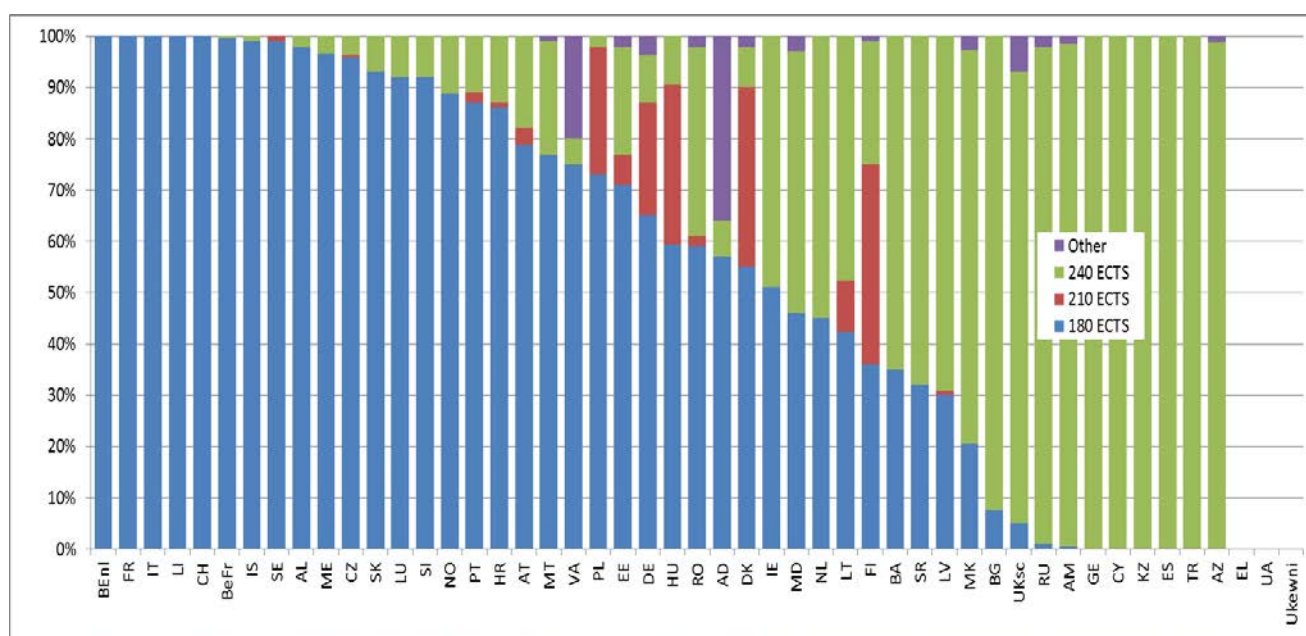
Most common models and typical credit ranges of ECTS in the first cycle

Figure 2.5 shows the share of programmes having the typical workload of 180 ECTS and 240 ECTS, credits, but also those programmes with 210 ECTS and/or another number of credits. The average share of the whole EHEA are: programmes with a workload of 180 ECTS - 58%; 240 ECTS – 37%; 210 ECTS – 4%; and a different workload, just 2%.

Thus, 180 and 240 ECTS models dominate the structure of first cycle programmes, with the 180 ECTS workload model being almost 20 % more widespread than the 240 ECTS model. The 210 ECTS workload is not widespread in the EHEA at large, but it is important in five countries: Denmark (35% programmes), 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.

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. Most countries have a combination of 180 ECTS and 240 ECTS often accompanied with programmes of other durations in the first cycle. However, like in 2012, in Flemish Community of Belgium, France, Italy, Liechtenstein and Switzerland have 180 ECTS Bachelor programmes only. A strong predominance of the 180 ECTS model can therefore be seen in Albania, the French Community of Belgium, Czech Republic, Luxembourg, Montenegro, Norway, Slovakia, Slovenia and Sweden.

Figure 2.5: Share of first cycle-programmes having workload 180 ECTS credits, 210 Credits and 240 ECTS credits or other number of credits*, 2013/14



Source: BFUG questionnaire

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 and Ukraine failed to submit data

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

There is no single model of first-cycle programmes in the EHEA. Most countries have a combination of 180 ECTS and 240 ECTS, often accompanied with programmes of other durations in the first cycle. The 210 ECTS model is not widespread in the EHEA, however, it is important in some countries and mainly in professional bachelor programmes.

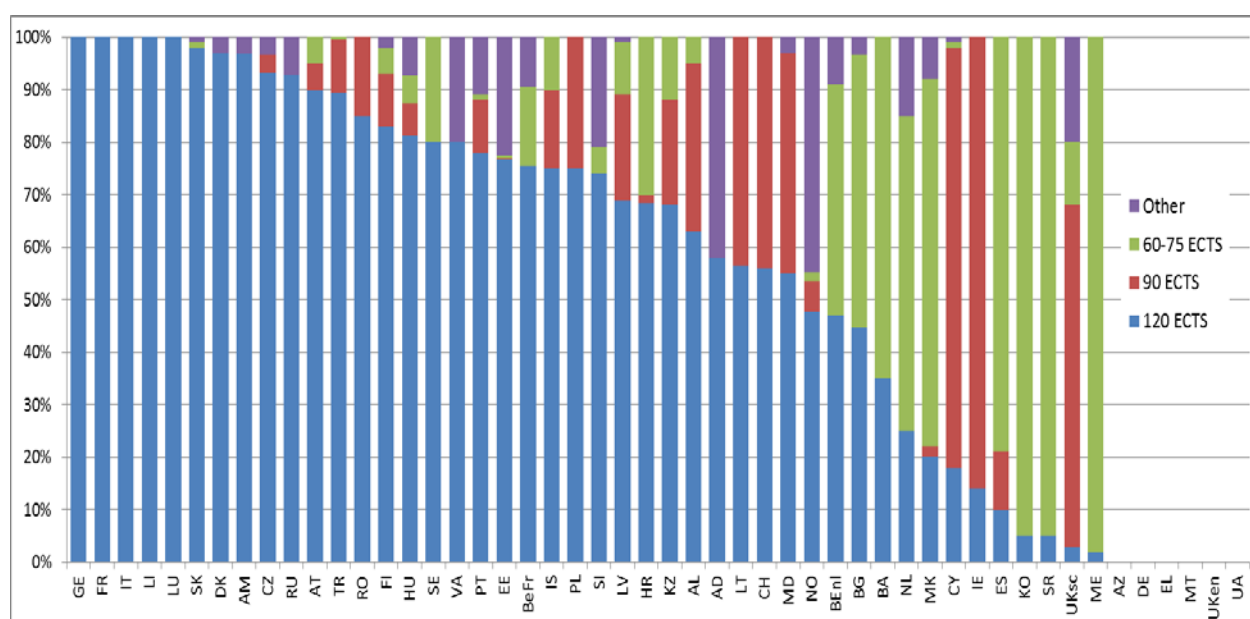
The comparison with the Report of 2012 shows a slight trend towards further diversification and moving away from the workload of 180 ECTS.

Nearly half the countries (23) confirmed that in their higher education systems academic and professional programmes are structured differently, 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 include 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.

A few countries admit differences in the proportion between general, specialised and applied knowledge and skills, especially in the case of programmes leading to qualifications for regulated professions, i.e. if the education is governed by the EU directives 2005/36/EC and 2014/55/EU or by specific national requirements for regulated professions.

Most common models and typical credit ranges of ECTS in the second cycle

Figure 2.6: Share of second-cycle (master) programmes with a workload of 60-75, 90, 120 or another number of ECTS credits, 2013/14*



Source: BFUG questionnaire.

*Azerbaijan, Germany, Greece, Malta and United Kingdom (England, Wales and Northern Ireland) could not provide statistical

In the second cycle (Figure 2.6), 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% second cycle programmes follow the 120 ECTS model, while 60-75 ECTS model is present in 16% programmes, 13% second cycle programmes in the EHEA follow the 90 ECTS model but 6% of programmes have another duration. In the United Kingdom (England, Wales and Northern Ireland) this data is not centrally available, however the most typical workload is 90 ECTS – for Taught Master degrees and 180 ECTS for Taught MPhil.

The 60-75 ECTS model is present in 26 countries and dominates in four systems (a reduction from eight in 2012). The 90 ECTS model is less widespread: while it is present in 22 systems, it dominates in only three countries (six in 2012) – Cyprus, Ireland, and the United Kingdom (Scotland). In 19 higher education systems, there are also programmes with a workload other than 60-75, 90 or 120 ECTS credits. The above tendencies were also confirmed by the data on the shares of students enrolled in second-cycle programmes. 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 60-120 ECTS interval in most cases is between 1% and 5%, however they reach 10% in Russia and 13,5% in Norway.

There is no single model of either first or second-cycle programmes in the EHEA.

In the first cycle, 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.

Common duration of Bachelor's and Master's programmes

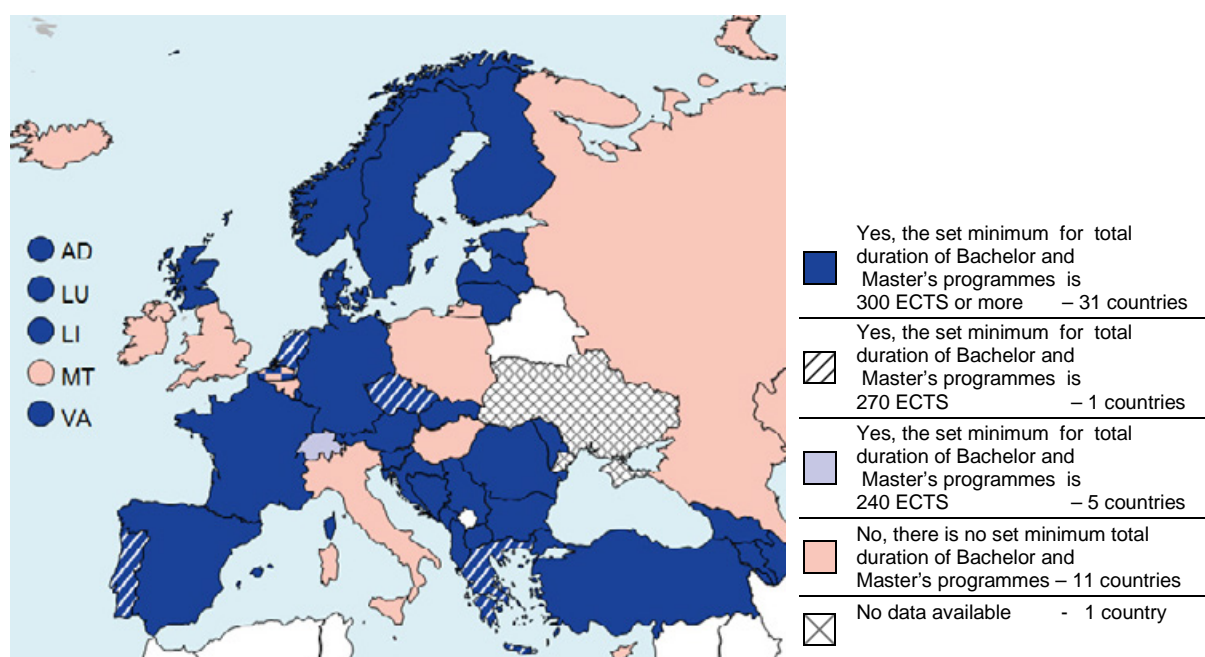
If looking at first and second cycle studies together in the EHEA, the student's total workload may vary considerably. While the most widespread combination is the 180 ECTS (first cycle) plus 120 ECTS (second cycle), at least twelve combinations are commonly found between 240 ECTS ("3+1") to 360 ECTS ("4+2"). These combinations are outlined in table 1.

Table 1. 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

The difference between the extremes is 120 ECTS or two nominal years of study, and this reality has caused recognition problems. For this reason, the 2014 BFUG questionnaire asked countries if they have set a minimum total workload of first and second cycle studies.

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



* Source: BFUG questionnaire, 2014

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).

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 of the bachelor and master combinations (mainly “3+2”; “4+1”). Georgia and Azerbaijan have set even higher minimum total

workload (360 ECTS and 330 ECTS correspondingly). Switzerland has set the minimum of 270 ECTS. Finally, Five countries – French speaking community of Belgium, Czech Republic, Greece, the Netherlands and Portugal require at least 240 ECTS credits (“3+1”), although in French speaking community of Belgium the most typical combined minimum is 300 ECTS credits. Lithuania and Moldova in turn, also regulate the maximum workload of the first and second combined – 360 ECTS credits and 330 ECTS credits respectively.

The main characteristic of a qualification is learning outcomes and workload considerations are therefore secondary. However, the recognition of foreign qualifications whose study workload is substantially smaller than that of in the country where recognition is sought can lead credential evaluators to question whether the learning outcomes of such a qualification can be similar to the one of the host country (Recommendation on Criteria and Procedures for the Assessment of Foreign Qualifications of the qualification in another country)⁴. For the above reason, the large differences (60-120 ECTS credits) in the total workload of first and second cycles, may cause problems in recognition of second cycle qualifications.

The differences in the total workload of the first and second cycles in EHEA 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.

Programmes outside the typical Bologna models

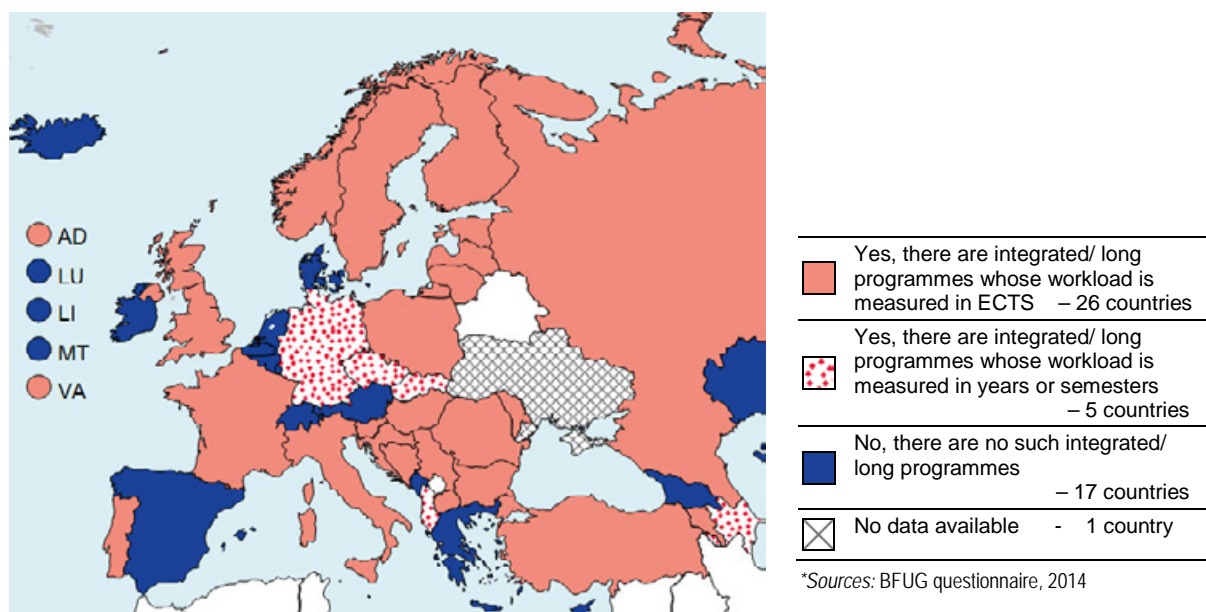
31 higher education systems confirm the existence of degree programmes outside the two-cycle (Bachelor-Master) model.

Integrated first and second cycle programmes. The most typical ‘deviation’ from the Bologna two cycle model are the integrated programmes including both the first and second cycle of studies 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 integrated/long programmes is 31 and this figure has not changed since 2012.

In the earlier years a substantial number of countries continued to measure the workload in those 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.

⁴Revised 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,
http://www.coe.int/t/dg4/highereducation/recognition/criteria%20and%20procedures_EN.asp#P309_37160

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



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 the EU/EEA countries. In general, this duration is 300-360 ECTS (five-six years) depending on the regulated profession in question. Additional data show that the share of the above 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, mainly in Science, Technology, Engineering and Maths (STEM) subjects and professions allied to medicine. This leaves a remaining 10% to arts, humanities and social science.

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

Deviations to the typical Bologna duration in the second cycle (outside 60-120 ECTS credits) are observed in 27 Higher education systems, mainly in those cases where programmes leading to regulated professions have been rearranged into two Bologna cycles, but the regulations of the profession in question require a total duration of studies longer than 300 ECTS/5 years. For this reason in the second cycle programmes can comprise up to 180 ECTS Belgium, Cyprus, Finland, Holy See, Montenegro, Norway, Switzerland and even more in United Kingdom (Scotland) - 187,5 ECTS credits), and up to 150 ECTS credits in Czech Republic, Finland and Hungary - mainly in medicine, dentistry, pharmacy, veterinary medicine, architecture, law or theology.

In the United Kingdom, there are more second cycle qualifications outside the Bologna model, such as Taught MPhil (<180 ECTS), Postgraduate diplomas (60 ECTS), Postgraduate certificates (30 ECTS). Some other countries have introduced a greater duration of the second cycle (180 ECTS) with a view to accommodate students having a bachelor degree in a different field (Slovakia) or to facilitate programmes with specific language requirements (Holy See).

‘Pre-Bologna’ programmes. Another group of programmes including both first and second cycles are the ‘pre-Bologna’ programmes in those countries whose legislation allowed for long transition periods, for instance in Andorra, Slovenia and Spain. Those programmes will cease to exist when the first cohort of the students studying in the Bologna model graduate.

Access to the next cycle

Access between the Bologna cycles has been among the most important issues already since the beginning of the Bologna process. It has been stated in the Bologna Process that first-cycle degrees should give access to studies in the second cycle, while the second-cycle degrees should give access to doctoral studies" ⁽⁵⁾. 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, and 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.

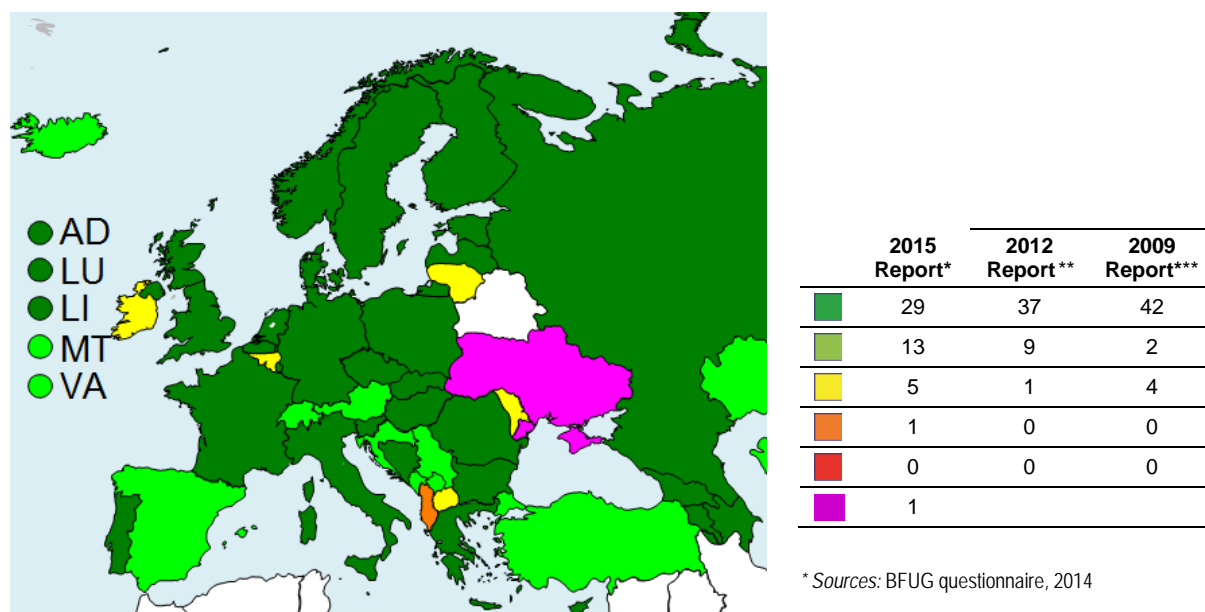
Similar reasons may hinder access of holders of the "professional" second cycle qualifications to enter doctoral studies. Consequently, ministers in several of Bologna ministerial communiqués encouraged efforts to remove barriers to access and progression between cycles ⁽⁶⁾⁽⁷⁾.

Are of such programmes ⁽⁵⁾ Realising the European Higher Education Area. Communiqué of the Conference of Ministers responsible for Higher Education, Berlin, 19 September 2003.

⁽⁶⁾ The European Higher Education Area – Achieving the Goals. Communiqué of the Conference of European Ministers Responsible for Higher Education, Bergen, 19-20 May 2005.

⁽⁷⁾ London Communiqué: Towards the European Higher Education Area: responding to challenges in a globalised world, 18 May 2007.

Figure 2.9: Scorecard indicator n°2: Access⁸ to the next cycle, 2013/14 *



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 ⁽⁹⁾
- 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

In 28 countries, all first-cycle programmes now give access to the second cycle. In the next group 14 countries can be found in the category "light green". In Bosnia-Herzegovina some first-cycle qualifications do not give access to the second cycle, while some of second-cycle qualifications do not give access to the third cycle in Armenia, Austria, Croatia, Iceland, Kazakhstan, Malta, Montenegro, Serbia, Switzerland and Turkey. In 3 countries - Denmark, Holy See and Spain some programmes in both the first and second cycles do not give direct access to the next level.

⁽⁸⁾ 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.

⁽⁹⁾ Compensatory measures required for students coming from another study field will not be counted as "major transitional problems".

In 5 countries – Albania, Belgium (French speaking community), The former Yugoslav Republic of Macedonia, Ireland, Lithuania and Moldova **more** than 25% have some second-cycle qualifications that do not give access to the third cycle, but in Albania less than 50% second cycle qualifications do not give access to the third 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 (Dutch speaking community), Lithuania and the Netherlands graduates from professional programmes must complete bridging programmes. Malta applies a 30 ECTS bridging course if the field of study is different, but in Switzerland additional courses 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 *Regulation of progression between first and second cycle* below, particularly Figure 2.9).

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.

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 2.10.

Access to second cycle applicants may have additional requirements, of which the main are the following: applicants have to sit additional examinations, to take additional courses or a prior job experience is requested. However, there are several main cases of application of the additional requirements, namely: additional measures as a rule applied to all students; requirements at the cases where the applicants holding a professional first cycle qualification but seek admission to an academic second cycle programme; applicants holding a first cycle qualification in a different study field; applicants holding a first cycle qualification in the same study field

General additional requirement applied to all students. Just some countries use the above additional requirements for all students. In eight countries - Azerbaijan, Bosnia-Herzegovina, Czech Republic, Georgia, Kazakhstan, Moldova, Russia, Turkey, all students have to sit entrance exams, and some students will have to sit examinations in another 22 countries. However, several countries admitted that they chose the answer “Some students” due to additional requirements in the cases of highly specific fields e.g. creative arts, sports or other and therefore the requirements affect a small share of all students. The same is true in the cases of applying additional courses. Regarding the prior

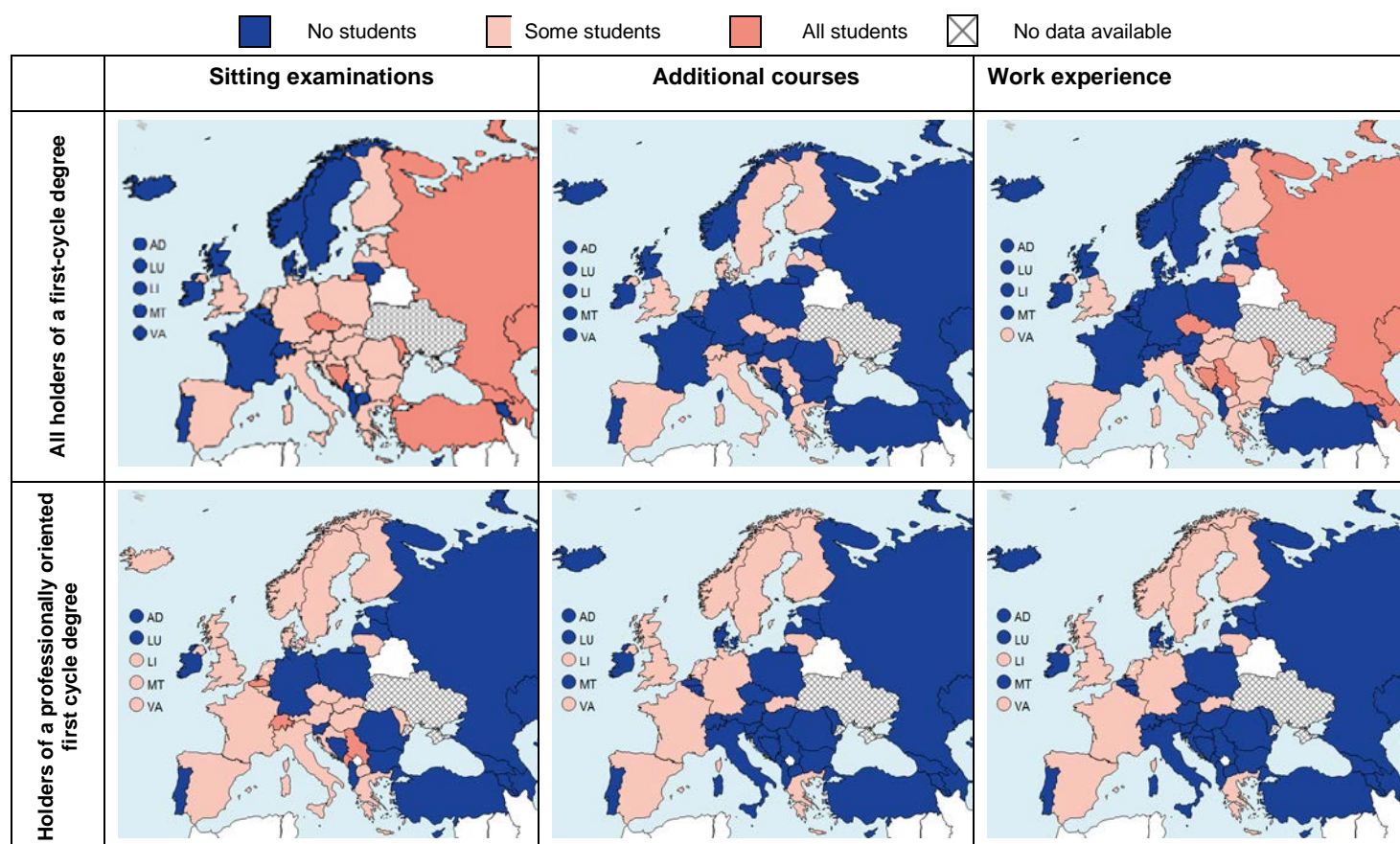
work experience as a rule, it is mentioned by 19 countries. In Finland, if a professional first cycle degree holder applies to further professional studies, work experience between the two cycles is compulsory.

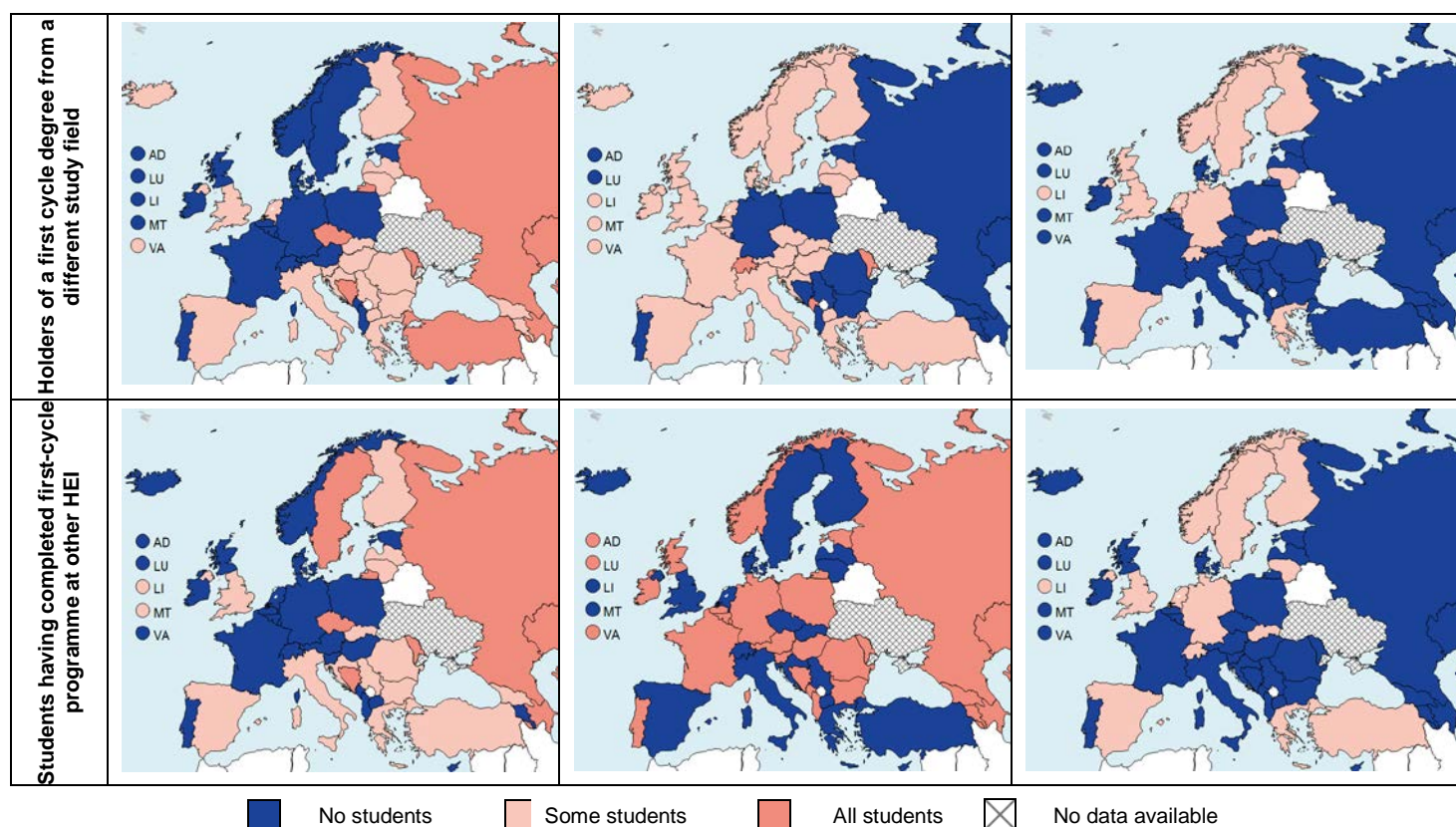
Applicants holding a professional first cycle qualification. All applicants holding professional first cycle qualifications have to sit examination in the countries mentioned above and in 25 countries the examinations are applied in some cases. As regards additional courses, four higher education systems – Flemish speaking community of Belgium, ME, RS and Switzerland countries will apply additional courses but 21 countries will apply this requirement in some cases. Some of these latter countries mention that the additional courses are applied individually.

Applicants holding first cycle qualification in a different field. Additional examinations are only applied in the above group of eight countries where the examinations are a general requirement, but 21 countries apply additional examinations in some cases.

However, 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.

Figure 2.10: Requirement to sit exams or take additional courses for holders of a first-cycle degree to be admitted to a second-cycle programme, 2013/2014





Applicants with qualification in the same field but coming from a different institution.

In the same above group of countries and Sweden applicants with a qualification in the same field but coming from a different HEI will have to sit examinations but in 26 other countries exams will be applied in some cases. No country applies additional courses to all such applicants, but in 29 countries additional courses can be applied to some students.

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. These are mainly cases where a student applies 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, those who hold first cycle qualification in a different study field, but in some countries also applicants who have a degree in the same field but come from a different higher education institution.

Share of first-cycle graduates who actually continue their studies in the second cycle

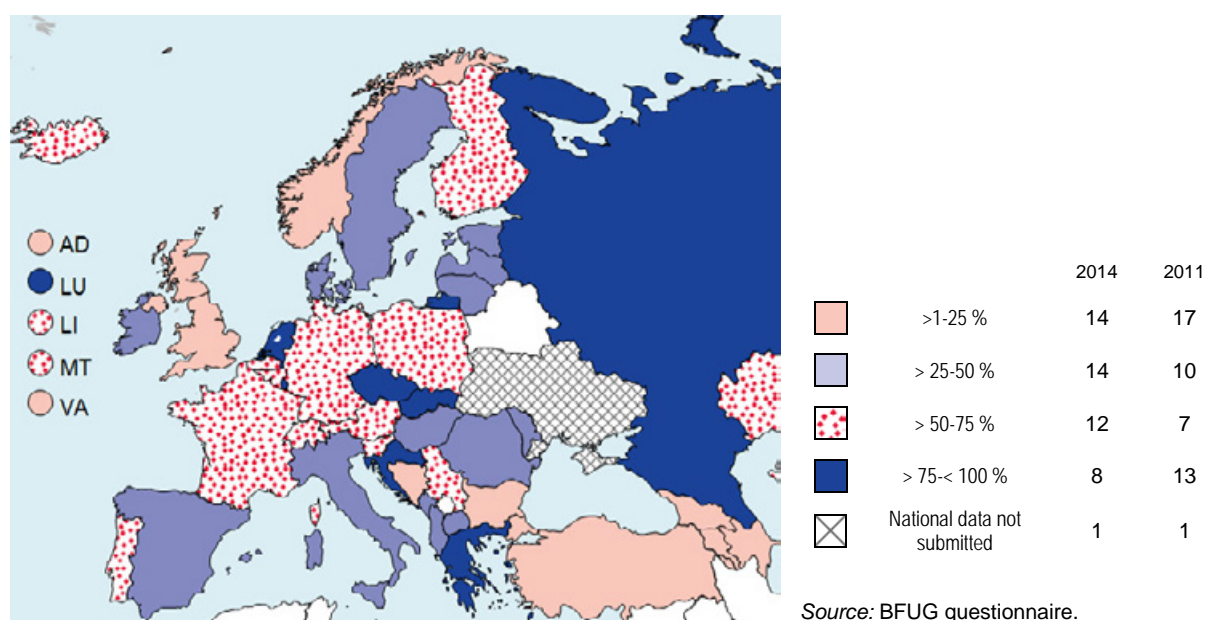
In principle, nearly all first cycle graduates are eligible at least to have access to a second cycle programme in the same field. However, it does not mean that nearly all first cycle graduates should undertake further studies in a second cycle programme – nor that they should remain in the same

field. Figure 2.11 below shows the share of first-cycle graduates who actually continue studies in a second-cycle programme.

In 2014, the number of countries where 76-100% students follow to the second cycle has shrunk even stronger: from 13 in 2011 to 6 in 2014. In addition, in some of those six countries the share of students continuing to the second cycle remained in the 76-100% interval but decreased within this interval.

On the other end of the spectrum, only in 14 countries does the share of graduates who continue to a second cycle stay at 1-25% compared to 17 countries in 2011. According to Figure 2.3 most of the above 14 countries have bachelor programmes with 240 ECTS workload. According to explanations of the above countries, the 240 ECTS programmes include work placements and/or professional training more often than in the programmes of smaller workload. Thus, one explanation of the small share of students continuing to the second cycle is that those graduates are more employable and therefore move to the labour market rather than continue studies. On the other hand, there are other possible explanations - for instance, high selectivity at admission to the second cycle.

Figure 2.11: Share of first-cycle students continuing studies in a second-cycle programme after graduation from the first cycle (within one year), 2013/14



Generally, very high shares of students who continue to second cycle could be an indication that bachelor graduates cannot find jobs and therefore massively enter the second cycle, as it was admitted in several countries in the 2012 report. In some countries the high share of students that choose to continue in the second cycle is a sign of the culture, traditions and opinion in society not accepting a bachelor degree as a qualification for the labour market. Finland and the Netherlands admit that the share of bachelor graduates may differ between university graduates and the ones of the professional HEIs – while the former opt for further studies, the latter rather start their working life.

Changes since 2012 show that the number of countries where nearly all first cycle graduates follow studies in the second cycle has decreased by half. This is a positive move since a very high share of students following to further studies is usually an indication that bachelor graduates have difficulties getting jobs and thus they are forced to study in the next cycle.

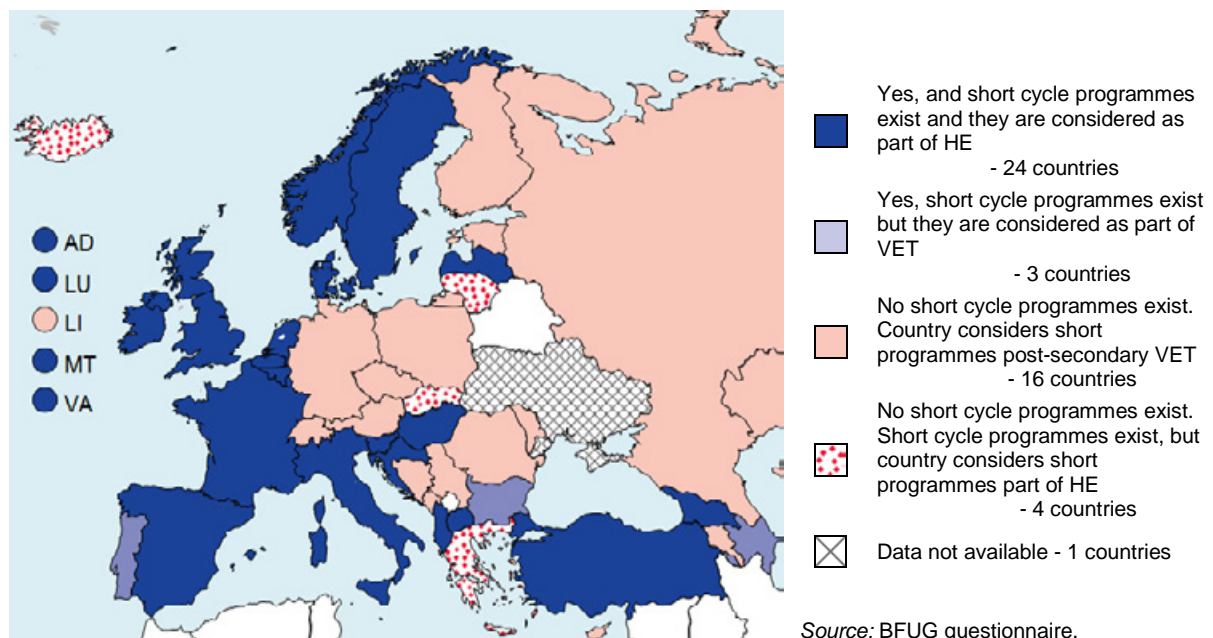
The share of first-cycle students continuing studies in a second-cycle programme after graduation from the first cycle varies among the countries. While in some countries only 1-25% of first cycle graduates go on to studies in the second cycle, in other countries as many as 75-100% graduates do so.

2.1.2. 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 did not have short cycle programmes and they did not plan to introduce them, other countries had short cycle programmes and they were looking how to accommodate those programmes in the Bologna three cycle system. The compromise accepted in the Bologna Process Ministerial Conference in 2005 in Bergen formulated “short cycle within the first cycle” but this has not solved all the issues. Hence several ministerial communiqués have since addressed short cycle studies with a view to improve transparency and comparability of this sector of higher education.

The 2014 BFUG survey attempted to clarify several issues related to short cycle studies. Not all countries have short cycle programmes, however the number of educational systems having short cycle programmes has grown from 14 in 2005 to 27 in 2014, namely Albania, Andorra, Azerbaijan, Belgium, Hungary, Denmark, France, The former Yugoslav Republic of Macedonia, Georgia, Holy See, Hungary, Ireland, Italy, Latvia, Luxembourg, Malta, The Netherlands, Norway, Portugal, Slovenia, Spain, Sweden, Turkey and United Kingdom. As illustrated in Figure 2.12, short cycle programmes are most commonly considered to belong to higher education but in some countries they are attributed to post-secondary VET programmes.

Figure 2.12. Do short cycle programmes belong to higher education? 2014

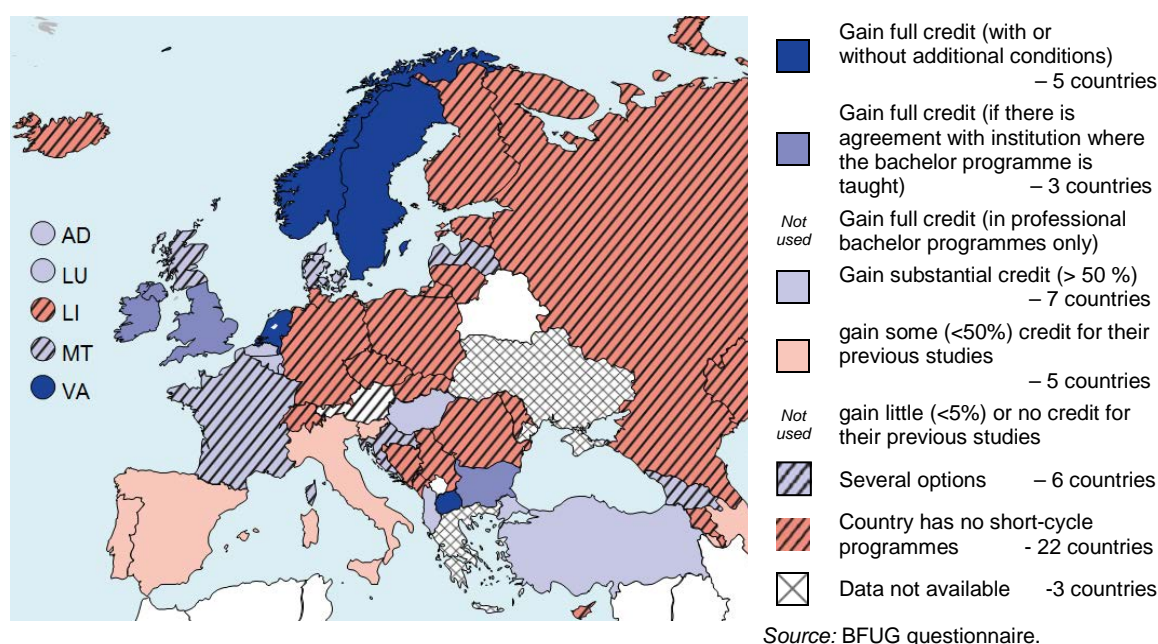


Altogether there are four groups of countries: countries that have short cycle programmes and they are considered part of HE, those that have short cycle programmes but they consider these programmes as part of post-secondary VET. The countries that do not have short cycle programmes

also divide into those considering short cycle programmes as belonging to VET and those who consider them part of HE (see Figure 2.12).

The diversity of the short cycle can also be seen from the names of short-cycle qualifications: *Higher Education Certificate, Undergraduate certificate, Higher Technician, Professional diploma, Advanced Professional Diploma, Interim Qualification, Technological Diploma, Higher Education Diploma, Diploma of Higher Education, Undergraduate diploma, University diploma, Associate degree, Degree, Foundation Degree, First Level Professional Higher Education Diploma, Sub-Bachelor¹⁰, Professional Bachelor*. In addition, some countries such as France, Luxembourg, Malta, Spain and the United Kingdom have several short-cycle qualifications and part of them are at different levels. Also, while the majority of those qualifications belong to professional higher qualifications, some of them are academic.

Figure 2.13: Gaining credits towards bachelor programme in the same field for previous short-cycle studies, 2014



When continuing studies in a first-cycle programme, short-cycle graduates can often gain full credit for their further studies in Former Yugoslav Republic of Macedonia, the Netherlands, Norway, Russia, Serbia and Sweden (see Figure 2.13). In Cyprus, Ireland and United Kingdom (England, Wales and Northern Ireland) short-cycle graduates can gain full credit for studies, but on the condition that there is an agreement between the institution where the short-cycle programme was taught and the institution where the bachelor programme is taught. In Bulgaria, full credit is granted but only when continuing in professional first-cycle programmes. Some countries also mention shorter programmes which either prepare for certain professions or are intermediate qualifications in programmes leading to a first-cycle degree. The length of such programmes can vary between 60 ECTS (one year) to 180 ECTS (three years). The most common length of short-cycle programmes seems to be 120 ECTS credits (two years), as mentioned by Andorra, the French Community of Belgium, Croatia, Denmark, Norway and Sweden.

¹⁰ In UK *Diploma of Higher Education* is of higher level than *Higher Education Diploma*

In seven countries there are several options and in three of the countries the number of credits gained may vary between full credits to zero credit. For instance, in Georgia, there have been no any cases of recognition of short cycle qualification for the purposes to continue studies on bachelor's programmes.

The situation of 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 secondary education. When continuing in first-cycle programmes, short-cycle graduates gain different numbers of credits – from full credit down to some credits and then down to zero credits.

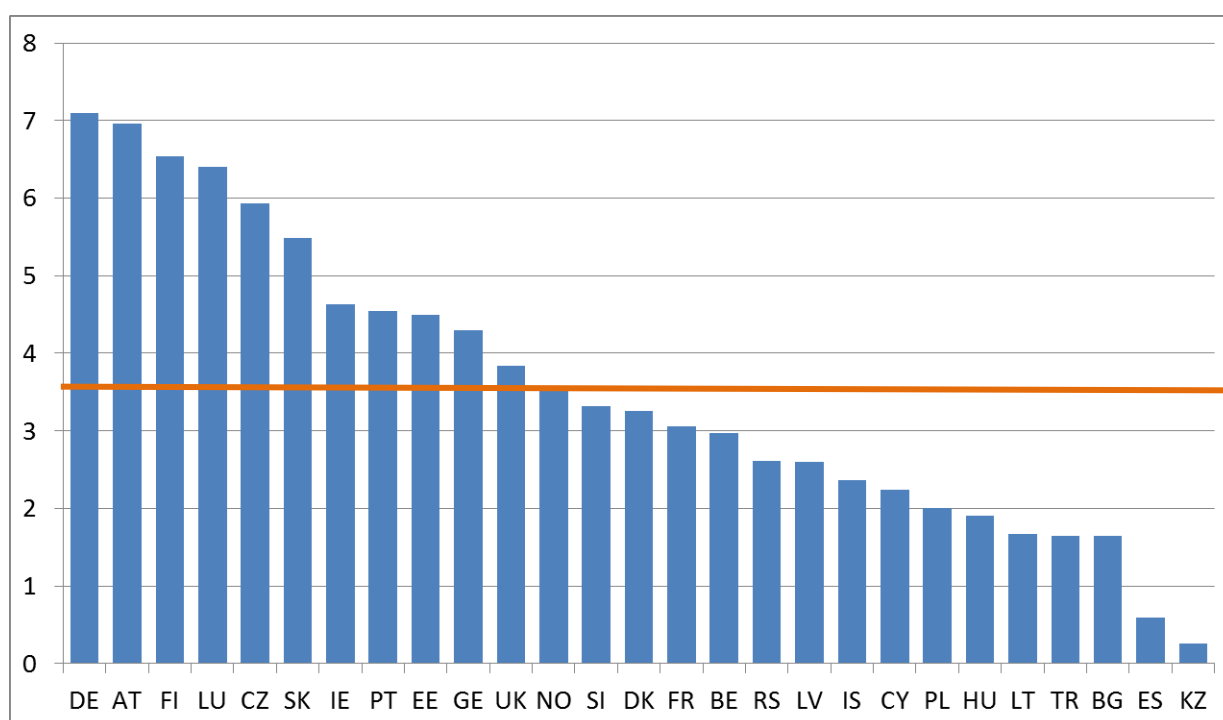
The names of short-cycle qualifications are diverse and the differences are not only linguistic, but rather demonstrate the different situations of the short-cycle education in the national education system.

Short-cycle programmes and qualifications should be addressed in the next period with a view to improve their readability and international comparability.

2.1.3. 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: Share of doctoral students in the total number of students in Bologna pattern. Eurostat 2012

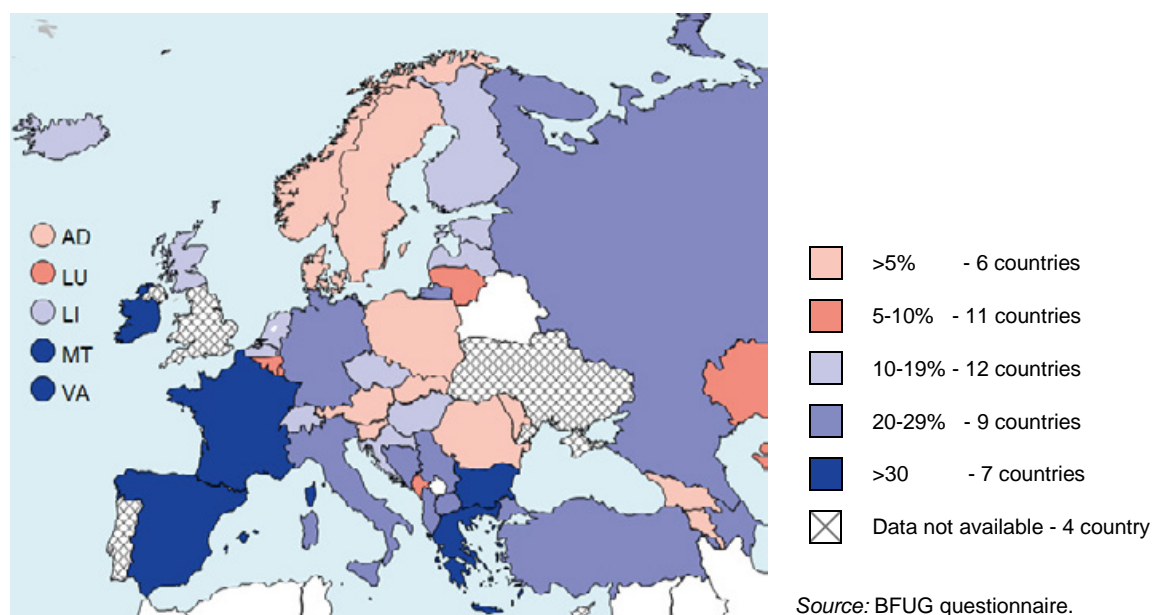


Note: The data does not include doctoral students outside the Bologna pattern

The highest percentages of third cycle students are in Germany and Austria – 7% followed by Finland and Luxembourg with just over 6 %, but the smallest share of doctoral students in the entire student population is in Kazakhstan - 0,25%, and in Spain - 0,60%. It should however take into account that in the case of Spain the reason for a small percentage of doctoral students may be that doctoral students are not studying in Bologna type doctoral 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 eventually entering into a third cycle programme, see results in Figure 2.14.

Figure 2.15: percentage of second cycle graduates eventually enter into a third cycle programme, 2013/14



*Note: in the case of Estonia, the percentage is given within **two** (rather than one) years.*

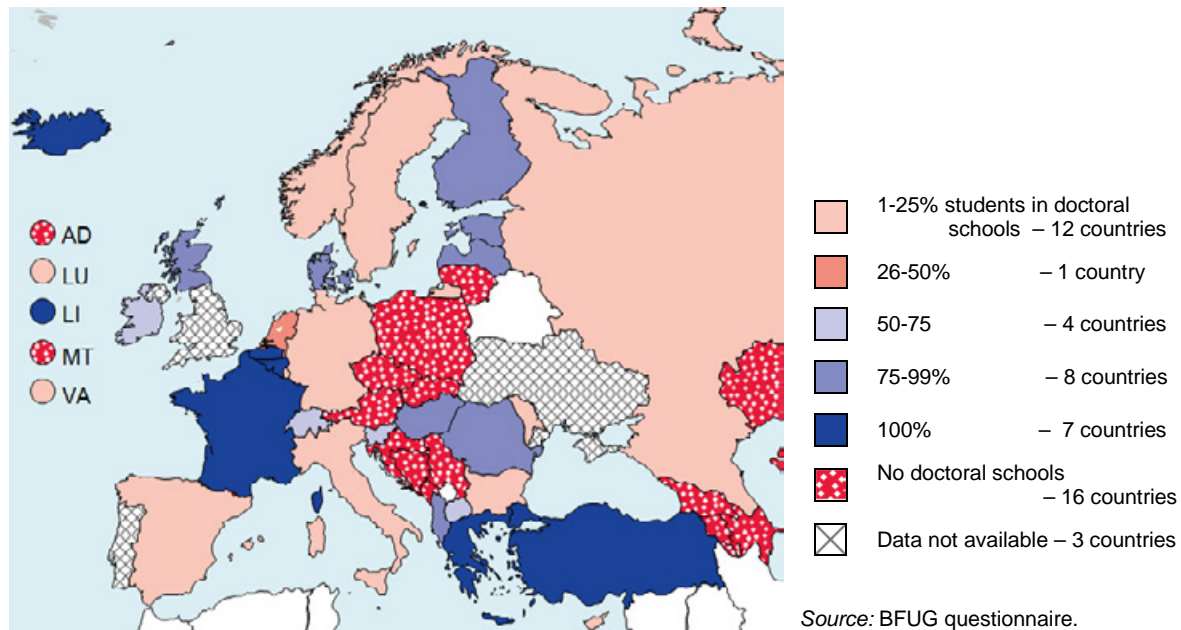
The greatest movement of second cycle graduates to third cycle studies is to be found in Bulgaria, Greece, Holy See, France, Ireland, Malta, and possibly UK (England, Wales and Northern Ireland) although no estimate has been provided. Particularly in England nearly half of doctoral students had their 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 third cycle without second cycle qualification is exceptional and only the high performing students are accepted. In the Flemish community of Belgium this opportunity is mainly given to foreign students. In Holy See, Montenegro, Romania, Spain in turn this path is available to students who have studied in the 300 ECTS programmes and therefore are only formally belong to first cycle graduates.

In most of cases the share of third cycle students entering to doctoral studies without a second cycle qualification is 1-5% in Belgium, Germany, Montenegro, Spain, Sweden, Turkey and United Kingdom (Scotland). In Cyprus, Denmark and 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, Northern Ireland) can not specify the share of students.

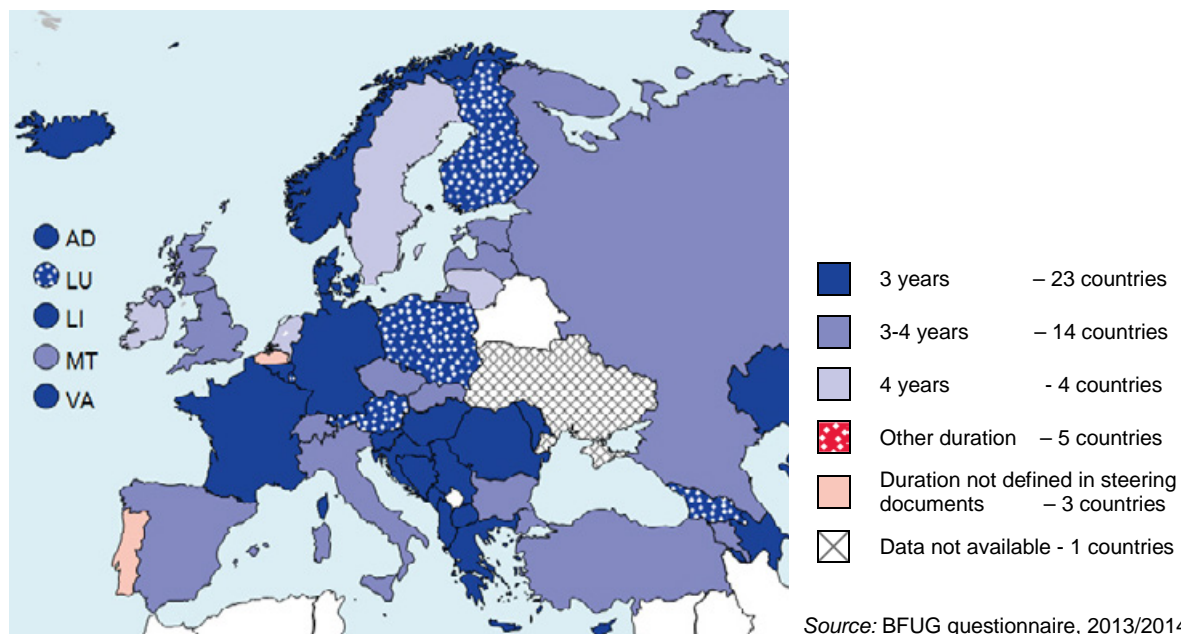
In 2014, the 27 countries have doctoral schools compared with 30 in 2012. There still are 16 countries which do not have doctoral schools (see figure 2.15). Of those 32 countries where are doctoral schools, the most widespread share of students in doctoral schools in 12 countries is between 1-25% of doctoral students, but at the same time there are 8 countries where the most of the students are study in doctoral schools: 75-99% students in doctoral schools in 8 countries and all students in other 7 countries.

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



There are several routes through which to pursue a doctorate in England. These are primarily through traditional supervision based doctorates and specialist training in doctoral training centres. Doctoral Training Centres 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.

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

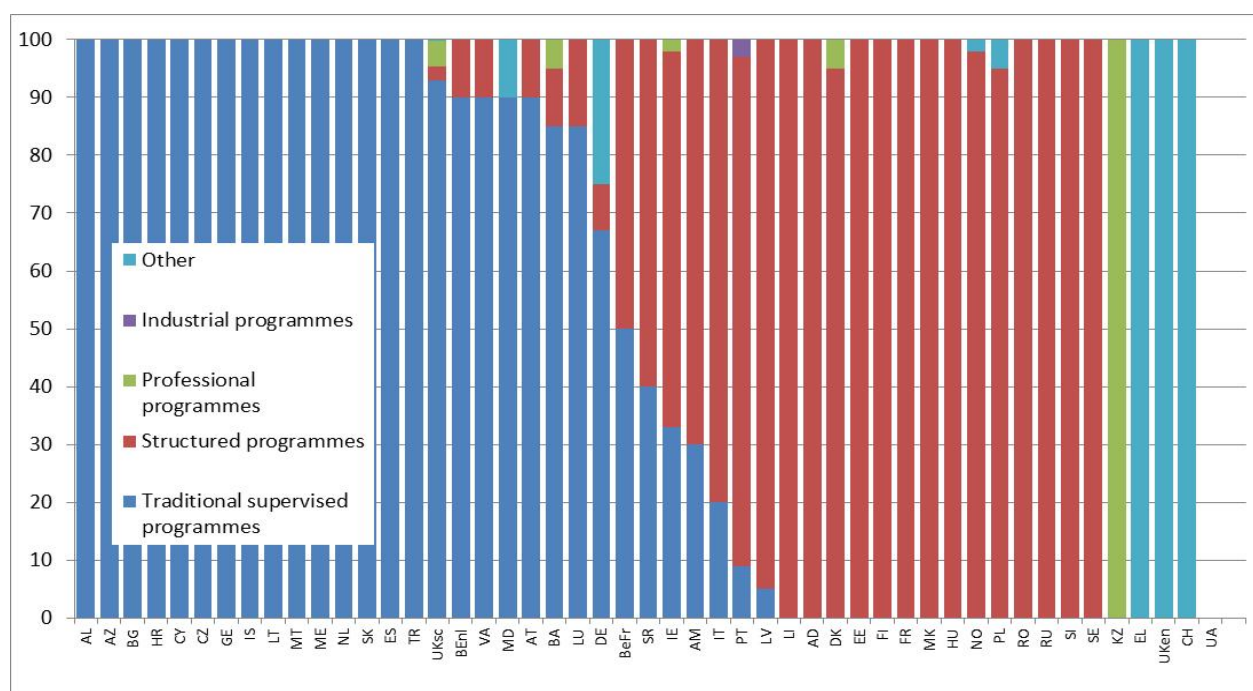


The highest number of countries have a 3 year duration of doctoral studies – 23 countries in 2014 (24 countries in 2012). The second popular duration of doctoral studies is 3-4 years – in 14 countries in 2014. In 4 countries – Ireland, Lithuania, Netherlands and Sweden the duration of the doctoral studies is 4 years. In five countries duration of doctoral studies reaches outside 3-4 year interval: in Finland –

4-5 years, Georgia and Luxembourg – 3-5 years and 2-4 years in Poland. Cyprus, Greece and Portugal do not mention doctoral training in their steering documents.

As shown in Figure 2.17, the most typical prescribed duration of full-time doctoral programmes is three years while in eight countries it is three-four years. Four countries make no attempt to define or regulate the length of doctoral studies. Actual duration is estimated to be between three and four years in most countries.

Figure 2.18: Proportion between traditional and structured doctoral studies and other types of doctoral programmes 2014

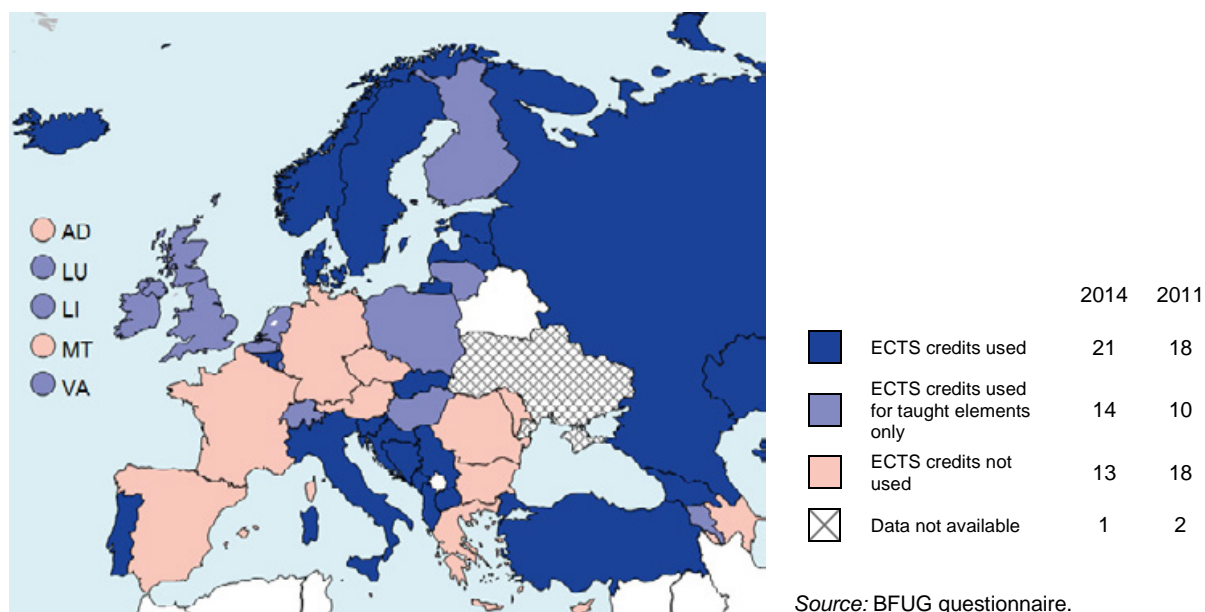


Although the structured doctoral programmes are growing, the traditional supervised doctoral studies are still the most widespread: in 16 countries all doctoral training follow traditional model and in another 9 countries over 70% of programmes follow the traditional approach (Figure 2.18). As regards the structured doctoral studies are more widespread than before and in 2014: in 14 countries all doctoral programmes follow the structured model and in another 6 countries more than 70% of programmes are structured.

Professional doctoral programmes are not yet widespread. Only Flemish speaking community of Belgium, Denmark, Ireland and United Kingdom have 2-5% professional doctoral programmes, Portugal (3%). According to the ad-hoc working group on third cycle, duration of such programmes is usually prescribed at three years, though not all countries regulate this. In Kazakhstan all the doctoral programmes partly resembles professional doctoral programmes.

All those countries which have developed a qualifications framework, include doctoral qualifications into their qualifications frameworks. The use of ECTS in doctoral studies is growing over time. In 2014, 21 systems use ECTS for the whole doctoral studies and 14 countries for the taught elements (see Figure 2.18) and 13 countries do not use ECTS in third cycle programmes. In comparison, in 2011 to 18 systems used ECTS fully, 10 for taught part only and 18 systems did not use in doctoral programmes at all. 18 other countries do not require ECTS to be used in doctoral education.

Figure 2.19: Use of ECTS credits in doctoral programmes, 2013/14



Like in 2011, all the countries which have qualifications frameworks also have included third cycle qualifications. In 8 countries – Albania, Armenia, France, Italy, Moldova, Norway, Slovenia and United Kingdom (Scotland) besides doctoral degrees have other qualifications in the qualifications frameworks.

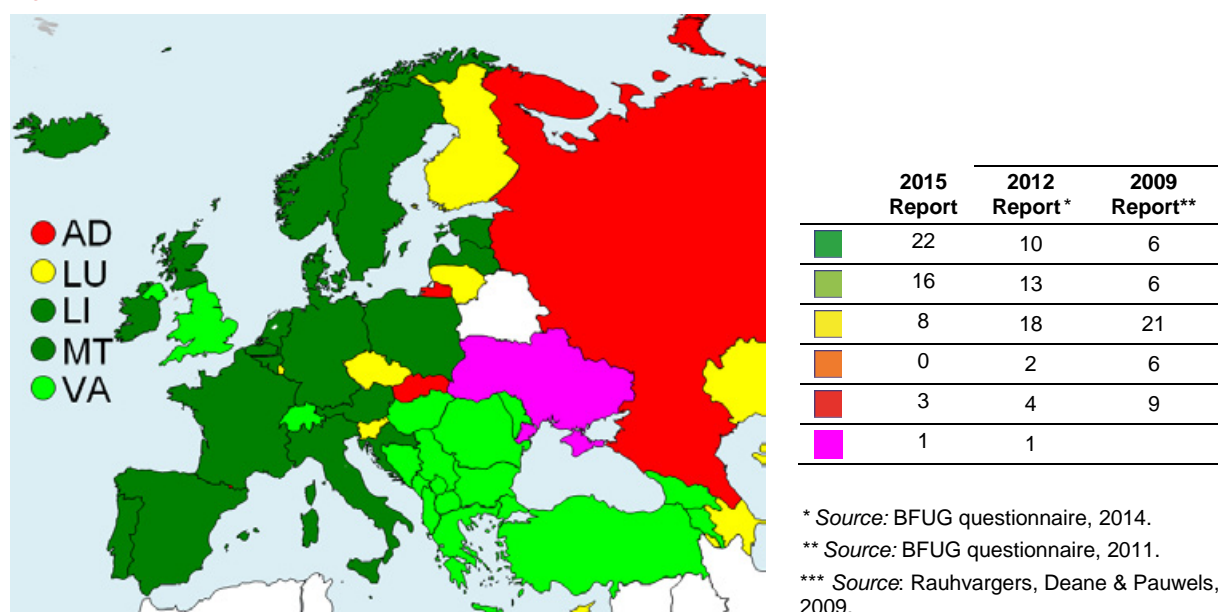
2.2. Bologna tools

2.2.1. National qualifications frameworks¹¹

Twenty two countries have completed have fulfilled all the 10 steps in implementation of qualifications frameworks comparing to ten countries in 2012 and eighteen more countries are following (Figure 2.21), but what is even more important, the number of countries still in the first three steps of implementation – there are three such countries compared to nine countries in 2012.

¹¹ Here and further referring to Qualifications Frameworks

Figure 2.21: Scorecard indicator n°3: Implementation of national qualifications frameworks, 2013/14*



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

Note: 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.

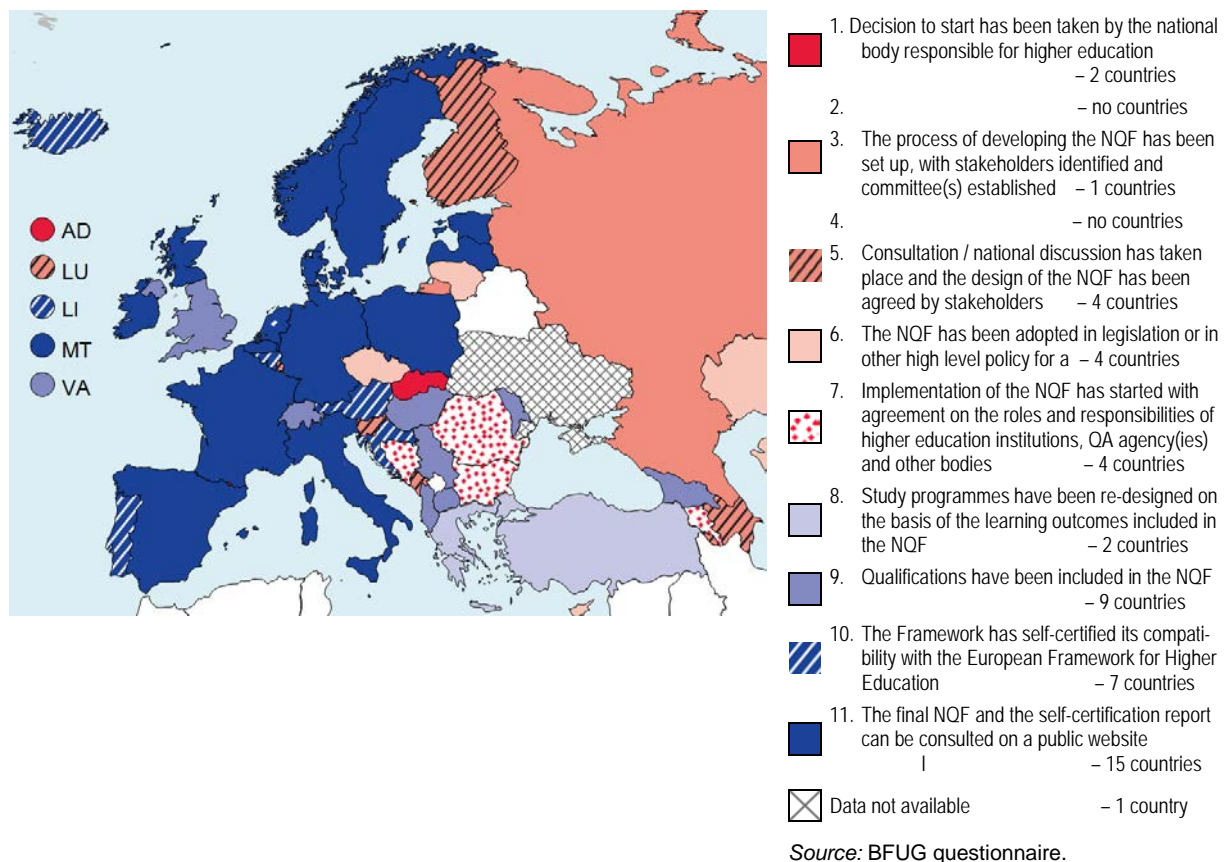
Figure 2.22 shows the breakdown of countries by each step of implementation. Fifteen countries, namely Flemish speaking community of Belgium, Denmark, Estonia, France, Germany, Ireland, Italy, Latvia, Malta, Netherlands, Norway, Poland, Spain, Sweden and United Kingdom (Scotland) have fulfilled all the steps in implementation of qualifications frameworks and have the self-certification report can be consulted on a public website compared to while Austria, Croatia, Iceland, Lithuania and Portugal miss only information on qualifications frameworks on a public website.

Next group of ten countries, namely Albania, The former Yugoslav Republic of Macedonia, Georgia, Holy See, Hungary, Moldova, Serbia, Spain, Switzerland and United Kingdom (England, Wales and

Northern Ireland) that have Qualifications have been included in the NQF but who have not yet self-certified its compatibility with the European Framework for Higher Education the national framework. Georgia and Turkey are the phase when qualifications have been included in the NQF. In Armenia, Bosnia-Herzegovina, Bulgaria, Montenegro and Romania the implementation of the NQF has started but the 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 the practical implementation has not yet started in Czech Republic, Kazakhstan and Lithuania. 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 at NQF is made.

Altogether, eight countries still do not have legislation for NQF, and another four countries have legislation but have not started practical implementation at all.

Figure 2.22: Progress in development of national qualifications frameworks according to the 11 steps, 2014*



* No countries at Step 2 and step 4 are not

According to the Structural Changes Working Group¹², in 2014, the Network of National Correspondents for Qualifications Frameworks conducted a small survey on the development of national qualifications frameworks for higher education. 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

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

countries. It should be underlined that developing national higher education frameworks requires a development process within each system and that this development takes time, particularly, the same countries reporting not having their NQFs in place also reported that they plan to develop and self-certify their national frameworks by 2016. Countries with NQFs developed more than 10 years ago, reported that the NQF is now an integrated part of study programs, especially through the use of learning outcomes.

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 for higher education qualifications; for the other half, they are open to VET qualification either directly within the higher education framework or via a double entry system. In a majority of countries still face challenges in including non-formal qualifications within national higher education frameworks self-certified against the QF-EHEA.¹³

At least fifteen countries have made substantial progress in the implementation of national qualifications frameworks. 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.

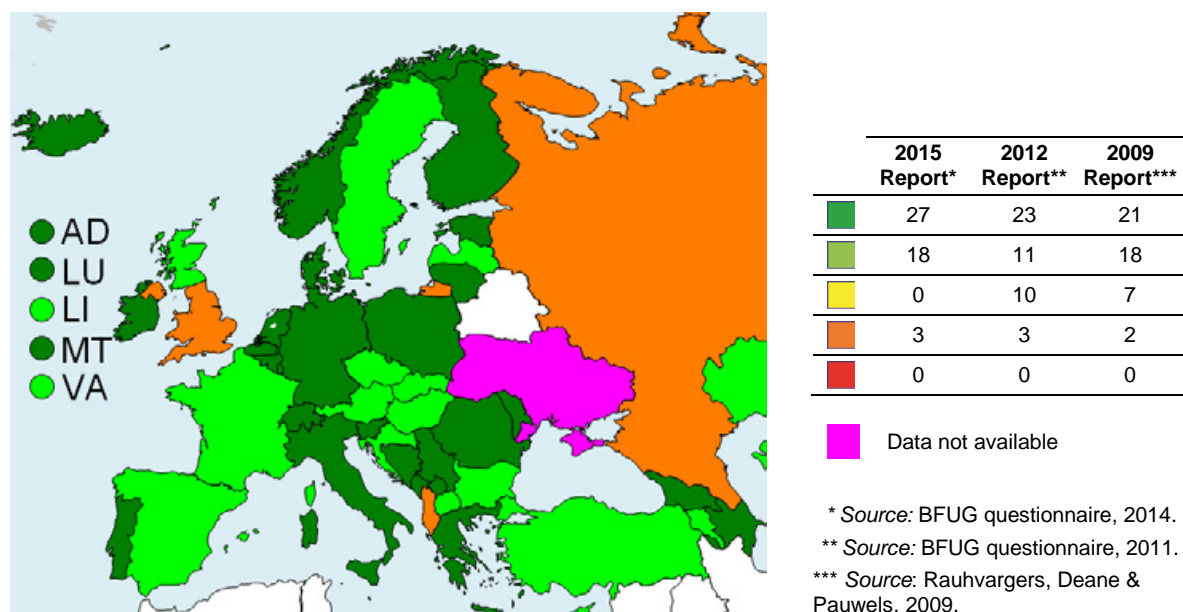
A majority of countries still face challenges in including non-formal qualifications within national higher education frameworks self-certified against the QF-EHEA.

2.2.2. ECTS, learning outcomes and student centred learning

44 countries are in the dark or light green categories compared to 34 in 2012 and the four remaining countries are in orange zone: in Albania, Russia, United Kingdom (England, Wales and Northern Ireland) in which ECTS credits are allocated in less than 75% programmes, and Sweden where the national credit system that is not compatible with ECTS. Other countries with national credit systems Bulgaria that are compatible with ECTS, Hungary, Kazakhstan, Latvia, Russia, and United Kingdom (England, Wales and Northern Ireland).

¹³ *ibid.*

Figure 2.23: Scorecard indicator n°8: Stage of implementation of ECTS system, 2013/14*

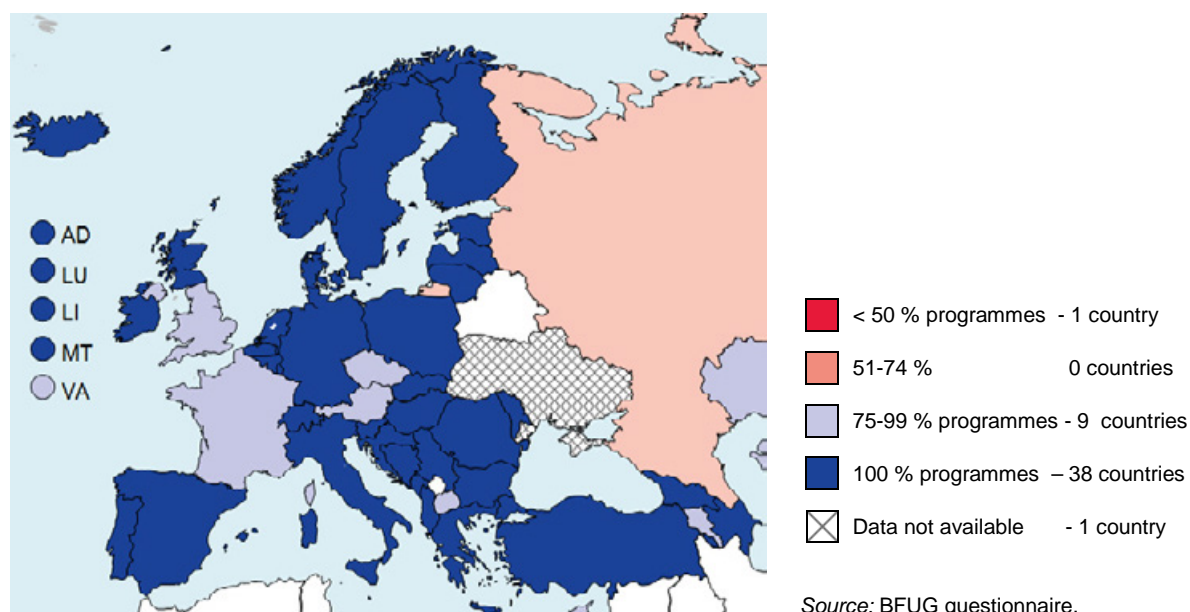


Scorecard categories

- ECTS credits are allocated to all components of all HE programmes, enabling credit transfer and accumulation AND 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

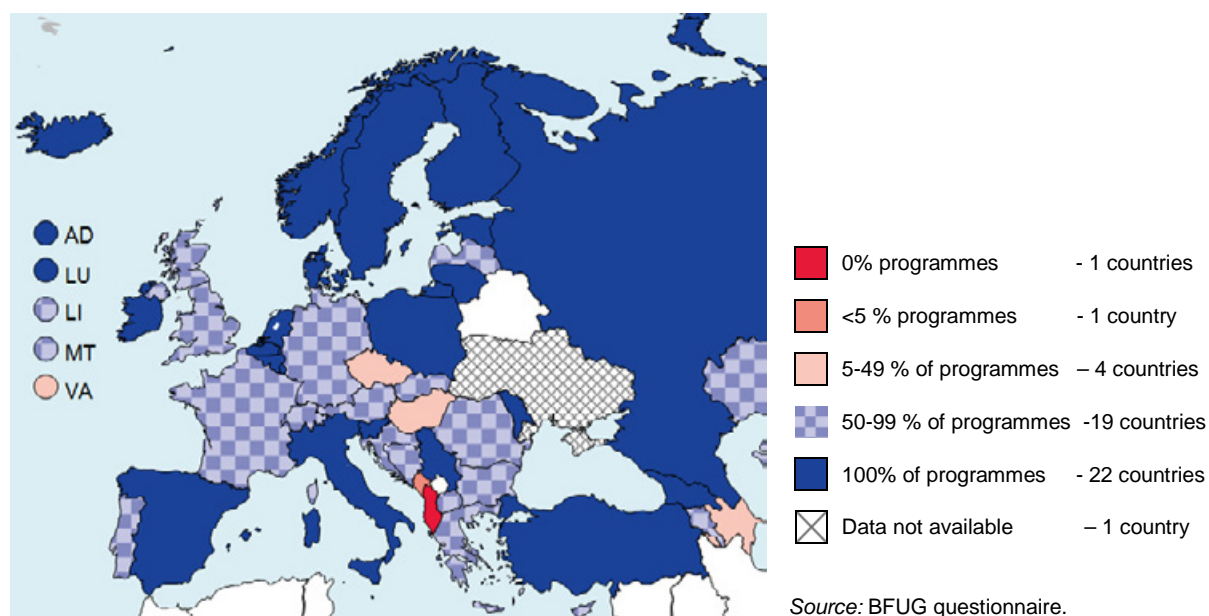
A comparison of Figures 2.16 and 2.17 shows that linking credits with learning outcomes has been implemented to a far lesser extent than the use of ECTS for credit transfer and accumulation. Indeed it is the linking of credits with learning outcomes that hinders the full implementation of ECTS.

Figure 2.24: Share of programmes using ECTS credits for accumulation and transfer for all elements of study programmes, 2013/2014



There is progress in implementation of ECTS. In 38 countries (Figure 2.24) ECTS is used for both accumulation and transfer while all programmes but in other 19 countries – in 75-99% of programmes compared to 30 and 7 countries respectively in 2011. In those two aspects of ECTS implementation is close to completion.

Figure 2.25: Extent to which ECTS credits are linked with learning outcomes in higher education programmes, 2013/2014



In 22 higher educational systems (Figure 2.25) HEIs have linked all the parts of programmes to learning outcomes and next 19 countries have done so for 50-99% programmes.

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

Although the dimensions are different, comparison between the Figures 2.24 and 2.25 shows that while using ECTS of accumulation and transfer is nearly fully implemented but – it is the case in 38 countries ECTS is used for both accumulation and transfer while in only 22 countries all programmes are linked with learning outcomes.

The new ECTS Guide which has been developed and submitted to Ministerial Conference in Yerevan on 14-15 May, 2014, 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 WG 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

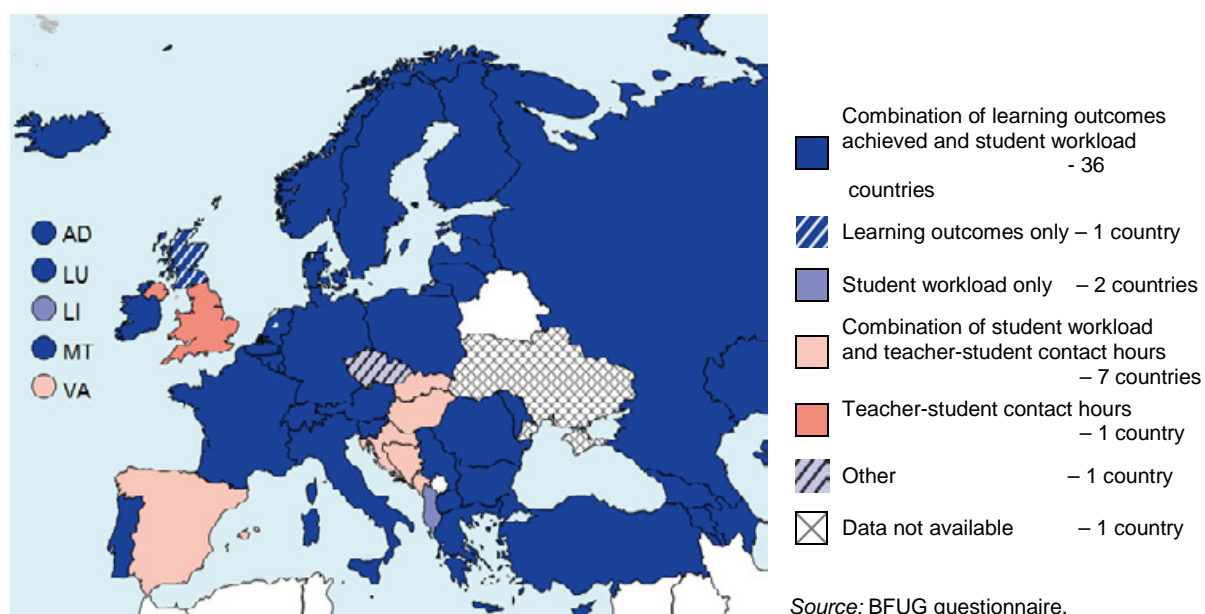
There is progress in ECTS implementation. Using ECTS for both accumulation and transfer is implemented to some extent practically everywhere. Linking credits with learning outcomes has progressed as well, but more efforts are needed.

Credit allocation

It has been agreed that credits are allocated on the basis of learning outcomes achieved and student workload: student has fulfilled the prescribed workload and has achieved the expected learning outcomes and 35 countries follow this pattern, see Figure 2.26. The second largest group of 8 countries (Bosnia-Herzegovina, Croatia, Holy See, Hungary, Montenegro, Slovakia, and Spain) allocate the credits on the bases of 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, achieving the student learning outcomes only in United Kingdom (Scotland), United Kingdom (England, Wales and Northern Ireland) allocate credits according to teacher-student contact hours and, finally Czech Republic may use learning outcomes with either student workload or teacher-student contact hours.

¹⁴ Ibid., p.76

Figure 2.26: Basis to award ECTS credit in the majority of higher education institutions, 2013/14



Understanding and usage of learning outcomes

National steering towards use of learning outcomes for curriculum development. Steering or encouraging the use of learning outcomes through national policies is stipulated in legislation in 32 higher education systems while 14 encourage learning outcomes through guidelines or recommendations. In just two countries (Albania and Hungary), there is no central encouragement of learning outcomes at all. (see Figure 2.27). Compared to previous year, seven more countries encourage usage learning outcomes through laws or steering documents. This shows that, importance of learning outcomes in programme development has grown.

In 2015 Report, the steering or encouraging for using learning outcomes in student assessment was measured separately (Fig. 2.28). The results show that the importance of use of learning outcomes for student assessment has not yet been fully understood.

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.

Figure 2.27: Steering and/or encouraging use of learning outcomes in national policy for programme development, 2013/14

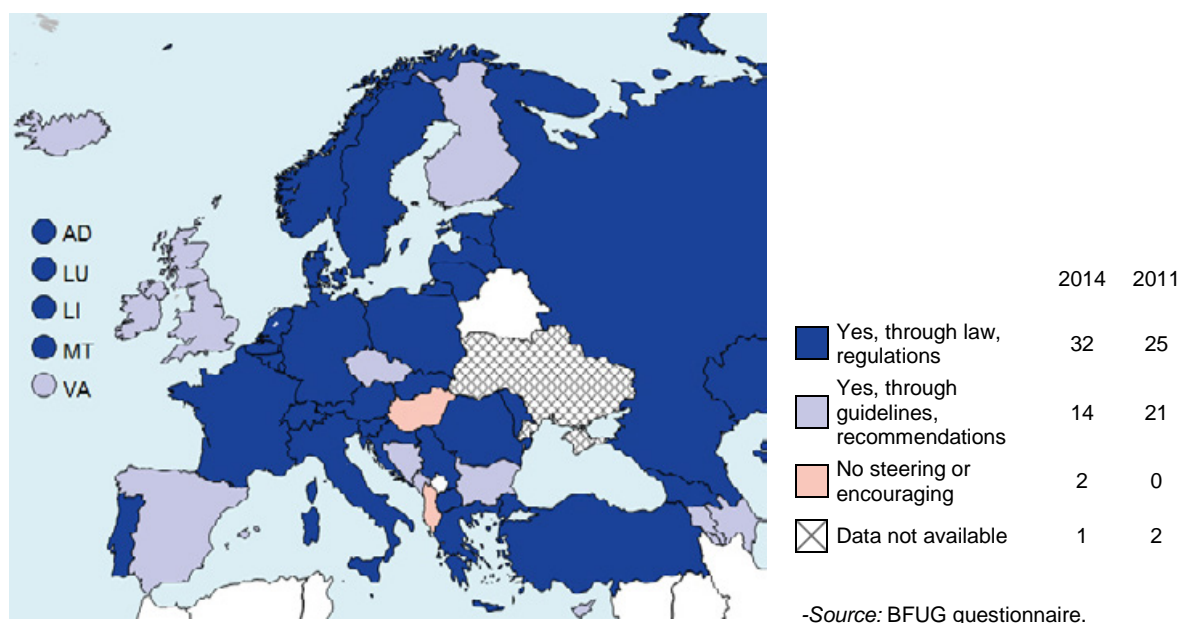
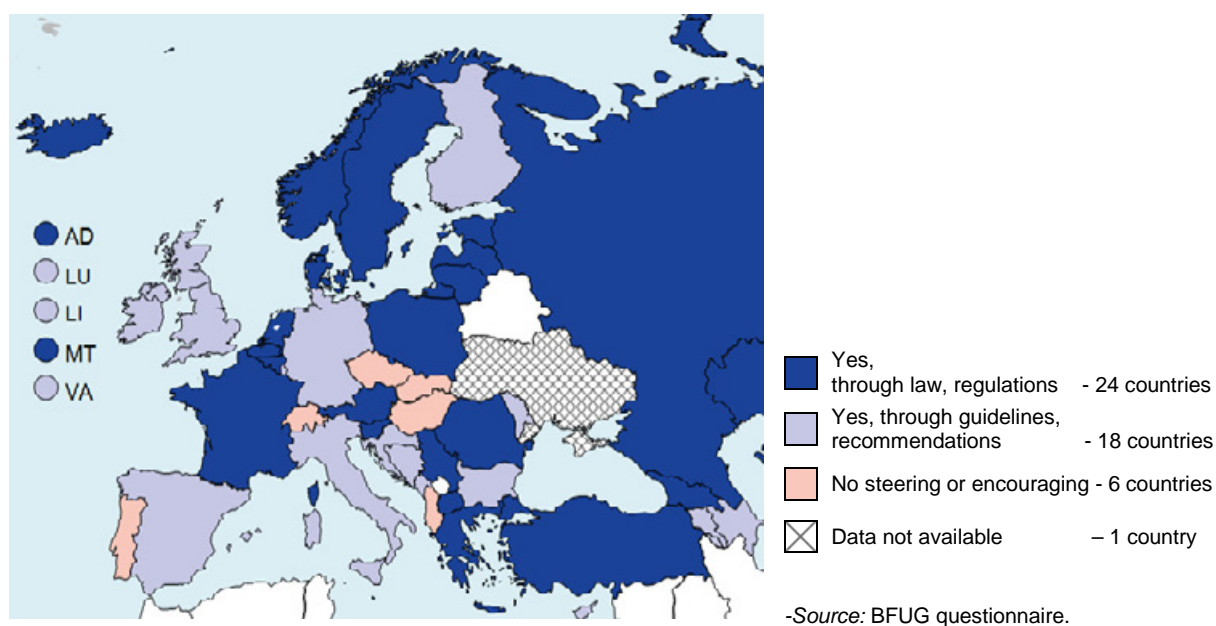


Figure 2.28: Steering and/or encouraging student assessment procedures to focus on learning outcomes, 2013/14



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 introduce the structural changes. The precondition for proper introduction of learning outcomes and even more introduction of student assessment which clearly demonstrates whether the learning outcomes actually have been achieved, is a change of paradigm moving from teacher-centred to student-centred.

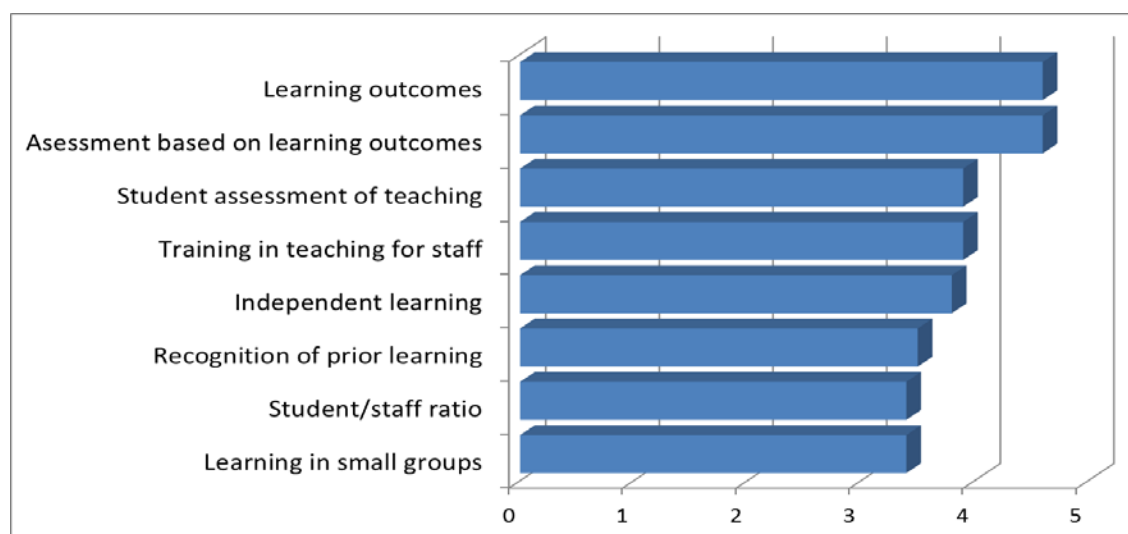
The findings suggest that those countries that choose not to make a learning outcomes approach compulsory through laws and regulations should step up their activities to encourage implementation of a learning outcomes approach.

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, ME, Slovakia, Switzerland and. 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 2.29). It appears that the perception of the elements student centred learning sharply differ 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 2.29 A and B).

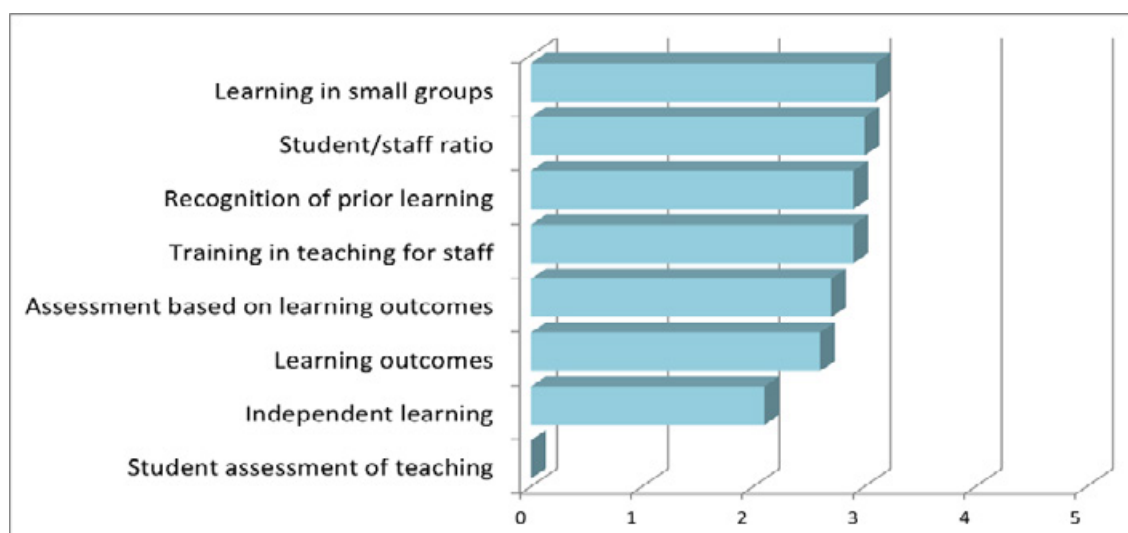
Figure 2.29: Importance of elements of student-centred learning in the eyes of EHEA countries (of total score 5), 2013/14

A – Results for countries where steering documents mention the concept of student-centred learning



Source: BFUG questionnaire

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



For Group A countries, as in the 2012 report, the two most valued elements clearly are the learning outcomes and assessment based on learning outcomes which score 4.6 out of total score 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 ratio and in small groups are scored at 3.4 out of score 5.

As regards the Group B, both the sequence of aspects of student-centred learning and their scores strongly differ with the bulk of the countries. Average score of all the aspects is 2.4 out of total score 5 while in the Group A it was 4.0. The above demonstrates that the countries which don't mention the concept of student-centred learning in their laws or steering documents do not do so because they do not value the student-centred learning altogether. Furthermore, while in Group A the highest scored aspects were using learning outcomes and assessment based on learning outcomes, in Group B the highest ranks are given to learning in small groups and student-staff ratio which were least valued by countries of Group A. The least valued in Group B in turn are the student evaluation of teaching which received score zero, followed by independent learning and use of learning outcomes.

In the great majority of countries (39) 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 student-centred learning are not considered useful. The most critical problems for these countries are their lack of esteem for student evaluation of teaching, independent learning and the use of learning outcomes.

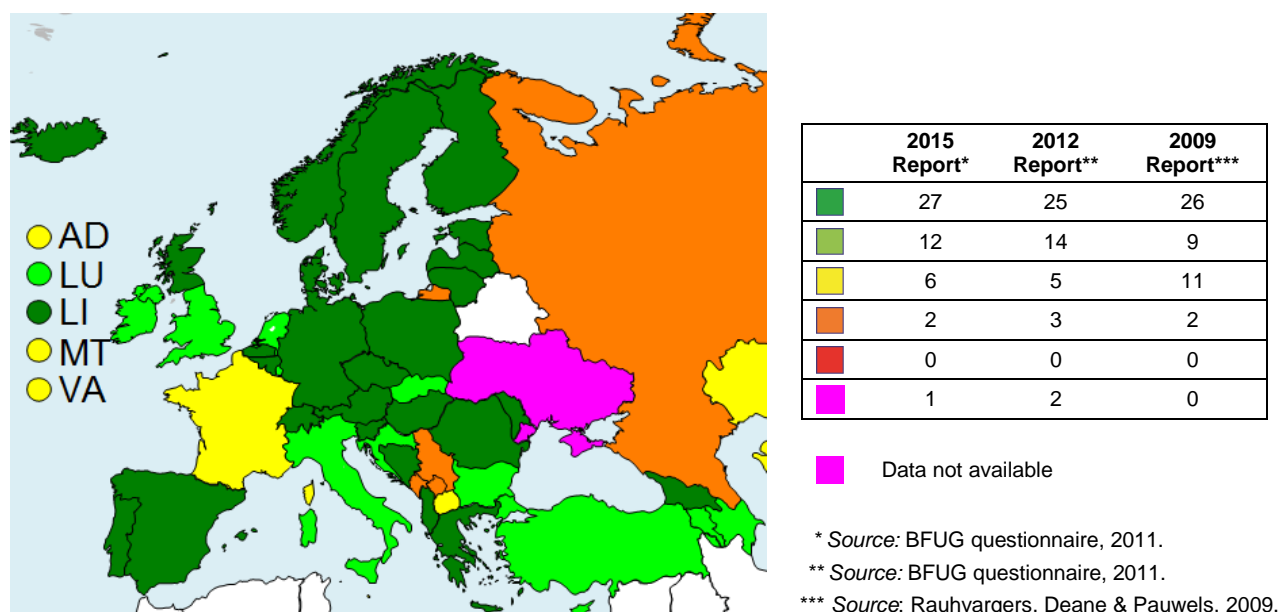
2.2.3. Diploma Supplement

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. In addition to country scores in the Diploma Supplement indicators (Figure 2.30), the data submitted by countries show that all the countries have at least started the implementation of Diploma Supplement. The main issue in implementation is issuing Diploma Supplement automatically: only 31 higher education systems (26 in 2012) while only two countries issue Diploma Supplement for a fee – Montenegro, Serbia and for some groups of

students in Russia) and just four countries fail to issue of Diploma Supplements to some students or in some programmes (Albania, France, Greece and Kazakhstan).

Figure 2.30: 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

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

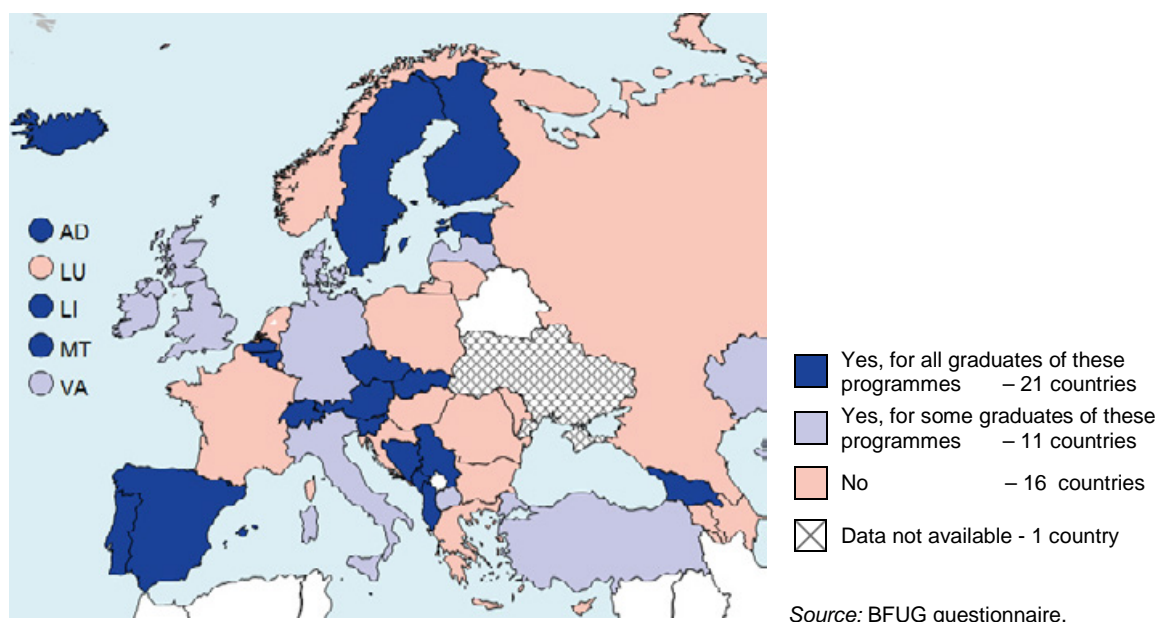
- 1) Diploma Supplement should be issued to every graduate
- 2) Diploma Supplement should be issued automatically,
- 3) Diploma Supplement should be issued in a widely spoken European language;
- 4) Diploma Supplement should be issued free of charge.

All countries issue Diploma Supplements in widely spoken European language but in some cases only on request (Andorra, Azerbaijan, Russia, Serbia and Slovakia). Most countries choose English language as the main non-national language for DS. Several countries, for instance, Romania, Spain and Turkey also offer DS in other widespread languages – French, German, Italian or Spanish. In

Bosnia-Herzegovina and Switzerland HEIs issue diploma supplements in various official languages plus English. Similarly, in the former Yugoslav Republic of Macedonia and Hungary DS is issued in official language, minority languages where appropriate and in English. As regarding countries whose language is widely spoken in Europe, 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), but 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 fee – Montenegro, which introduced such fees since year 2013/14, Serbia and Russia. The size of the fee is known only for Serbia and it varies between 50 and 100 Euro.

Figure 2.31: Issuing Diploma Supplement to graduates in the third cycle, 2013/14



As regards the issuing Diploma Supplement to third cycle (Fig.2.31), it 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.

National monitoring of the effectiveness of the Diploma Supplement.

Fourteen higher education systems (against seven in 2012) – Austria, the French Community of Belgium, Croatia, Finland, France, Germany, Kazakhstan, Moldova, Montenegro, the Netherlands, Norway, Serbia, and United Kingdom reports that it has launched studies to monitor how higher education institutions use the Diploma Supplement.

Checking how employers use the Diploma Supplement is rare: just four countries survey employers. In France the information gathered by the ENIC-NARIC centre demonstrates that employers rarely use the diploma supplement. In Germany, in in contrary, the survey shows that more than 70% of the German employers consider the issuing of the Diploma Supplement as important, but nearly 50% of the employers consider 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 from employers, but the latter would like to see DS more

informative from the point of knowledge skills and competences of diploma holder and are ready to cooperate with HEIs on this regard.

The bodies carrying out monitoring the implementation of Diploma Supplement vary widely. Such body can be, for instance, the ministry (French Community of Belgium, Kazakhstan, Lithuania and Moldova), National Board of Education (Finland), inspectorate (the Netherlands, Serbia), quality assurance agency (Norway), Rectors' Conference (Germany), but in the United Kingdom it is the UK Higher Education International Unit.

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.

2.3. Recognition of qualifications

Recognition has been at the heart of the Bologna Process since its inception. If we make the exercise of counting the occurrences of the term “recognition” in the ministerial communiqués since then, recognition was mentioned more than 70 times. Beyond the textual evidence of the importance given by the European ministers to the recognition topic, many achievements have shown how recognition might be considered both as an operational objective and as an instrument to pursue other operational objectives, which would enable the full implementation of the European Higher Education Area.

In their Bucharest Communiqué the EHEA ministers in charge of higher education underlined 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”. The Lisbon Recognition Convention (LRC) and its subsidiary texts is a cornerstone of the EHEA, providing a common and agreed legal basis for recognition in the region but also being the only binding text of the EHEA. In the last two decades, various instruments have been developed, and adopted at the European, national, regional and institutional level aiming at facilitating fair recognition of foreign qualifications and/or study periods abroad. Those instruments are amongst others, the ENIC/NARIC networks, the ECTS, the Diploma Supplement, the overarching and national qualifications frameworks, the European Standards and Guidelines for Quality Assurance of Higher Education and others. Despite those many efforts, fair recognition remains a problematic issue that needs further commitment of European countries, governments, institutions and other stakeholders.

Regarding the recognition issues, ministers in Bucharest:

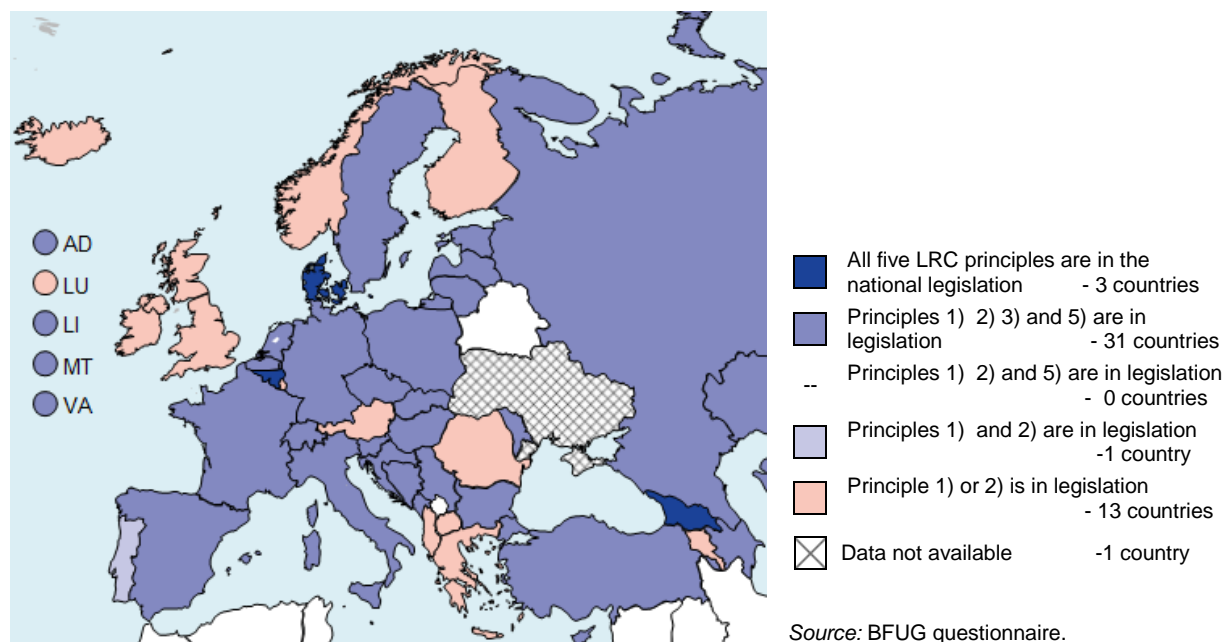
- committed to reviewing the national legislation to comply with the Lisbon Recognition Convention;
- encouraged the higher education institutions and quality assurance agencies to assess institutional recognition procedures in internal and external quality assurance;
- welcomed the European Area of Recognition (EAR) Manual and promotion of it as a set of guidelines for recognition and a compendium of good practices;
- express their commitment 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 and supported the work of a pathfinder group of countries exploring ways to achieve the automatic academic recognition of comparable degrees.

Implementation of the Lisbon Recognition Convention

LRC principles in the national legislation. The Figure 2.32 shows to which extent the main principles of the LRC are specified in national legislation.

Figure 2.32: Principles of the Lisbon Recognition Convention in national legislation, 2014



All five Lisbon Recognition Convention principles are specified in the national legislation, namely:

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

Lisbon Recognition Convention principles 1) 2) 3) and 5) are specified in the national legislation

Lisbon Recognition Convention principles 1) 2) and 5) are specified in the national legislation

Lisbon Recognition Convention principles 1) and 2) are specified in the national legislation

Lisbon Recognition Convention principles 1) or 2) are specified in the national legislation

No data

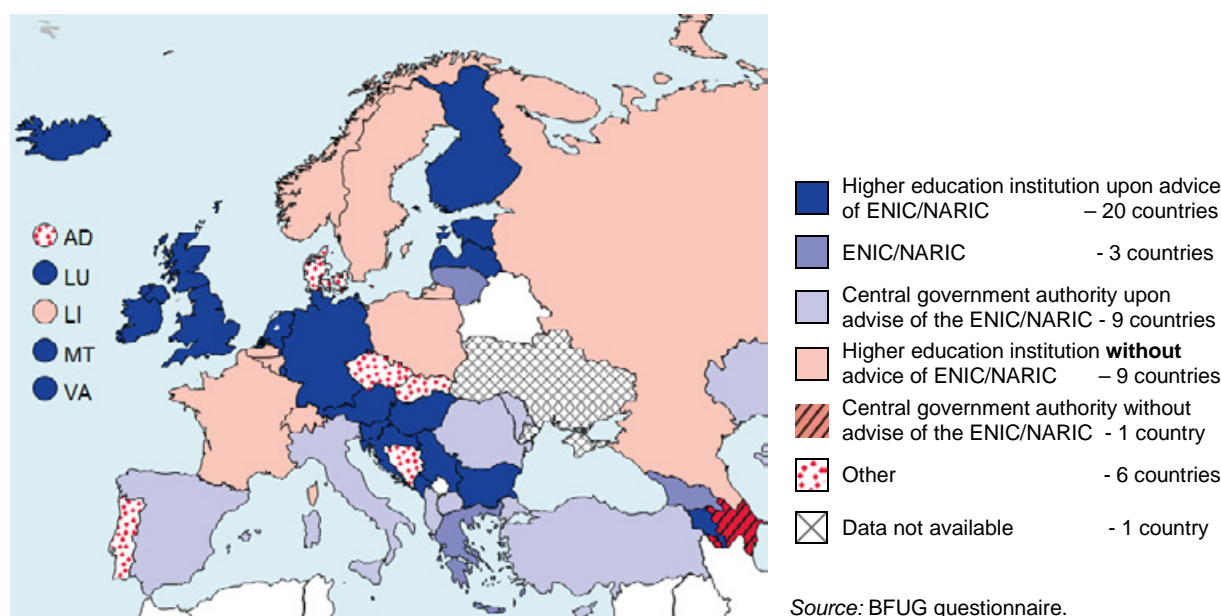
In only 3 countries – Denmark, French Community of Belgium, and Georgia - all the five main principles of the LRC are specified in the national legislation. In 31 countries the legislation specifies four of the main LRC principles, leaving out the principle that in cases of negative decisions, competent authority has to demonstrate the existence of substantial difference. One country – Portugal have specified in two of the five LRC principles in the legislation.

The group of 13 countries that have one or none of the LRC principles in the national legislation is not homogenic. Particularly, some countries which have not LRC principles in the national legislation are

known for using those principles in practice. This finding underlines once again that the formal compliance to the LRC and its subsidiary legal texts does not guarantee proper implementation and vice versa – a country may have fair recognition practices in place without having LRC principles in national legislation.

Institution which makes final decisions on recognition. In 2014, the survey asked more detailed data than in 2011 regarding on which organisation is making final decisions on the recognition of foreign qualifications for academic purposes. Figure 2.33 shows that in the largest group of countries – 20, recognition decisions are taken by higher education institution whose decision is made based on ENIC/NARIC centre advice, thus HEIs make autonomous decisions, but at the same time use the experience and knowledge of the national ENIC/NARIC centre. In next group of 9 countries (Belgium, France, Liechtenstein, Norway, Poland, Russia, Sweden, Switzerland), HEIs make autonomous decisions on recognition without advice of ENIC/NARIC. In this case, HEIs should hire specialists in recognition who are familiar with foreign higher education systems and the principles of recognition. If a HEI does not employ such specialists, it risks making low-quality decisions.

Figure 2.33: Institution which makes final decisions on recognising foreign qualifications for academic purposes, 2013/ 2014



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

In another group of nine countries (Albania, Cyprus, The former Yugoslav Republic of Macedonia, Italy, Kazakhstan, Moldova, Romania, Turkey), final decisions of recognition are made by central government authority (ministry) upon advice of the ENIC/NARIC. This option involves the knowledge and experience of the ENIC/NARIC centre, but the HEIs are not involved in decision making when decision is made regarding their future students.

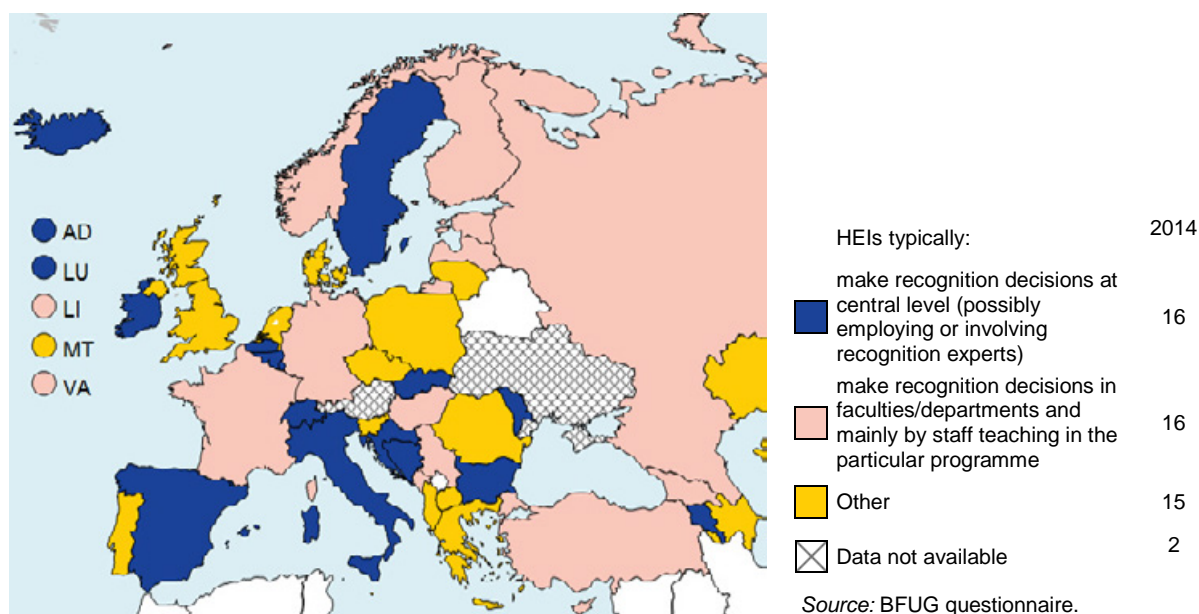
ENIC/NARIC centres make decision in other 3 countries (Georgia, Greece and Lithuania). This case actually is similar within the previous one with the difference that ENIC/NARIC centres not only evaluate credentials, but also make decisions. In this case the knowledge of recognition specialists is used, but the higher education institutions are not part of decision making while the decision is made regarding their future students.

In six countries have specific other situations. In Andorra, a government institution acts as ENIC and makes decisions. Similarly, Danish ENIC/NARIC office is the central authority situated within the Ministry of Higher Education and Science and its decisions are legally binding for institutions concerning decisions on access, while institutions take autonomous decisions concerning. In Bosnia-Herzegovina there is no single system of recognition due to different legislation in different federal parts of the country. In the Czech Republic, the recognition case is decided by a Czech Republic HEI which have a programmes similar to the one that the applicant has graduated from. In Portugal there are two systems – 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”.

Data on Figure 2.33 show that 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 undertaken without consulting ENIC/NARIC centres, and recognition of foreign qualifications is carried out by higher education institutions without the advice of ENIC/NARIC centres in 1/3 of countries, it is important to ensure that higher education institutions have the capacity and knowledge to undertake this role.

Figure 2.34: Do higher education institutions typically make recognition decisions centrally? 2014/14



It is assumed that evaluation and recognition of a foreign qualifications or parts of them works better if it is done at a central of the HEI, possibly employing or involving recognition experts. Figure 2.34 shows that in 16 countries HEIs typically make recognition decisions at central level (possibly employing or involving recognition experts) and in another 16 countries HEIs typically make recognition decisions in faculties/departments and mainly by staff teaching in the particular programme. In addition, there are 15 countries where it is being done different.

When asked what measures exist to ensure that the LRC are implemented in practice, typical answers were as follows. Highest number of countries answered that they have provisions for appeal, though most of them mention appeal through court – although the recommendations in the LRC subsidiary texts state that for a foreign student appealing to court may not be a simple exercise. The next comes

the national laws, regulations, guidelines, instructions, etc. which make the LRC principles binding to HEIs. Another often mentioned measure was that transparency, publication of the procedures and also the outcomes. A number of countries mention help of the ENIC/NARIC centre in the form of consultations, help in assessment itself, training of HEI staff, but some countries also mention supervision and monitoring and even inspection of the institutional recognition procedures and practices. Finally, some countries have mentioned the improvement through internal quality assurance and the use of the EAR Manual.

New activities to improve recognition

Including the institutional recognition procedures into the quality assurance. As the higher education institutions are autonomous, countries often report that they cannot influence the HEIs and order them to implement the principles of the LRC. In their report of 2012 the EHEA Working group asked quality assurance agencies to include compliance of the institutional recognition procedures with the legal framework of the LRC into issues covered by internal and external quality assurance and to include those points when revising the ESG. The wording in the final draft of the ESG:

„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 their 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.¹⁵

When properly implemented, the above changes of the ESG should strongly improve the recognition procedures and their application within HEIs.

European Recognition Area Manual for Higher Education In 2012 a European Recognition Area (EAR) Manual was launched. As a second step, the EAR Manual for Higher Education Institutions¹⁶ produced by eight ENIC/NARIC¹⁷ centres was launched in 2014. 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, this manual can be used by credential evaluators from all countries that are party to the LRC, e.g. some countries of North America, Asia and Oceania or who have a similar regional convention e.g. 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. It is the intention of the authors that this manual will foster a fair recognition culture and support quality enhancement in recognition procedures according to the principles of the LRC.

¹⁵ 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.

¹⁶ The European Recognition Manual for Higher Education Institutions. NUFFIC, 2014, 145 p. Internet: <http://eurorecognition.eu/Manual/EAR%20HEI.pdf>

¹⁷ The eight national ENIC/ NARIC centres: (NUFFIC, project leader), Danish, Irish, French, Latvian, Lithuanian, Polish and United Kingdom

As a next step, STREAM project has been launched in order to create an internet training and experience exchange platform for various groups of HEI staff: admissions officers, credential evaluators, administrators, various teaching staff levels as well as holders of foreign qualifications or credits, students etc. with different levels of previous knowledge of recognition.

Three actions should improve recognition within higher education institutions:

- 1) Including institutional recognition procedures in the ESG
- 2) Developing the European Recognition Area Manual specifically for the use of higher education institutions
- 3) Developing the training platform for various levels of staff, students and holders of foreign credentials or study periods abroad

Work towards 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 to study feasibility of establishing 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 HEIs with a survey¹⁸.

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".

An important finding of the group is that the automatic recognition of qualifications at system level¹⁹, 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.

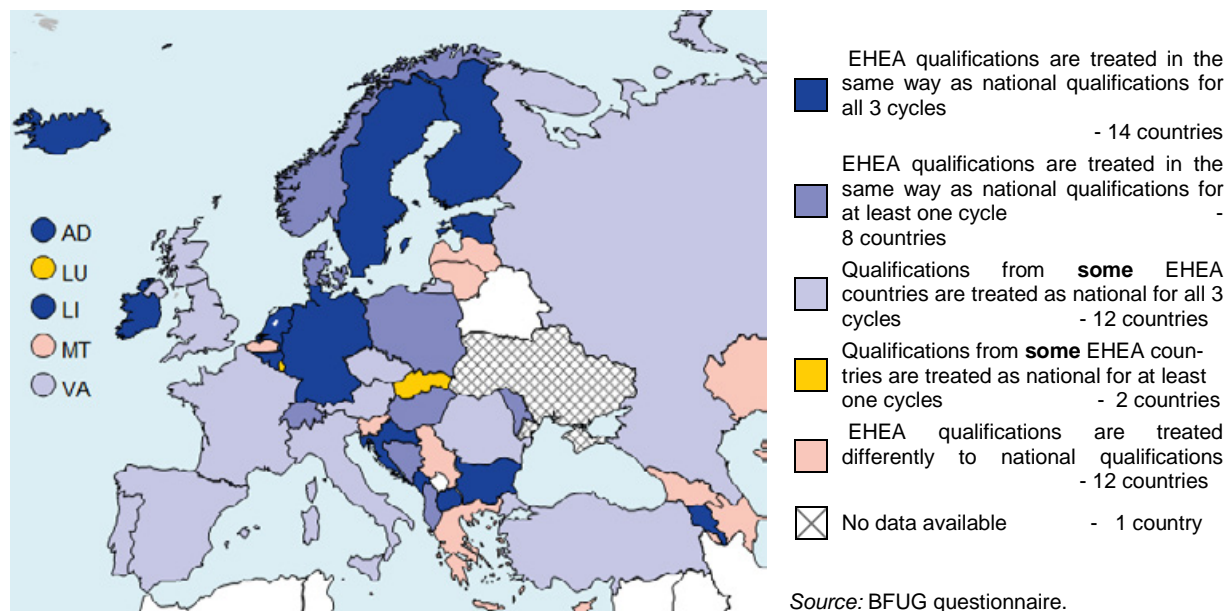
According to the BFUG survey, in 14 countries EHEA qualifications are treated in the same way as national qualifications for all three cycles, see Figure 2.35, but in another 8 countries EHEA qualifications are treated in the same way as national qualifications for at least one cycle. In 12 countries 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.

¹⁸ For details consult the Report of the Pathfinder Group ([.... internet address](#))

¹⁹ „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.

Nearly three fourth of the countries, qualifications from at least some of the EHEA countries are treated in the same as the 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 2.35: System-Level recognition of three cycle degrees, 2014/14



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.

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).

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 HEIs 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 HEIs; 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.

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 Lisbon Recognition Convention; 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.

Conclusions of Chapter 2

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 their readability and international comparability.

Bologna tools

At least fifteen countries have made substantial progress in 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 their 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.

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 European Standards and Guidelines for Quality Assurance (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."

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 European Standards and Guidelines, 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 stressed the fact that, although the European Quality Assurance Register 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 Standards and Guidelines for Quality Assurance in the European Higher Education Area (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 looks at the range of issues and challenges being addressed by quality assurance.

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 European Standards and Guidelines, follow these principles. This report therefore also looks firstly at the role of higher education institutions in developing robust internal quality assurance systems. However, as this report has no direct input from higher education institutions themselves, information on internal quality assurance systems is necessarily limited to an overview of what different national systems require of 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, Hungary 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 influencing their autonomy. Notably, several countries point out that the external quality assurance framework is tightly defined, and that, 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 itself limits substantially their margin for manoeuvre.

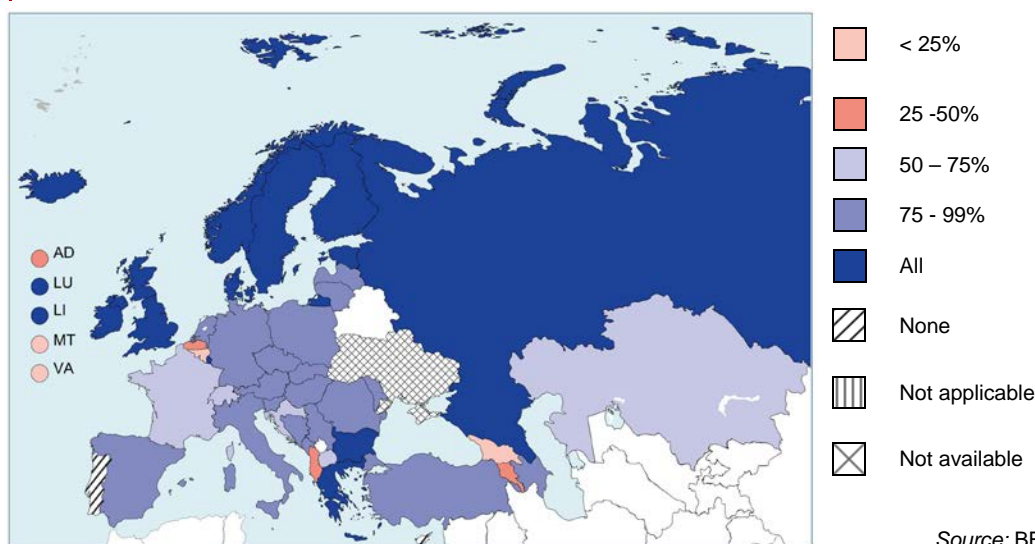
3.1.3. Institutional strategies for continuous quality improvement

Many countries report positive findings regarding the number of institutions that have published a strategy for continuous quality improvement in the past 5 years. Indeed, 24 national systems consider this number to be in excess of 75 % of their higher education institutions, with 7 systems claiming that all higher education institutions have published such a strategy. However, although this estimation

remains high, it represents a slight decrease 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 four systems estimate that less than 25 % of institutions have published such a strategy, compared to 11 in 2012. Four systems estimate 25 - 50 %, and six estimate between 50 and 75 %.

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



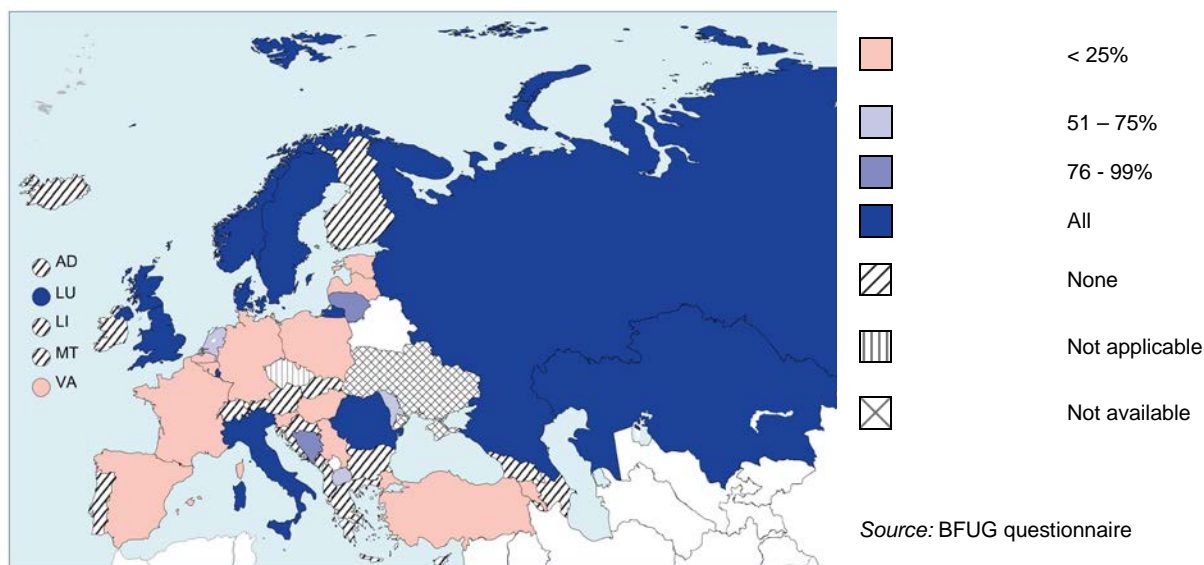
3.1.4. Publication of critical and negative evaluation reports

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 6 systems indicated that all institutions publish these reports while, as shown in Figure 3.2, this number has now risen to 14.

At the other end of the scale the number of systems which stated that none of their institutions publish such reports was 22 in 2012, while now it is 15. In 2012, a further 11 systems indicated that less than 25% of institutions publish such reports, while this time 15 systems estimated that their institutions are in 15.

These changes suggest that there are likely to have been system changes obliging higher education institutions to publish outcomes of quality assurance reviews – whether they are critical or not. However, there are also a considerable number of countries that point out that negative outcomes will be publically available, but are not published by the higher education institutions themselves. Typically it would be the Quality Assurance agency that publishes this information.

Figure 3.2: Publication of critical and negative outcomes by higher education institutions, 2013/14



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. 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 3.3. Responsibility for external quality assurance, 2013/14

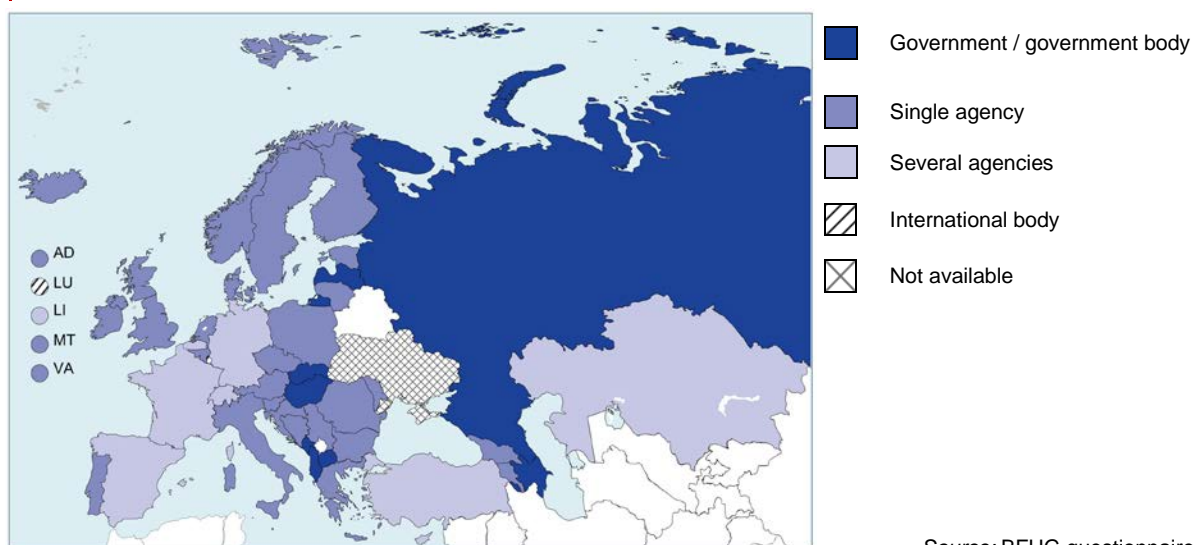


Figure 3.3 illustrates that the rise of quality assurance agencies has been a major trend. Few countries retain a system where a Ministry or Ministry body has direct responsibility for quality assurance. This is the case only in Albania, Azerbaijan, "The former Yugoslav Republic of Macedonia", Montenegro, Russia and Slovakia. During a transition period, it is also the reality of Latvia, while the government aims at the development of an improved quality assurance system.

The development of the European Higher Education Area has certainly been a catalyst to this process with quality assurance clearly linked to establishing stakeholder confidence. When the European Standards and Guidelines (ESG) for quality assurance were adopted in 2005, this gave a boost to European cooperation in the domain. The European Association for National Quality Assurance (ENQA) provides a thriving forum for cooperation and engagement among quality assurance agencies, requiring its members to adhere to the European Standards and Guidelines, and promoting the exchange of good practice between agencies.

The European Quality Assurance Register for Higher Education (EQAR) 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 and acting as a gatekeeper for 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.

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 European Standards and Guidance (ESG) for quality assurance. This is the case for agencies in Bulgaria, Hungary and Sweden. In Iceland and Italy, the agencies have also not yet demonstrated their full compliance with the European Standards and Guidelines, and do not yet have full member status in ENQA. Agencies in a number of other countries have not applied for ENQA membership and have not undergone external evaluation to find out whether or not they comply with the ESG. This is the case for agencies in Andorra, Armenia, Bosnia and Herzegovina, Georgia, Greece, Kazakhstan, Liechtenstein, Malta, Moldova, Slovenia & Turkey.

One other country that does not use its own national quality assurance agency is Luxembourg. Here the government has put in place a system drawing strongly on international expertise based on committees of 7 experts acting independently. All other systems in the European higher education area are now functioning with professional quality assurance agencies.

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. 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 QA systems now focus on a combination of institutions and programmes (26) while only three systems - Belgium French Community, Czech

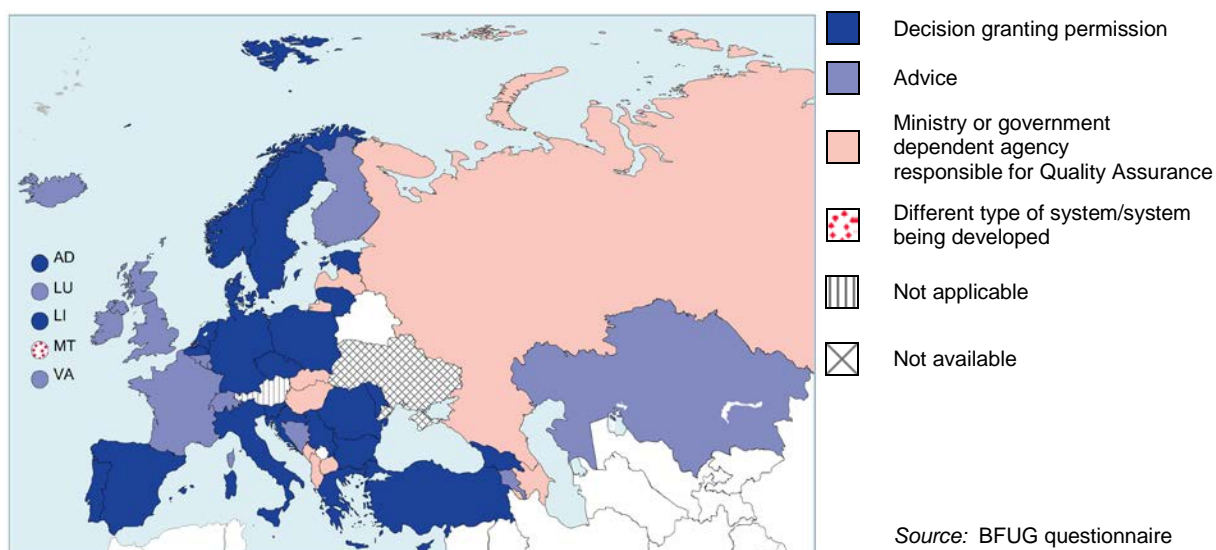
Republic and Sweden - now focus more exclusively on programmes (although in the French Community of Belgium there are also elements of institutional evaluation) and three countries – Bosnia and Herzegovina, Finland and the United Kingdom – focus on institutions. Overall, this picture suggests that quality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

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.

The majority of systems across the EHEA are, using this categorisation, more supervisory in character. Indeed 28 systems have established agencies with decision-making powers – including countries where the agency makes a proposal for decision and the government is responsible for actual decision. Fifteen have agencies that 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. Most commonly systems where quality assurance is enhancement oriented see little or no impact on funding. One exception to this rule is France, where although the system is enhancement oriented, the outcomes of evaluation are used in negotiations between the Ministry and higher education institutions that lead to decisions on funding. However, it is perhaps interesting to find out that, in 8 of the systems where evaluation may lead to a decision on whether a programme or institution may operate, there is otherwise no impact on funding. In the other cases where quality assurance systems are more supervisory in character, there is an impact, at least in some cases, on programme and/or institutional funding, from the decisions related to evaluation.

◆◆◆ Figure 3.4: Main outcome of external evaluation by QA agency, 2013/14



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 European Standards and Guidelines.

3.2.2. Focus of External Quality Assurance

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

The European debate on quality assurance has stressed the importance of trust between systems. One significant measure of the extent to which trust is developing, is whether governments enable higher education institutions to be evaluated by a quality assurance agency from another country when aware that the agency works in full compliance with the European Standards and Guidelines. Cross border quality assurance clearly has the potential to contribute positively and importantly to the

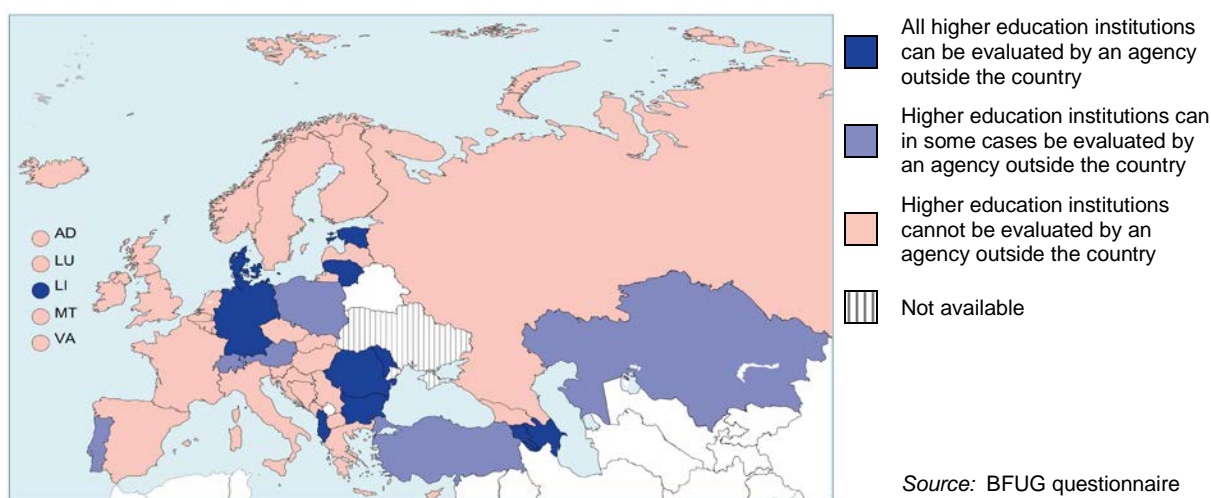
development of the European Higher Education Area, and working across borders is vital in the effort of learning from others in different systems.

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 it is therefore by no means self-evident that evaluation from non-national agencies will become commonly recognised in the EHEA, 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.

To address these aspirations and anticipate some of the legitimate concerns in working across borders, Ministers have adopted the European Standards and Guidelines for Quality Assurance (ESG) and established the European Quality Assurance Register (EQAR).

The question of whether higher education institutions are able to undertake an evaluation by an agency outside the country implies that the status and use of the evaluation would be equivalent to an evaluation by a national agency. The picture illustrated in Figure 3.5 shows that progress is, however, slow. Fourteen national systems claim that all their higher education institutions are free to be evaluated by foreign national agencies.

◆◆◆ Figure 3.5: Ability for higher education institutions to be evaluated by an agency outside the country, 2013/14

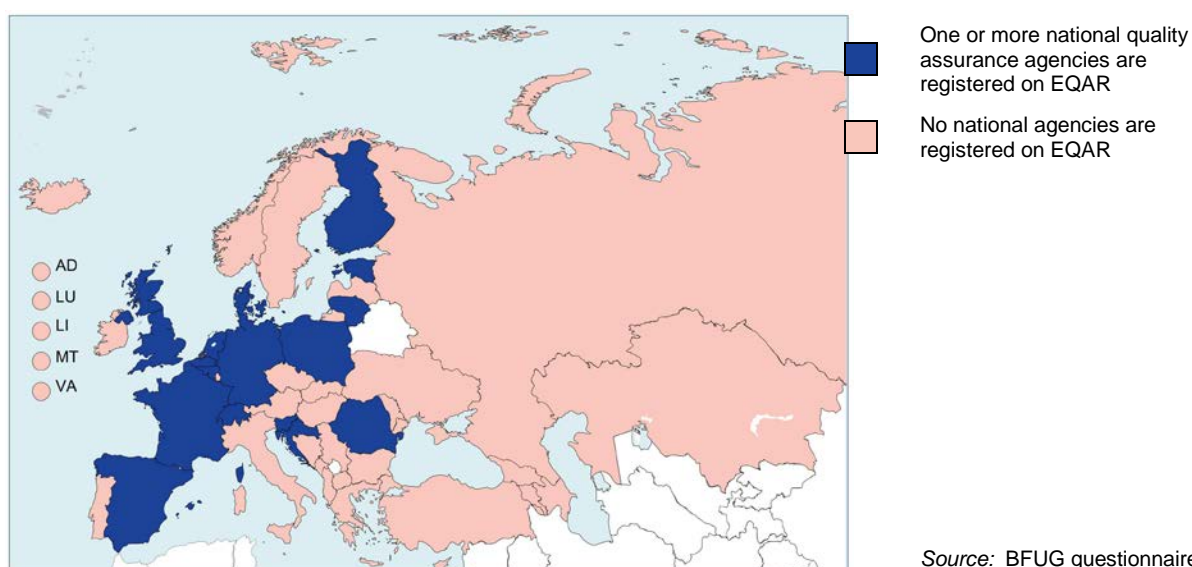


In some countries the possibility to undertake required external quality assurance with a foreign agency may be realised under certain conditions. In the Netherlands and the Flemish community of Belgium, institutional evaluation has to be done by the national accreditation agency. However, higher education institutions can ask an agency from outside the country to evaluate their programmes. While these evaluations of other agencies are treated in the same way as a national agency, formal accreditation decisions remain the preserve of the Dutch/Flemish quality assurance agency.

In other countries working with a foreign quality assurance agency may be possible for certain types of higher education institution only. 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.

◆◆◆ Figure 3.6: Quality Assurance Agencies registered on EQAR, 2013/14



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 examples of cooperation between national quality assurance agencies in evaluating higher education institutions and/or particular programmes.

The RIQAA project (Recognising International Quality Assurance Activity) 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.

3.2.4. 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 3.7 gives evidence of where public authorities encourage their own national quality assurance agencies to become members of ENQA and to register with EQAR. EQAR and ENQA both provide support to national agencies in strengthening their adherence to the ESG. ENQA promotes European co-operation and disseminates information and expertise among its members, while EQAR is based on adherence to the ESG. It is curious to note that the same number of systems (23) encourage EQAR registration and ENQA membership.

◆◆◆ Figure 3.7: Legislation encouraging EQAR registration and ENQA membership for national agencies, 2013/14

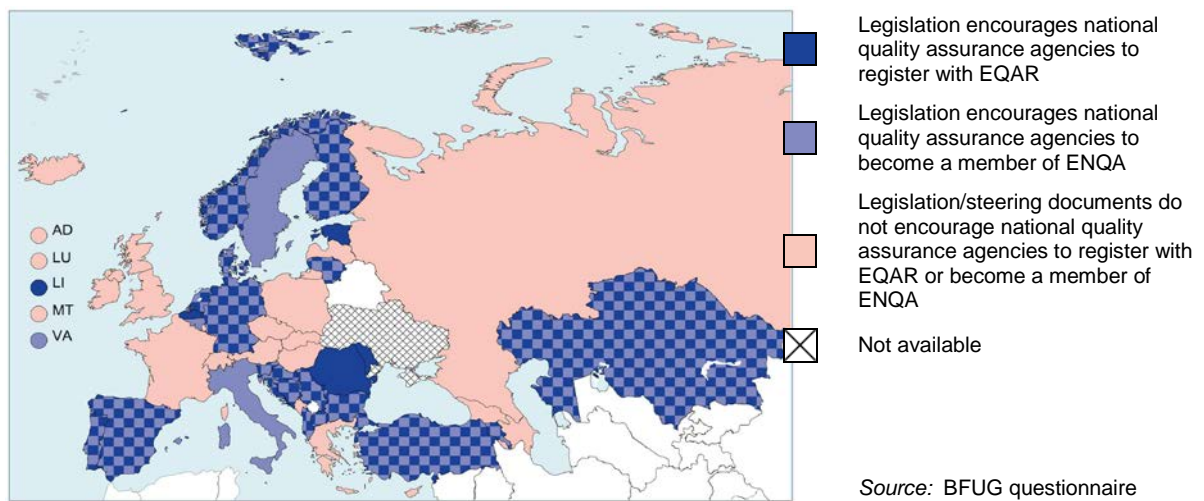
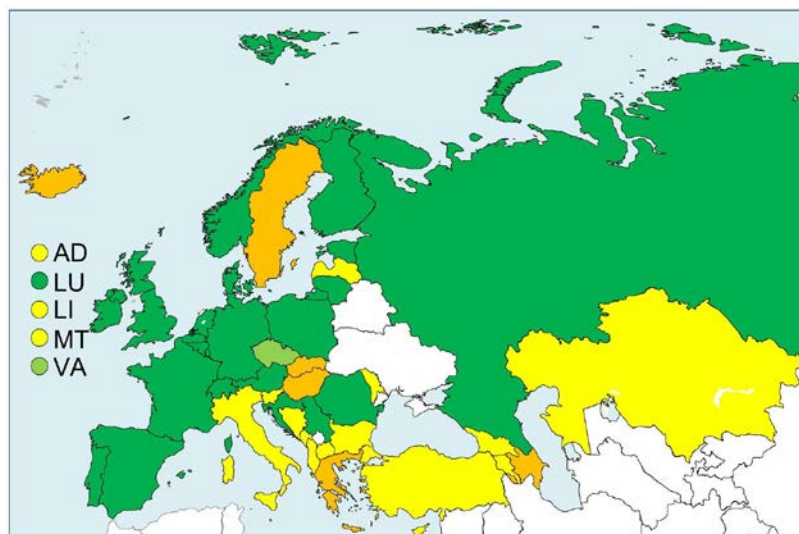


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Three indicators on quality assurance are included in the EHEA Scorecard. They focus on the stage of development of external quality assurance systems, the level of student participation in external quality assurance and the level of international participation in external quality assurance.

◆ ◆ ◆ Figure 3.8: Scorecard Indicator (4): 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.

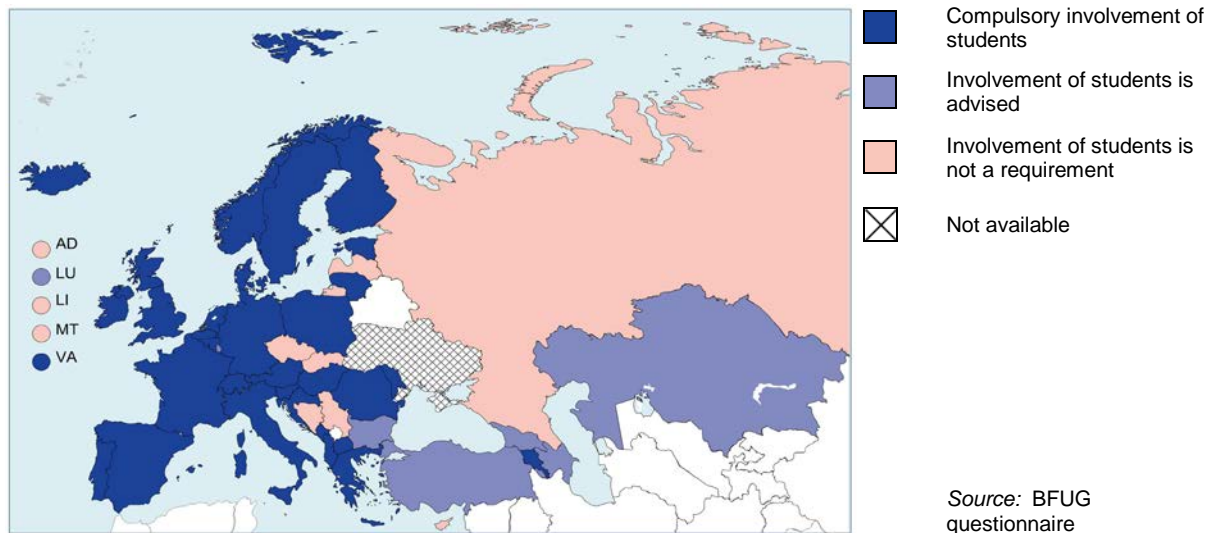
Scorecard indicator 4 focuses on the development of external quality assurance systems. It contains elements that assess how comprehensive the system is (applying to all institutions or only some) and examines a range of key issues covered by the quality assurance system (teaching, student support services, internal quality assurance/management system). It also considers whether agencies have been evaluated against the ESG.

At first glance, the indicator 4 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.

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 3.9: Involvement of students in Quality Assurance governance bodies, 2013/14



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

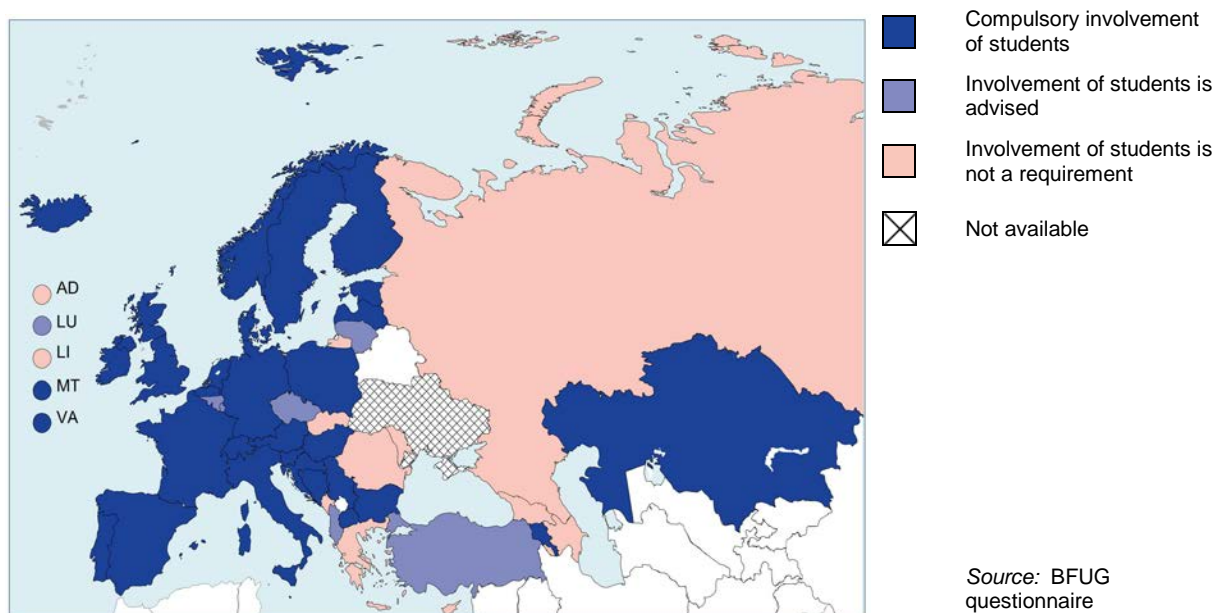
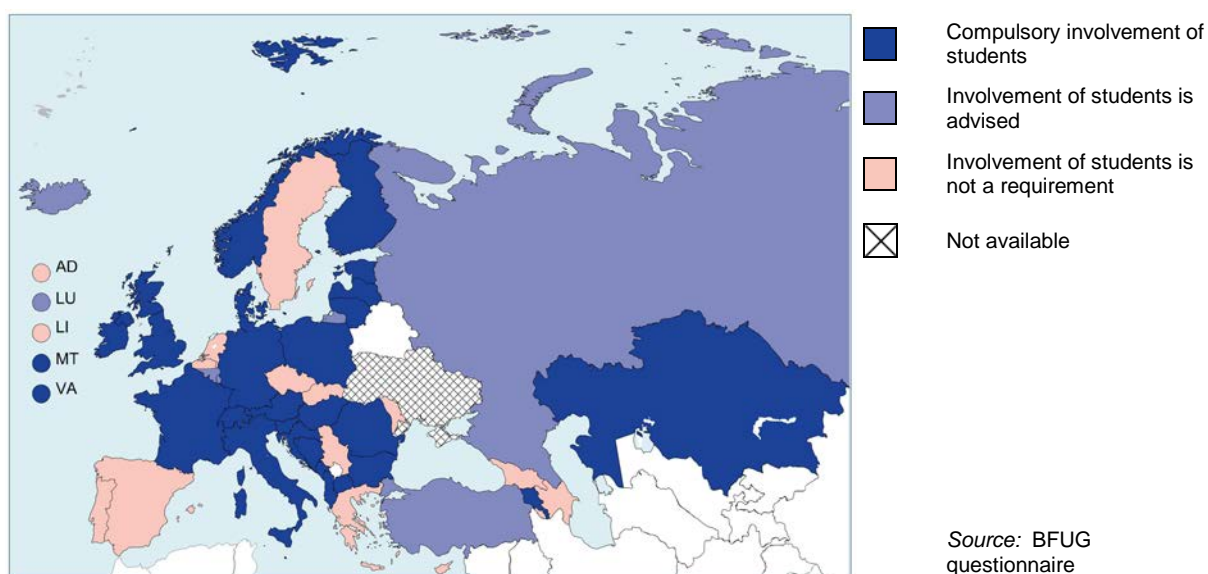


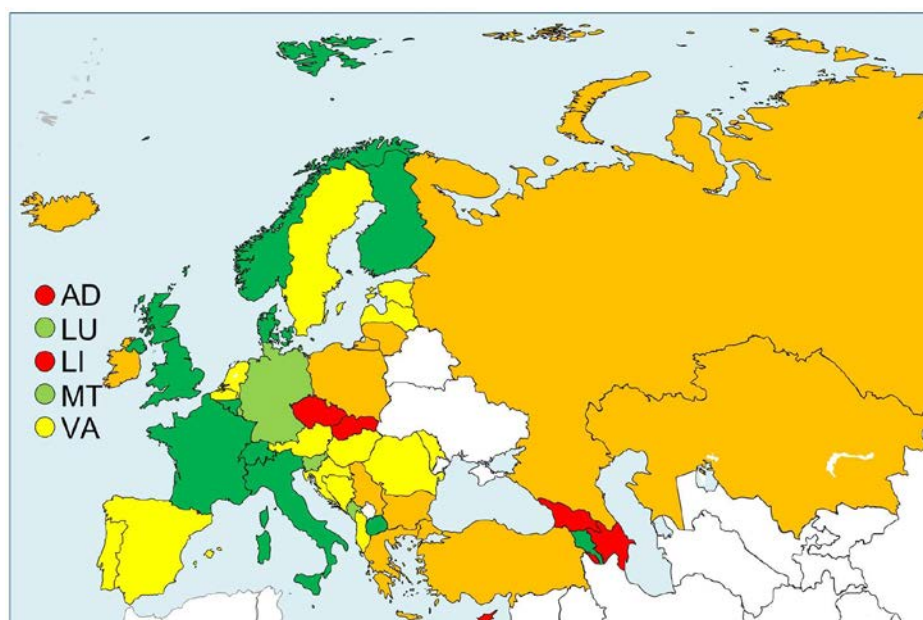
Figure 3.10 considers student participation in external review teams, again distinguishing between required involvement, optional (advised) involvement, and no requirement for students to be involved. It is interesting, if not surprising, to note the strong overlap with the information in Figure 3.9, 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.

This assumption, however, should not be taken for granted. Indeed, after looking at figure 3.11 on the involvement of students in decision-making processes. This map still shows a considerable number of systems (28) where student involvement is compulsory. However, the picture is more nuanced. In some countries, such as Belgium (French Community) even if the involvement of students is not a legal requirement, it may still be common practice. 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 3.11: Involvement of students in decision-making processes for external reviews, 2013/14



◆◆◆ Figure 3.12: Scorecard Indicator (5): Level of student participation in external quality assurance system 2013/14



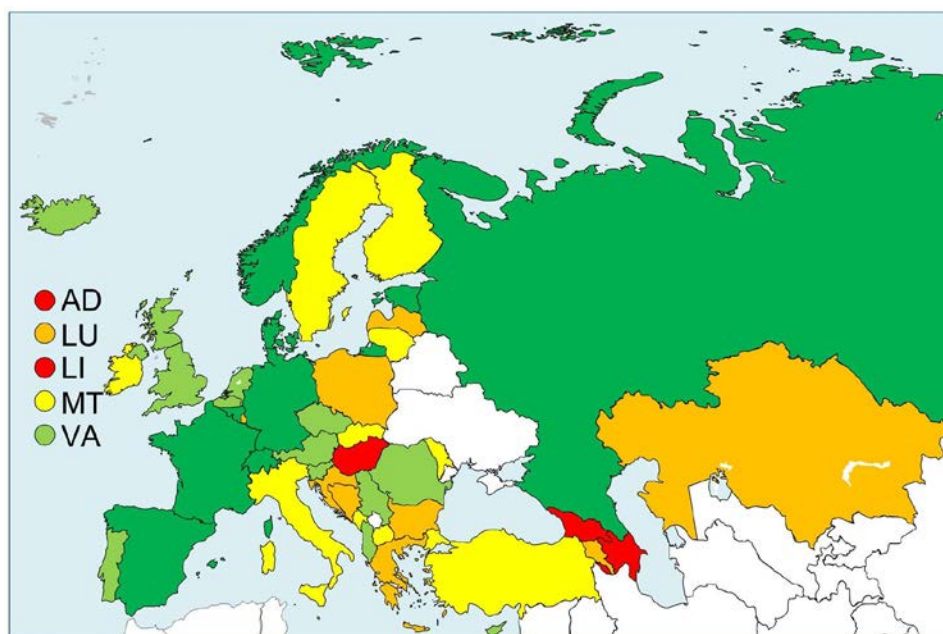
Scorecard categories

-  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 3.13: Scorecard Indicator (6): 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 6 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.

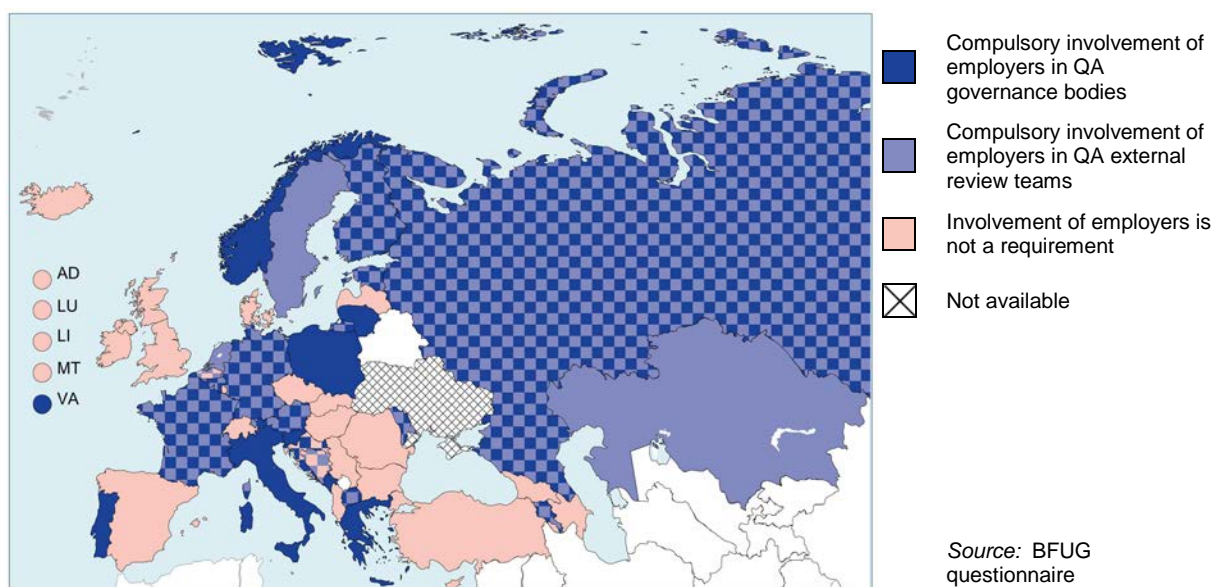
At that time, eight countries appeared in the highest (dark green) category. This has now moved up to nine countries, while progress in the light green category is more substantial: 14 countries now appear compared to 11 in 2012. 11 countries are now in the yellow category – an increase of one from 2012. 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.

3.2.5. 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 3.14: Required involvement of employers in QA governance bodies and external review teams, 2013/14



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 12 where this was already possible - have followed up with significant legislative reform enabling higher education institutions to work with foreign agencies.

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 ⁽⁷⁾.

By way of conclusion, the report raised the question whether countries gave sufficient priority to addressing under-representation 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).

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

⁽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..

⁽⁷⁾ The European Higher Education Area in 2012: Bologna Process Implementation Report, chapter 4.

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 higher 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 to 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 higher education.

4.1.1. Gender balance in higher education

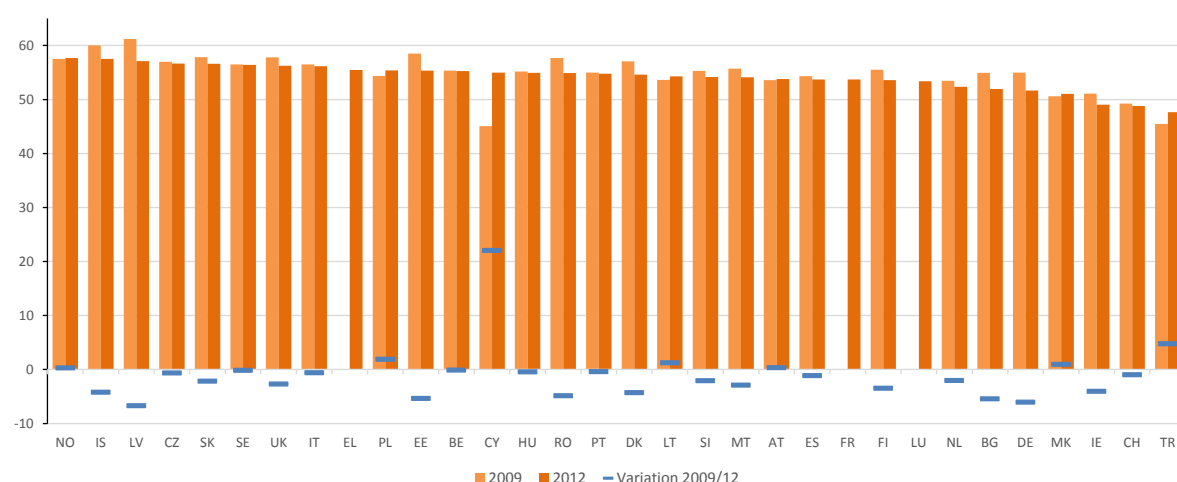
Equal opportunities for men and women to attain higher education are a main concern of the social dimension within the Bologna Process. This section on gender balance looks at the development of women's enrolment overall, by level of study and by field of study.

Figure 4.1 shows the share of women among new entrants in tertiary education in 2008/09 and three years later ⁽⁸⁾ In all countries, except for Cyprus, Turkey and Switzerland, the percentage of women entering tertiary education was above 50 % in 2008/09; Switzerland and "The former Yugoslav 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 on tertiary education level between 2008/09 and 2011/12. Only a few other countries saw a further increase in the share of women, and to a much lesser degree: Turkey +4.78 %, Poland

⁽⁸⁾ 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.' (UOE Manual 2013:22) 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.

+1.88 %, Lithuania +1.25 %. 14 countries saw a decrease in the share of women entering tertiary education, eight of them by 4-7 %, six of them by 2-3.5 %. 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 of women 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 females 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 % females 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
2008/9	57.5	60.0	61.2	57.0	57.9	56.5		57.8	56.5		:	54.4	58.5	55.3	45.1	55.2	57.7	55.0
2011/12	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 (%)	0.32	-4.21	-6.71	-0.62	-2.16	-0.13		-2.69	-0.59		:	1.88	-5.35	-0.10	22.04	-0.42	-4.85	-0.39
	DK	LT	SI	MT	AT	ES	FR	FI	RS	LU	NL	BG	DE	AZ	MK	IE	CH	TR
2008/9	57.1	53.6	55.3	55.7	53.6	54.3		55.5		:	53.5	54.9	55.0		50.6	51.1	49.2	45.5
2011/12	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
Variation (%)	-4.27	1.25	-2.08	-2.88	0.36	-1.11		-3.48		:	-2.02	-5.42	-6.04		0.95	-4.02	-0.95	4.78

Notes: [To be included]

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

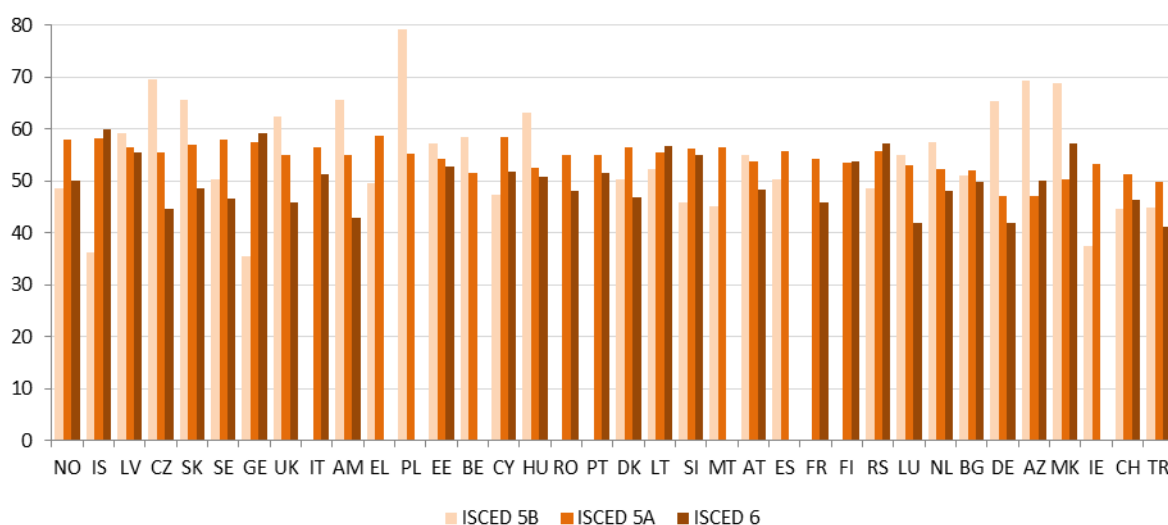
Next to this variation between countries, the share of women among new entrants in tertiary education also varies between levels of education. In the vast majority of countries (23 out of 30 for which data is available), the share of women entering higher education decreases when comparing ISCED 5A to 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; in 12 countries men are underrepresented, in 14 countries women.

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

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

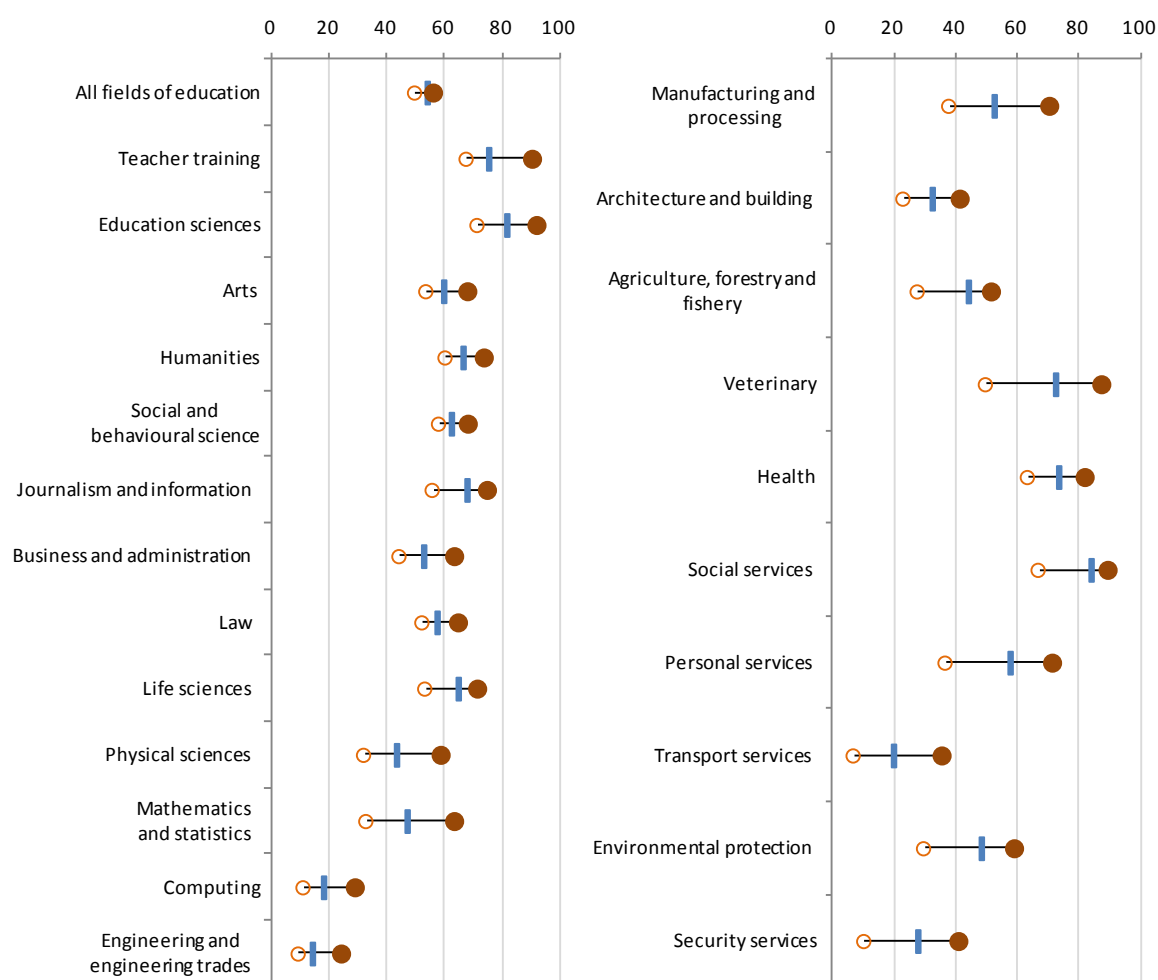
The differences between levels are partly related to differences between study fields – at which level they are commonly studied and whether they tend to attract more men or more women. Figure 4.3 shows very clearly that the share of women entering tertiary education varies quite strongly between different fields of study ⁽⁹⁾.

Figure 4.3 illustrates the concentration of women, and vice versa of men, in certain fields of study. The median refers to the median share of women in the fields of study across countries, i.e. the median indicates that in 50% of the countries, for which data is available, the respective share of new entrants in the particular field of study is female. If the first and ninth percentiles are close to the median, this pattern is similar across countries. This is especially the case in social and behavioural sciences, law,

⁽⁹⁾ It is important to note that country coverage varies across different fields (for details see the Glossary and methodological notes).

humanities and arts. In these fields, the variation across countries is less than 15 percentage points. On the other hand, the share of women among new entrants varies most across countries in the fields of veterinary, all kinds of services, manufacturing and processing but also in mathematics and physical sciences. The latter is remarkable, since the goal of increasing the share of women in science, technology, engineering, and mathematics fields is a common plea of gender and education policies. The countries with the highest shares of women among new entrants in mathematics and statistics are Cyprus, Denmark, Azerbaijan and the Baltic countries (Estonia, Latvia and Lithuania). Still, the median in the field of mathematics is 48 %, which means that in half of the countries the share of women entering tertiary education in the field of mathematics is significantly lower than the total share of women among new entrants (54 %). The same applies to physical science: in Azerbaijan, Cyprus, Poland, Slovakia and Romania, 55 % or more of the students commencing studies in physics or related subjects are female. However, the median for these fields is 10 percentage points below the overall share of women. 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, education sciences, teacher training and health, women are strongly overrepresented with the median of the proportion of women among new entrants being more than 70 %.

Figure 4.3 Percentage of women in new entrants in tertiary education by field (median and 10/90 percentile), 2011/12

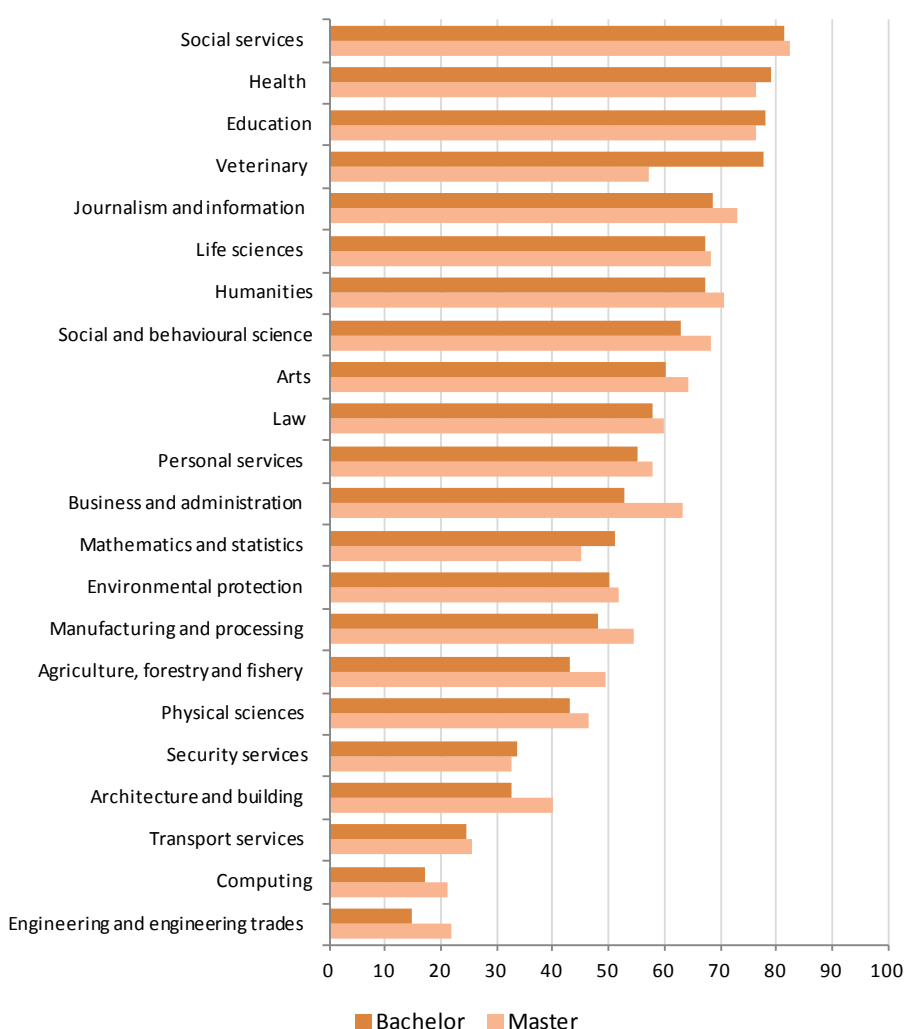


Source: Eurostat, UOE and additional collection for the other EHEA countries.

Figure 4.4 shows the median share of women enrolled in by field of education and level (Bachelor and Master programmes). The figures show that only in education, mathematics and statistics, veterinary, health and security services, the share of women declines from Bachelor to Master programmes. Notably, three out of five fields of study with a decline in the share of women when comparing Bachelor to Master programmes are subjects with a strong overrepresentation of women (cf. above). An increase of more than 10 % between Bachelor and Master programmes can be observed in the fields of manufacturing and processing, agriculture, forestry and fishery, business and administration, architecture and building, computing as well as in engineering and engineering trades. In all of these fields, the median of the share of female students at Bachelor level is below the average participation across fields of study (54.1 %).

National situations 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 reaches 33 % (Denmark) and 35 % (Iceland) at Master level. 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).

Figure 4.4 Percentage of women in enrolled students in Bologna structures by field of education and level of Bologna structure (BA and MA), 2011/12 ⁽¹⁰⁾



⁽¹⁰⁾ Country coverage varies between fields and also within fields (between BA and MA), so comparability is limited.

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. That type of information is, however, much more difficult to gather. Eurostat data presented in this section uses the country of birth as criterion, which has its limitations, as the group of foreign-born students also includes students who moved to the country just for the purposes of study (mobile students), while children of immigrants born in the country (often referred to as 'second generation immigrants') on the other hand are treated like native-born students. 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 4.5 shows the share of early leavers from education and training (ESL) 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.

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 ESL 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 4.5 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 7.1 and 7.5). 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 4.5 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.

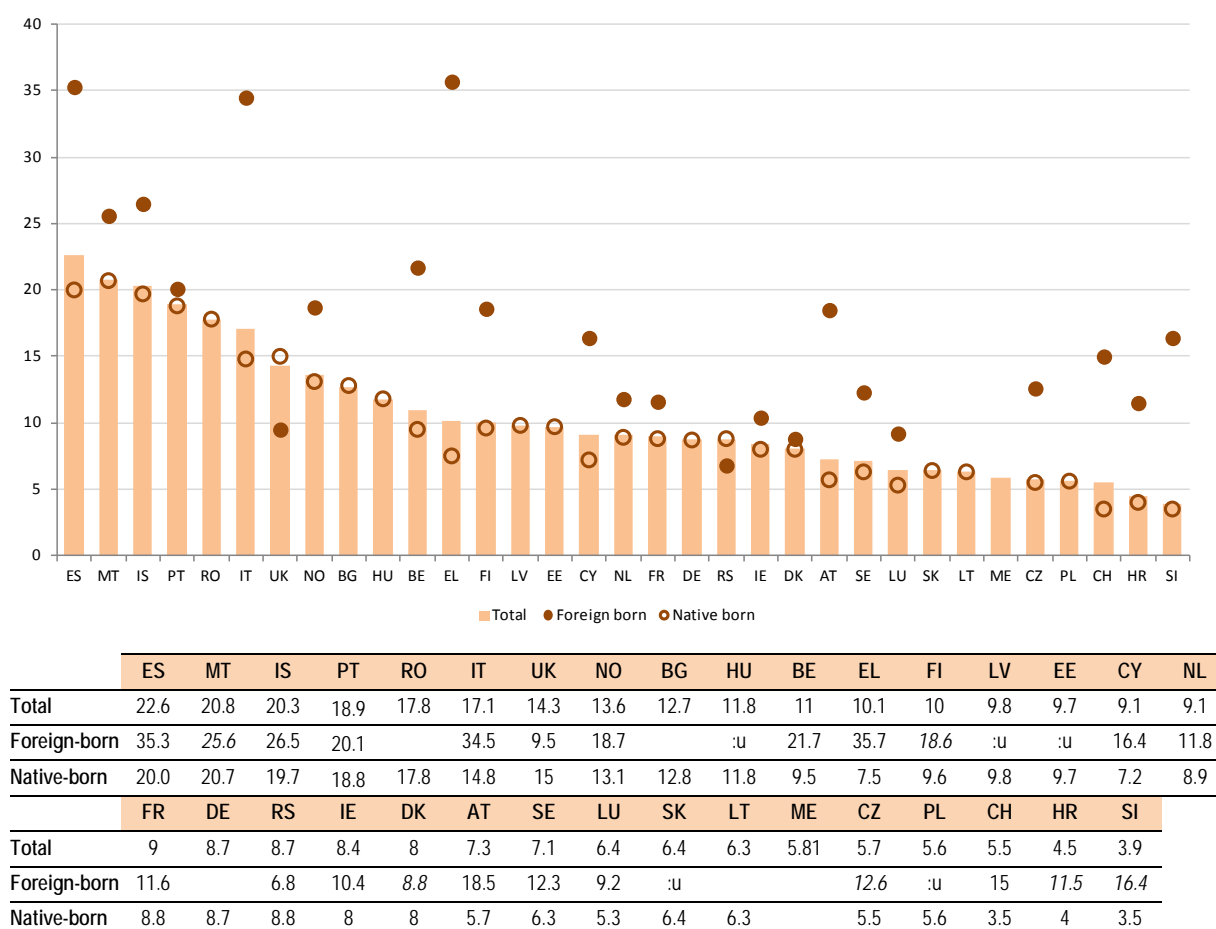
The highest shares of ESL among native-born young adults are observed in Spain, Malta and Iceland. In those three countries, one out of five young women and men (18-24 years old) left the education system without a qualification at upper secondary level. In Portugal, Romania, the United Kingdom, Italy, 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 ⁽¹¹⁾ and the United Kingdom, which might at least partly be related to the comparatively high number of international students in that country (see figures 7.1 and 7.5). In Greece, with a share of 35.7 %, foreign-born men and women aged 18-24 are almost five times as often ESL than native-born men

(11) 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.

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



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.

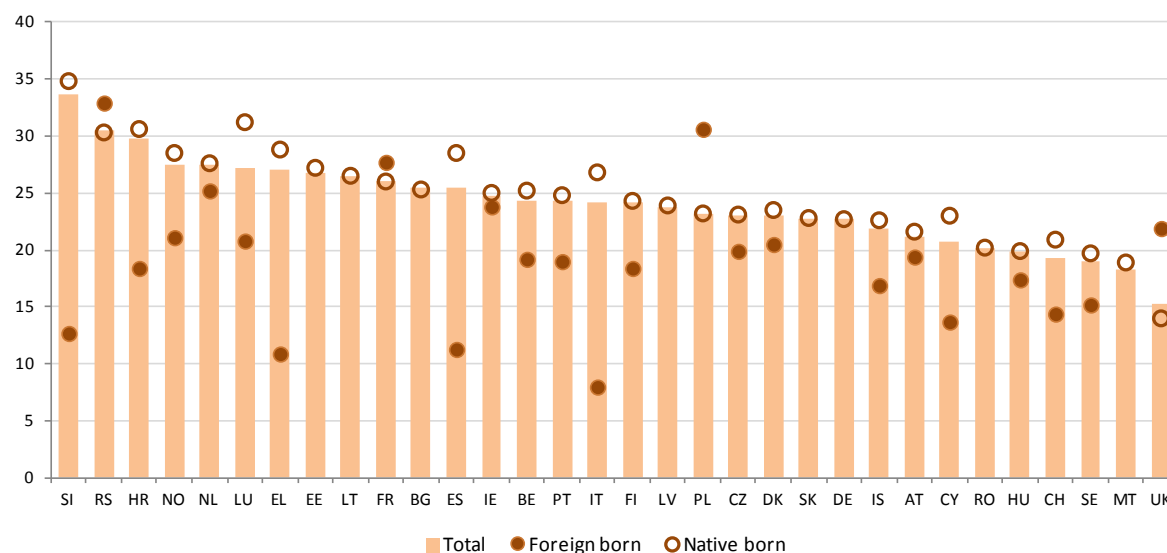
Figure 4.6 shows to what extent the discrepancies at lower education levels between those born abroad and those born within a country persist also at tertiary level. This indicator compares the participation rates in higher education of the foreign-born population aged 18 to 29 with the participation 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. Similar to figure 4.5, the indicator also loses significance on the integration of the foreign-born population of a given country the higher the share of international students is.

In almost all EHEA countries for which data is available, young adults born abroad have a lower participation rate in tertiary education than native-born young adults. There are however significant differences across the EHEA. 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). However, also with regard to the total population, participation rates vary

significantly across the EHEA – the share of all young adults (aged 18-29) participating in tertiary education ranges from 15.3 % in the United Kingdom to 33.6 % in Slovenia.

So when interested in potential disadvantages of young adults with immigration background it is more informative 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 for the purposes of data collection). 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, 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 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 %).

Figure 4.6: Participation rates in tertiary education among the population aged 18-29 born abroad, native and total population, 2013



	SI	RS	HR	NO	NL	LU	EL	EE	LT	FR	BG	ES	IE	BE	PT	IT
Total	33.6	30.5	29.8	27.5	27.4	27.2	27	26.8	26.5	26.1	25.4	25.4	24.7	24.3	24.3	24.1
Foreign-born	12.7	32.9	18.4	21.1	25.2	20.8	10.9	15.3	:u	27.7	:u	11.3	23.8	19.2	19	8
Native-born	34.8	30.3	30.6	28.5	27.6	31.2	28.8	27.2	26.5	26.0	25.3	28.5	25	25.2	24.8	26.8
	FI	LV	PL	CZ	DK	SK	DE	IS	AT	CY	RO	HU	CH	SE	MT	UK
Total	24.1	23.7	23.2	23	23	22.8	22.7	21.9	21.2	20.7	20.2	19.8	19.3	19	18.3	15.3
Foreign-born	18.4	:u	30.6	19.9	20.5	:u	:	16.9	19.4	13.7	:u	17.4	14.4	15.2	:u	21.9
Native-born	24.3	23.9	23.2	23.1	23.5	22.8	22.7	22.6	21.6	23	20.2	19.9	20.9	19.7	18.9	14

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

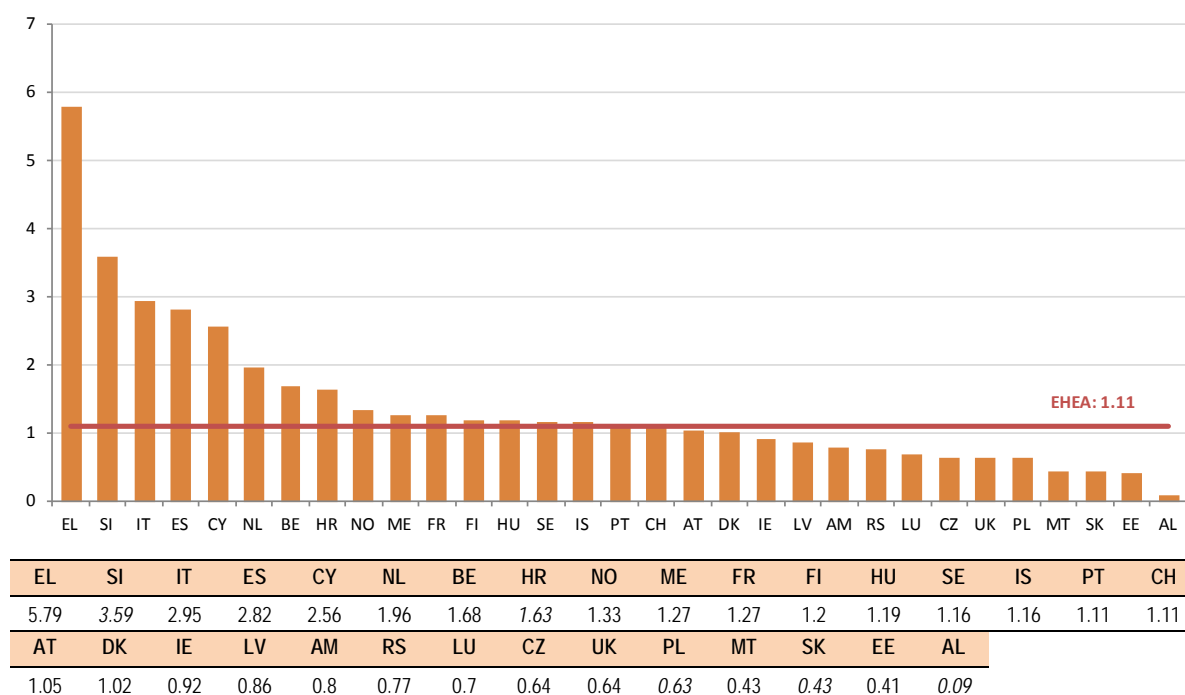
Data are sorted by participation rate in tertiary education of the total population.

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

The last figure of this section (figure 4.7 below) shows the overall chances of those born within a country over those born abroad to attain higher education, depicted as odds ratios. This means that the numbers in figure 4.7 can be read as chances of native-born over foreign-born young adults to attain higher education. In Greece, this ratio is significantly to the disadvantage of foreign-born young adults who are almost six times less likely to complete higher education than their native-born

counterparts. In Italy, Spain and Cyprus this ratio is almost one to three, in the Netherlands and Belgium almost one to two. On the other hand, there are also countries (roughly one third of the countries for which reliable data is available) in which adults born abroad have higher chances to attain higher 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 4.7 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.

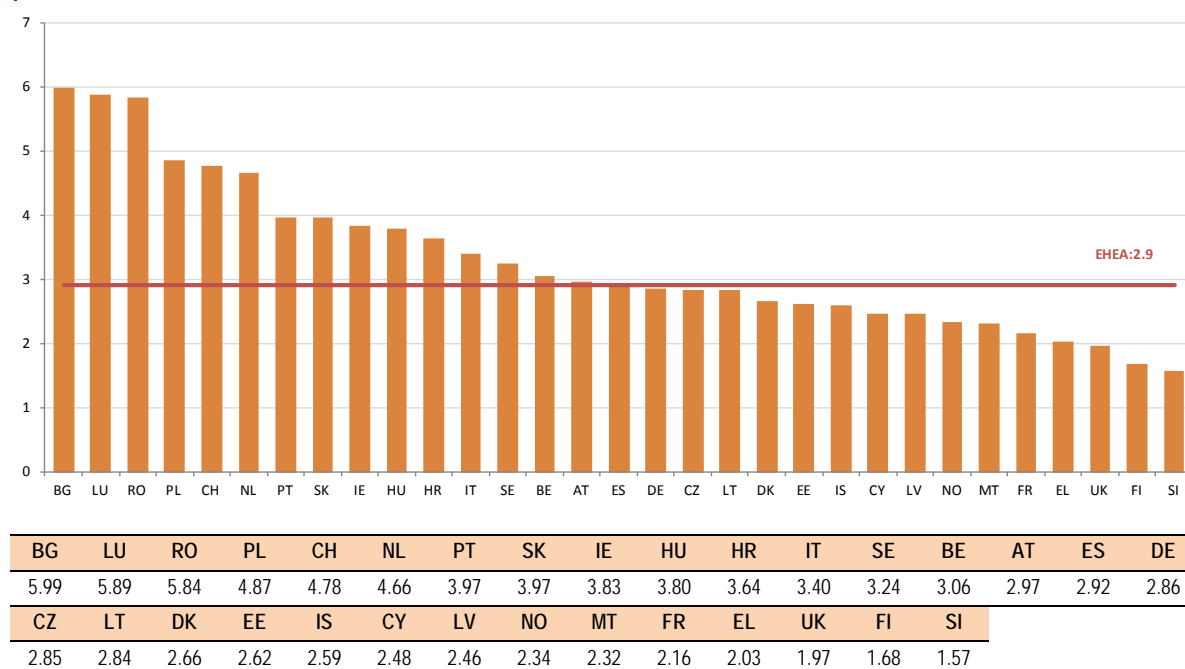
4.1.3. Influence of parental education on tertiary education attainment

A core concern of the social dimension when it was introduced to the Bologna Process was to enable young adults to enter, participate and complete higher education without obstacles related to their social or economic background, as ministerial communiqués repeatedly stressed. 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 4.8 therefore shows the odds ratios of young adults (25-34 years old) with highly educated parents over those with medium educated parents to attain higher 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; '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 is 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 to attain tertiary education of young adults whose parents have only upper secondary or post-secondary non-tertiary education are two to five times lower than those of young adults 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 tertiary educated parents have nearly six times more chances to attain tertiary education themselves than children of medium educated parents.

Figure 4.8: Attainment by educational background: odds ratio of young adults with highly educated parents (i.e. tertiary educational attainment) over young adults with medium educated parents (i.e. upper secondary or post-secondary non-tertiary education) to complete tertiary education, 2011



Notes:

Source: Eurostat, EU-SILC.

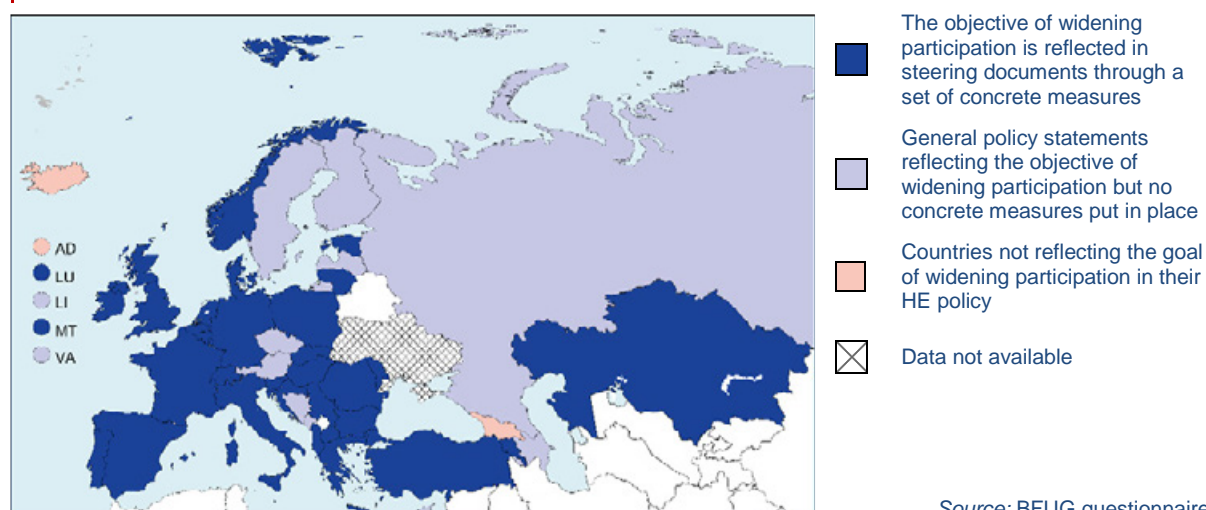
4.2. Policy approaches to widening access and participation in higher education

Drawing upon the responses to the BFUG questionnaire and the latest Eurostudent report, this section outlines the different policy approaches to widening participation in higher education across the EHEA. 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. Overview of the main approaches

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 12 systems the objective of widening participation is reflected in steering documents through general policy statements without concrete measures being put in place. In almost 70 % of the systems (33) it is reflected through a set of concrete measures (see figure 4.9).

Figure 4.9: National policy approaches to widening participation in higher education, 2013/14



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 organize 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) ⁽¹²⁾ are scholarships for underrepresented groups of students (with disabilities, 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) ⁽¹³⁾ are special examination/study conditions or other support measures for students with disabilities. Seven systems (Albania, "The former Yugoslav

⁽¹²⁾ Armenia, Belgium (Flemish Community), Bulgaria, Croatia, Estonia, France, Germany, Lithuania, Luxembourg, Malta?, Moldova, the Netherlands, Poland, Portugal?, Romania, Slovakia?, Spain, Switzerland, Turkey.

⁽¹³⁾ Croatia, Denmark, Estonia, Germany, Kazakhstan, Lithuania, Malta, the Netherlands, Norway, Poland, Serbia, Slovakia, Spain, Switzerland, Turkey.

Republic of Macedonia", Moldova, Norway, 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 under-represented 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 under-represented 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.

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' ⁽¹⁴⁾.

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 ⁽¹⁵⁾ defined national targets for tertiary education in their Europe 2020 National Reform Programmes ⁽¹⁶⁾. As the BFUG reporting showed, also two non-EU/candidate countries (Montenegro and Serbia) have adopted 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).

⁽¹⁴⁾ 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.

⁽¹⁵⁾ 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.

⁽¹⁶⁾ Overview of Europe 2020 targets. The national targets as set out in the National Reform Programmes (NRP) in April 2014. Available at http://ec.europa.eu/europe2020/pdf/targets_en.pdf [Accessed: 23 October 2014].

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.

4.2.2. Monitoring of the composition of the student body

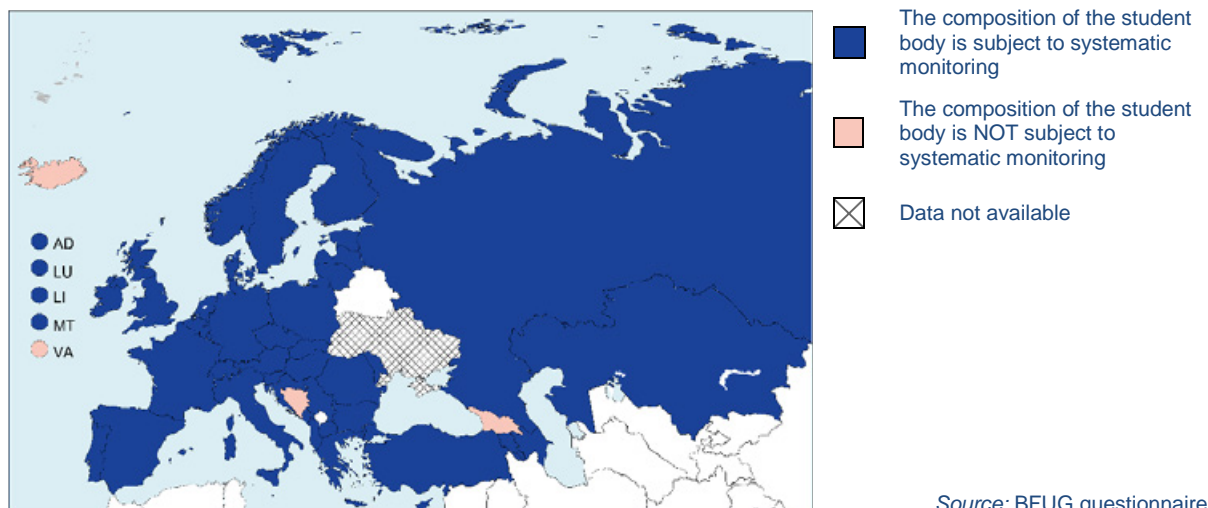
To be able to assess whether measures to widen access and participation in higher education have the desired effect, the composition of the student body needs to be systematically monitored over time.

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 (see figure 4.10). 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.

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, except by Switzerland during higher education studies (see table below).

Figure 4.10: Monitoring the composition of the student body, 2013/14



Characteristics monitored

Disability	Δ		Δ		Δ		Δ		Δ	Δ	Δ		Δ			Δ		Δ		Δ		Δ		
Labour market status prior to entry					Δ					Δ				○			Δ		Δ			Δ		
Age		Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ		Δ	Δ		
Type and level of qualification prior to entry		Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ		Δ	Δ		
Socio-economic background			Δ	Δ	Δ	Δ	Δ			Δ	Δ			Δ		Δ	Δ		Δ			Δ		
Gender		Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ		Δ	Δ	Δ	Δ	Δ		Δ	Δ		Δ	Δ		
Ethnic, cultural, religious or linguistic minority status	Δ		Δ				Δ			Δ				Δ	Δ		Δ							
Religion																								
Migrant status		Δ	Δ		Δ								Δ					Δ						
Other			Δ	Δ		Δ	Δ				Δ	Δ		Δ				Δ	Δ					
	AL	AD	AM	AT	AZ	BE fr	BE nl	BA	BG	HR	CY	CZ	DK	EE	FI	FR	MK	GE	DE	EL	VA	HU	IS	IE

Monitored at entry / during HE: Δ Monitored at / after graduation: ○

Disability	Δ	Δ				Δ	Δ	Δ	Δ	Δ		Δ		Δ	Δ	Δ	Δ			Δ	Δ	Δ	Δ
Labour market status prior to entry						○	Δ	Δ		Δ						Δ				Δ			
Age	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ
Type and level of qualification prior to entry	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ		Δ	Δ
Socio-economic background	Δ	Δ				Δ	Δ	Δ			Δ	Δ			Δ			Δ	Δ	Δ	Δ	Δ	Δ
Gender	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ	Δ
Ethnic, cultural, religious or		Δ						Δ		Δ				Δ			Δ					Δ	Δ

under-represented 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.

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

4.3.1. Access routes to higher education

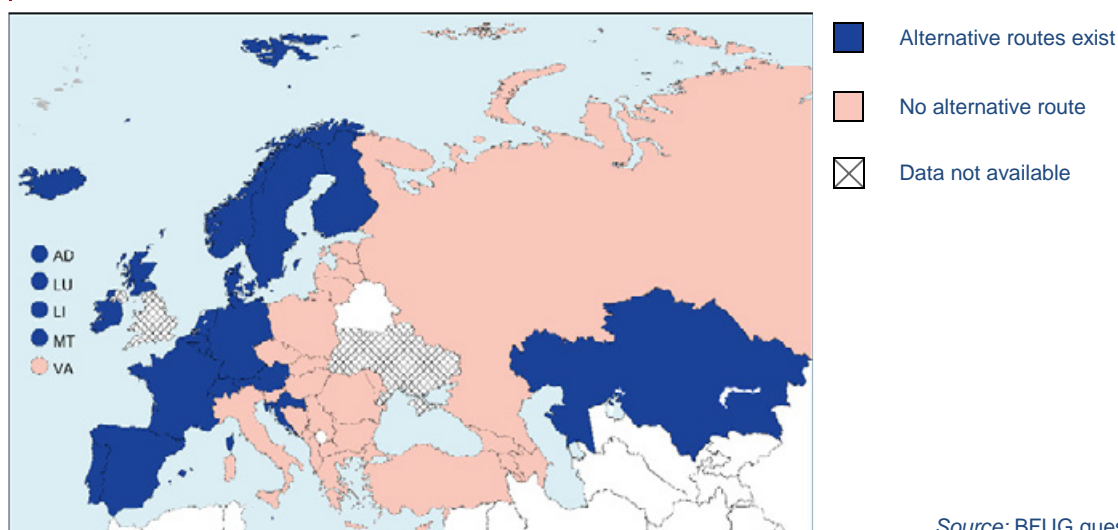
The traditional direct access route to higher education is the possession of an upper secondary qualification, general (ISCED 34) or vocational (ISCED 35). In the vast majority of the systems covered by this report, meeting those standard entry requirements does not guarantee access to higher education, 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 ⁽¹⁷⁾, 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 fields 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).

⁽¹⁷⁾ Armenia?, Austria, Belgium (Flemish Community), Belgium (French Community), France, Germany, Hungary, Italy, Lithuania, Luxembourg, Malta?, the Netherlands, Slovenia, Switzerland.

Figure 4.11: Alternative routes to higher education for non-traditional candidates, 2013/2014



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. [Question to Croatia: do they still need to have completed secondary education?] 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, Hungary, 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’ ⁽¹⁸⁾.

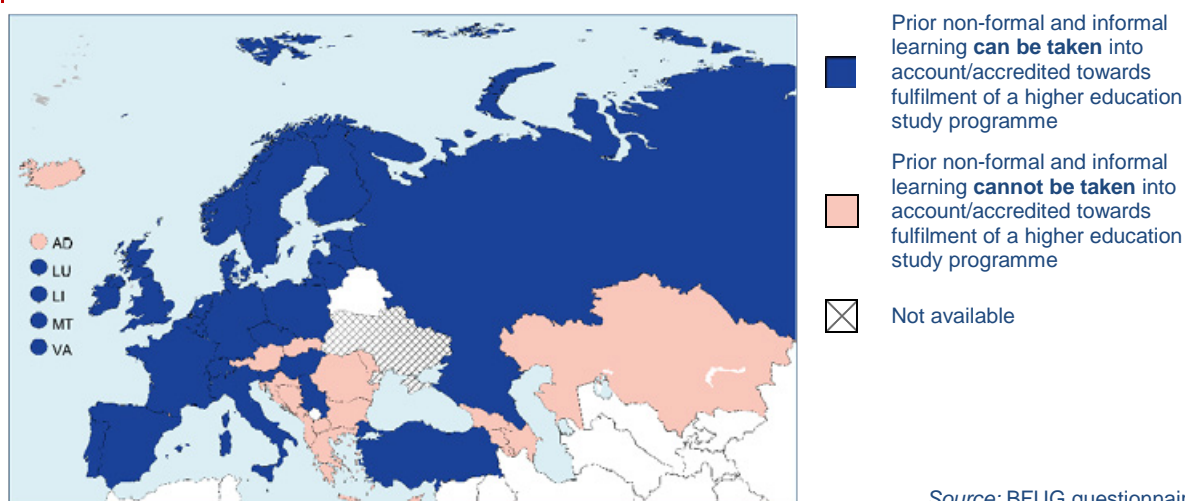
Nevertheless, in more than half of the systems (28), it is still not possible for candidates to be admitted to higher education on the basis of the recognition of prior non-formal and informal learning. In those countries, all higher education candidates must hold a higher education entry qualification (or pass an entry exam). Some of those countries (the Czech Republic, 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. university 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.

⁽¹⁸⁾ 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



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.

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 number / shares 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; 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 special 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 2001), 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.

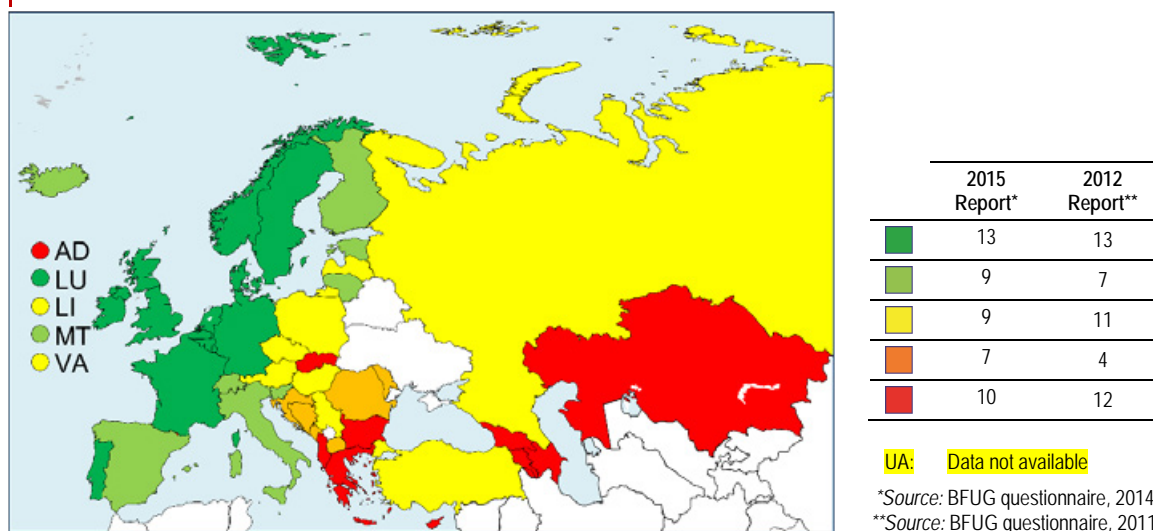
In 19 systems, mainly in the South-East, prior non-formal and informal learning cannot be taken into account / accredited towards fulfilment of a higher education study programme. In two of the 19 countries (Austria and Iceland), some higher education institutions or programmes are open to *admission* 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 n°?**: 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. 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 three systems. In Belgium (Flemish Community), 137 students made use of this opportunity (academic year 2013/14); in **Estonia 6.178 [during which period?]** and in France 4 016 (2012). Belgium (French Community) estimated the number of students who were exempted from higher education programme requirements based on the recognition of prior non-formal and informal learning to have risen from 185 in 2008 to 662 in 2012; 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 ⁽¹⁹⁾. 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’ ⁽²⁰⁾.

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 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.

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

⁽²⁰⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, pp. 1-2.

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

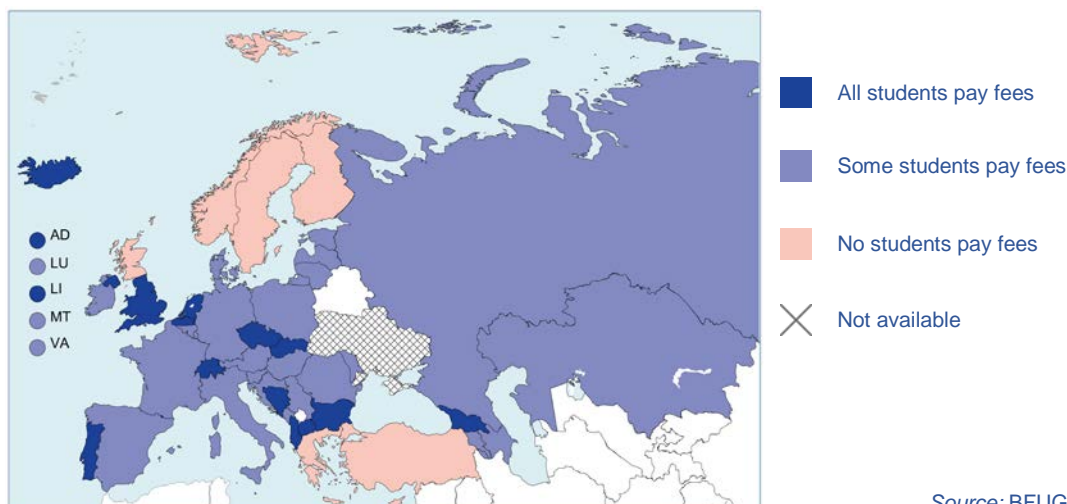
The (perceived) costs of higher education are likely to influence the decision of prospective students and their families whether to start studying at higher education level or not. The existence of fees is one criterion to consider; however, this information needs to be complemented by the proportion 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 as 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 here 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 home students and/or students who are considered under the same fee regime as home students.

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



Source: BFUG questionnaire

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 15 education systems, all students have to pay fees, though in some cases such fees are only small administrative charges (e.g. in the Czech Republic).

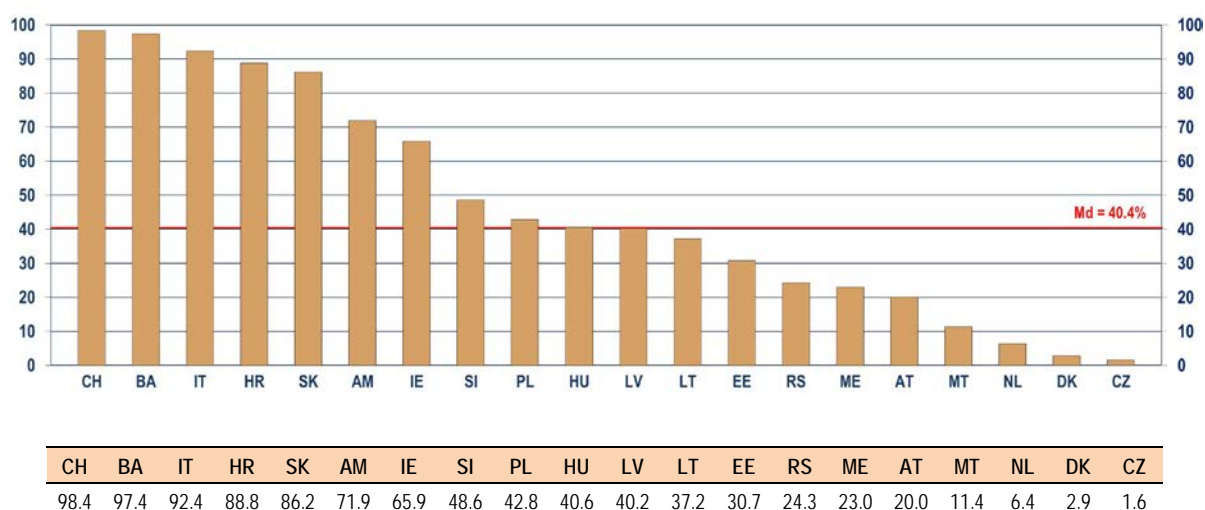
No fees are charged to first cycle students in seven systems: in three Nordic countries (Finland, Norway and Sweden), Cyprus, Greece, Turkey and the United Kingdom (Scotland). In Germany, while registration fees exist, all *Länder* have just recently abolished all tuition fees in higher education.

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 the Netherlands and Denmark ⁽²¹⁾.

⁽²¹⁾ 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 (registration) fees can be so low that not all students perceive them as fees (e.g. in the Czech Republic).

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.

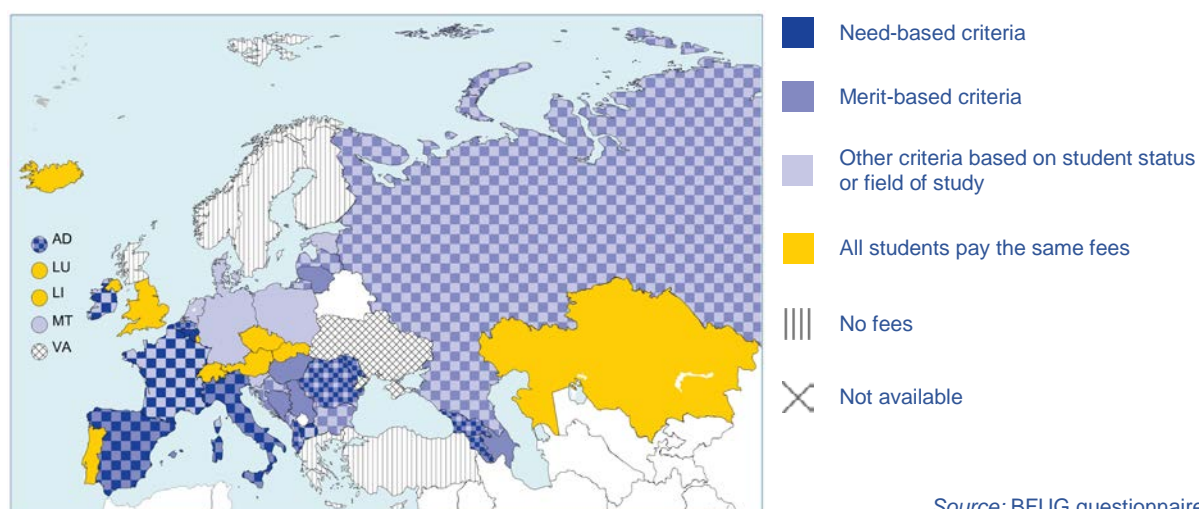
Czech Republic: the amount of registration fees is so low that not all students perceive them as fees.

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 used to decide the amounts that are paid? Figure 4.16 depicts the main criteria used 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.

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.

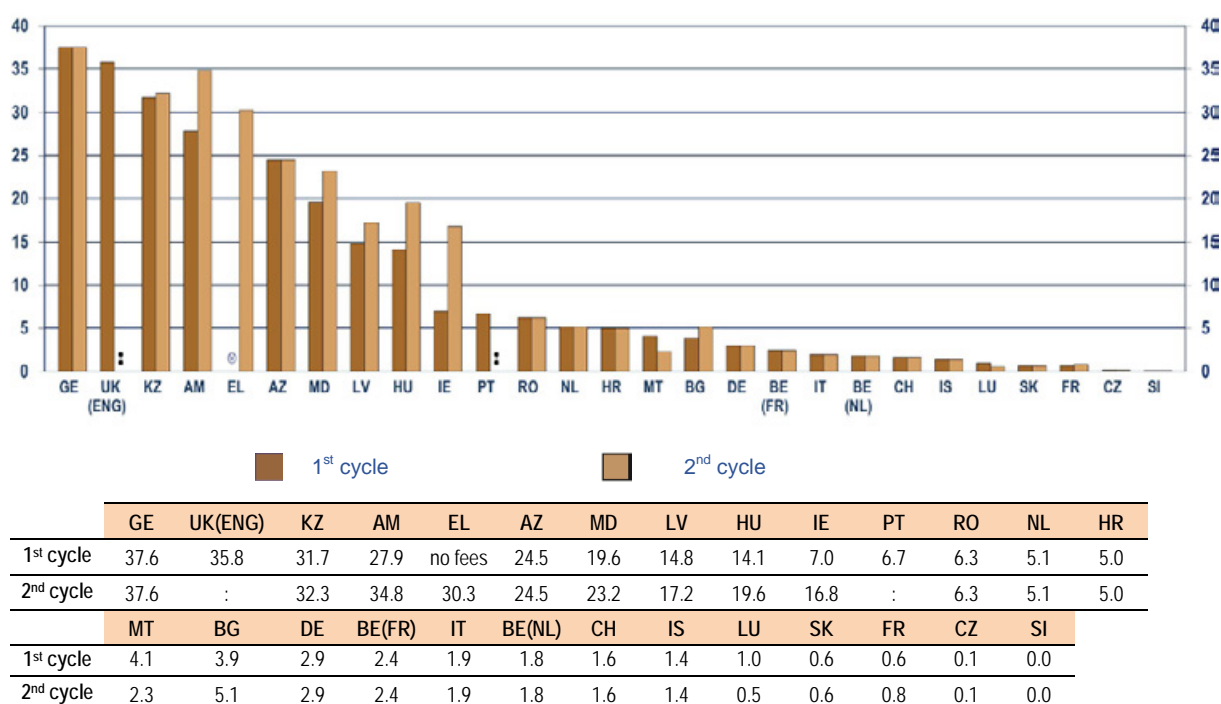
Criteria based on field of study are applied in Andorra, Armenia, Belgium (French Community), France, "The former Yugoslav Republic of Macedonia", Georgia, Latvia, Malta, Moldova and Montenegro. In France, for example, second cycle students in the fields of engineering and health pay higher fees.

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



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

Question to BA, FYROM, ME and RS: could you please send the data in national currency?

Question to EE and ES: could you please present the yearly amounts?

Question to AL: what do the two numbers signify?

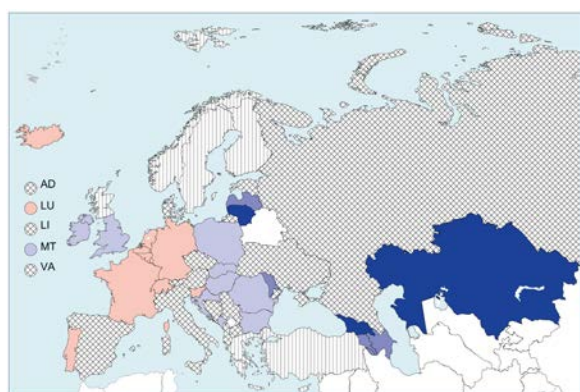
Source: BFUG questionnaire and World Bank

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.

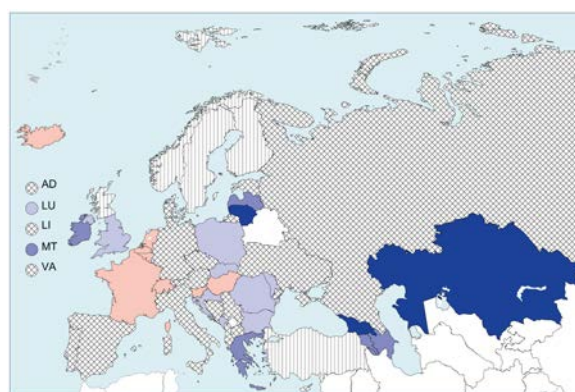
The maximum amount of fees students can potentially pay are categorised in Figure 4.18. As the figure depicts, some students can pay more than 100 % of the GDP per capita in Georgia, Kazakhstan and Lithuania in both cycles. The maximum amounts of fees are higher for second cycle students in Armenia, Azerbaijan, Bulgaria, Greece, Ireland, Kazakhstan, Latvia, Luxembourg, Malta and Montenegro; while first cycle students can potentially be charged more in Hungary, Lithuania and Moldova.

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

A. First cycle



B. Second cycle

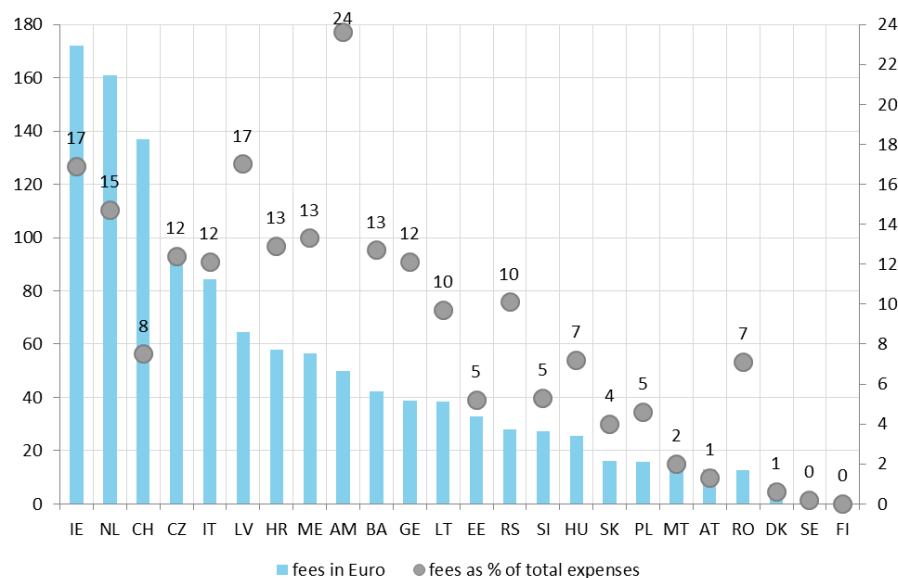


Source: BFUG questionnaire and World Bank

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 ⁽²²⁾ 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.

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



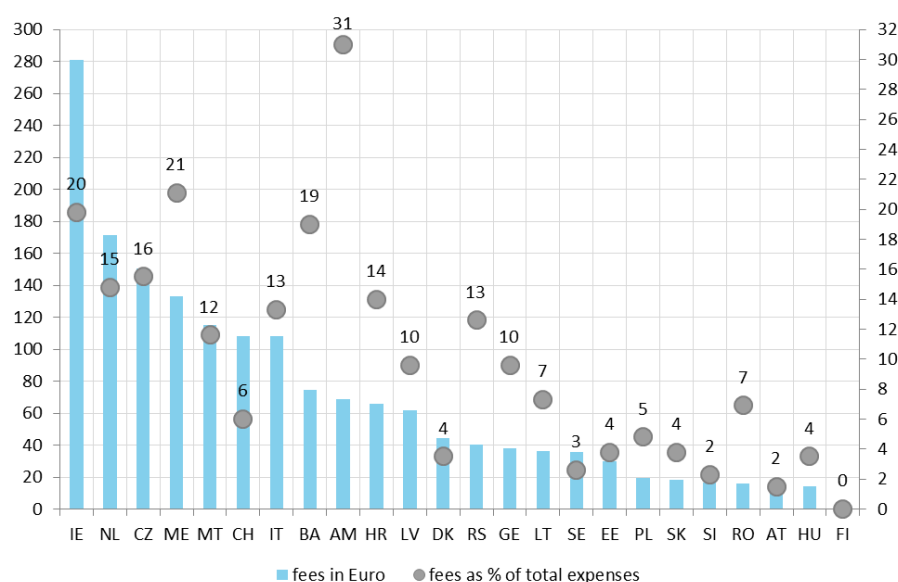
Notes: EUROSTUDENT Question(s): 3.7. What are your average expenses for the following items during the current semester?

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.

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?

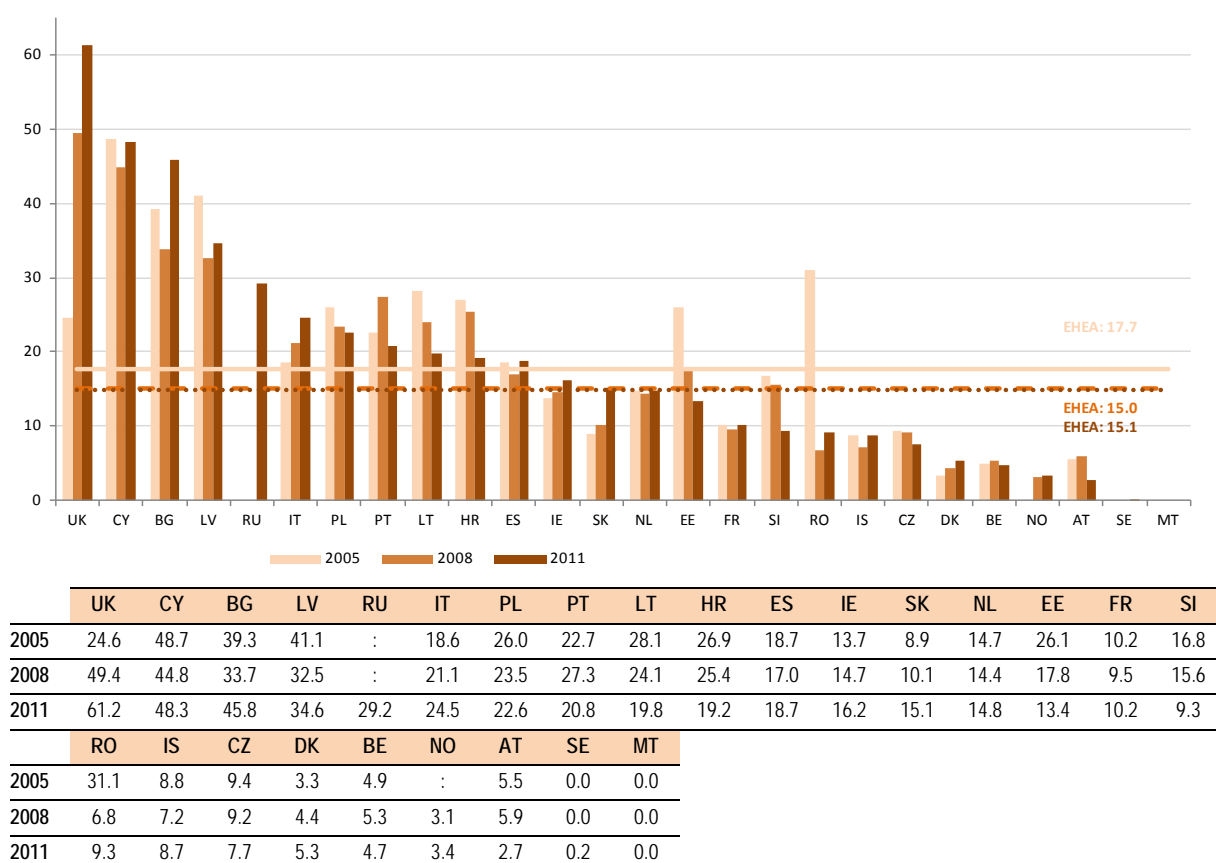
No data is available for Germany, France, Russia and Ukraine.

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, the share of household funding is also related to overall participation rates in higher education: the higher the number of students, the larger 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. However, tuition fees were relatively constant in this period, so these changes are indicative of a relative decrease in public funding for higher education.

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).

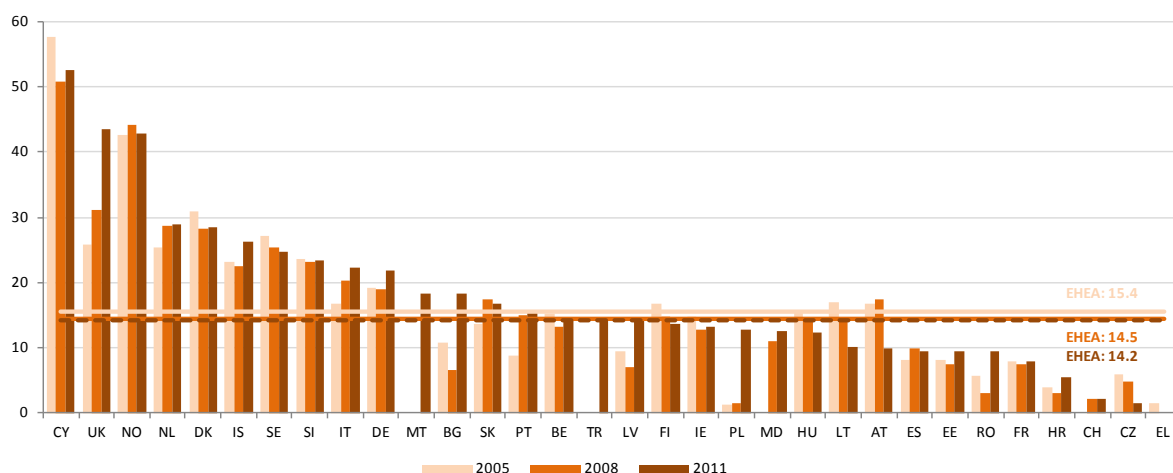
Countries with the largest decrease in the share of household expenditure between 2008 and 2011 were Austria, which saw a decrease by more than 50 %, Slovenia (by 40 %), Estonia (by 25 %) and Croatia (by 24 %). In Austria, the change may be linked to the abolition of tuition fees in 2008. In Slovenia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



	CY	UK	NO	NL	DK	IS	SE	SI	IT	DE	MT	BG	SK	PT	BE	TR	LV
2005	57.6	25.8	42.6	25.4	30.8	23.1	27.1	23.7	16.8	19.1	0.0	10.8	13.7	8.9	15.2	:	9.4
2008	50.9	31.2	44.1	28.7	28.4	22.5	25.4	23.2	20.2	18.9	:	6.7	17.5	14.9	13.2	:	7.1
2011	52.6	43.6	42.8	28.8	28.4	26.2	24.7	23.4	22.2	21.9	18.4	18.3	16.7	15.4	14.4	14.1	14.0
	FI	IE	PL	MD	HU	LT	AT	ES	EE	RO	FR	HR	CH	CZ	EL		
2005	16.6	14.8	1.1	:	15.7	17.0	16.8	8.2	8.2	5.6	7.9	3.9	0.0	5.9	1.4		
2008	14.7	12.7	1.5	11.0	14.3	14.1	17.4	9.9	7.4	3.0	7.4	3.1	2.2	4.9	:		
2011	13.7	13.3	12.7	12.5	12.4	10.1	9.8	9.4	9.3	9.3	8.0	5.5	2.2	1.5	:		

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.

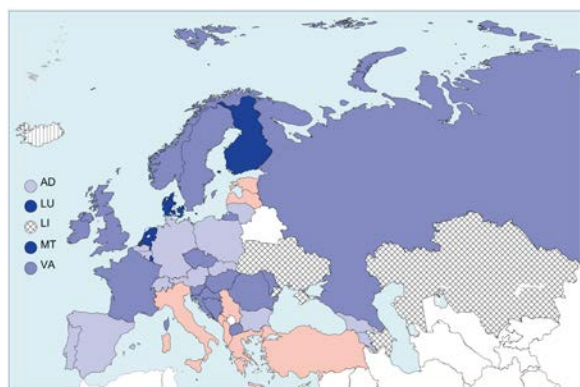
Forms and coverage of student support

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.

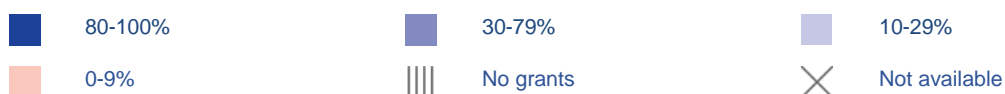
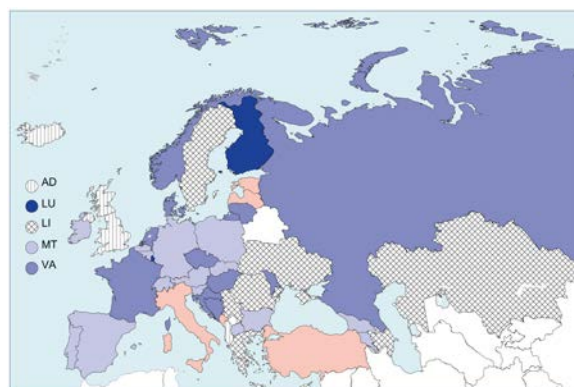
Students – or at least some students - receive grants/scholarships in all EHEA countries except Iceland. Grants and scholarships are only available for first cycle students in Albania, Andorra and the United Kingdom. Figure 4.23 depicts the proportion of students receiving grants.

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

A. First cycle



B. Second cycle



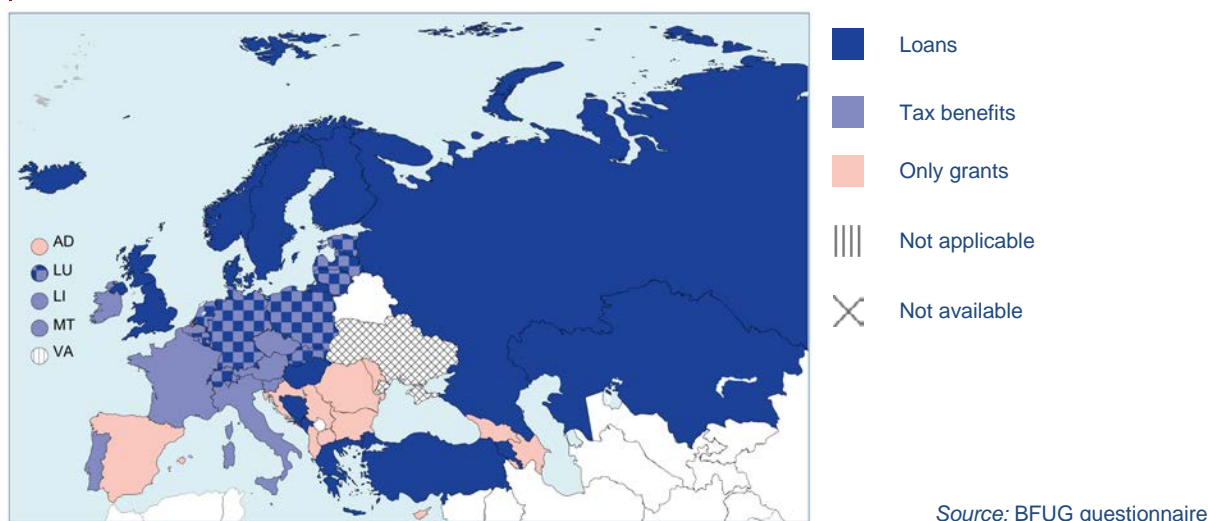
Source: BFUG questionnaire

Among the countries where data is 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.

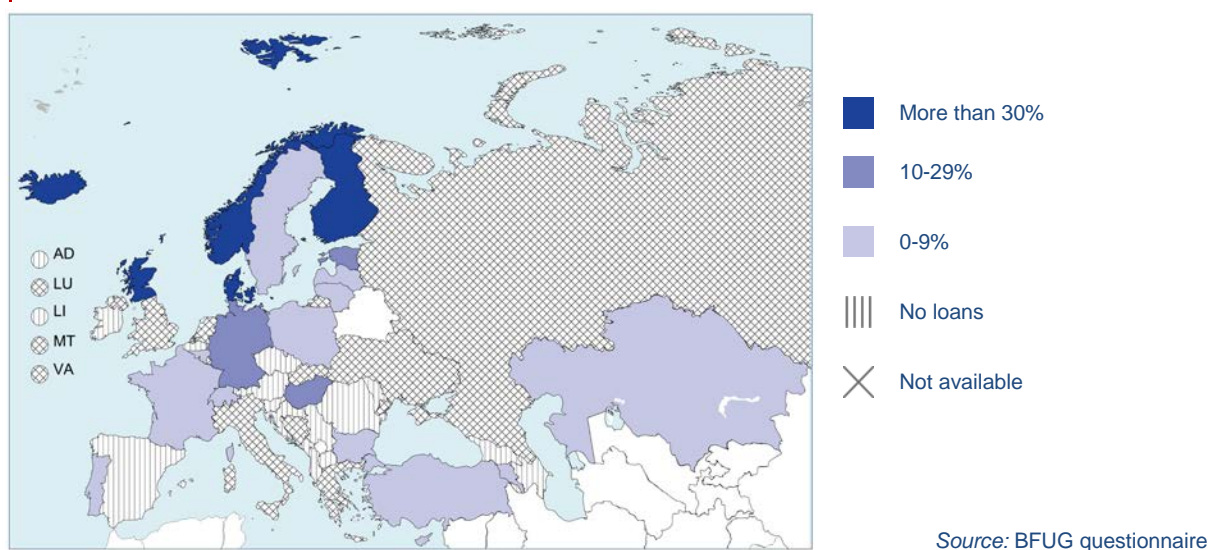
As Figure 4.24 shows, in 12 education systems, only grants are available for students. Loans exist in 24 education systems in the EHEA, most often in combination with grants (except in Iceland). Students' parents receive tax benefits in 20 education systems. All three forms of student support are available in Estonia, Germany, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Slovakia and Switzerland.

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



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).

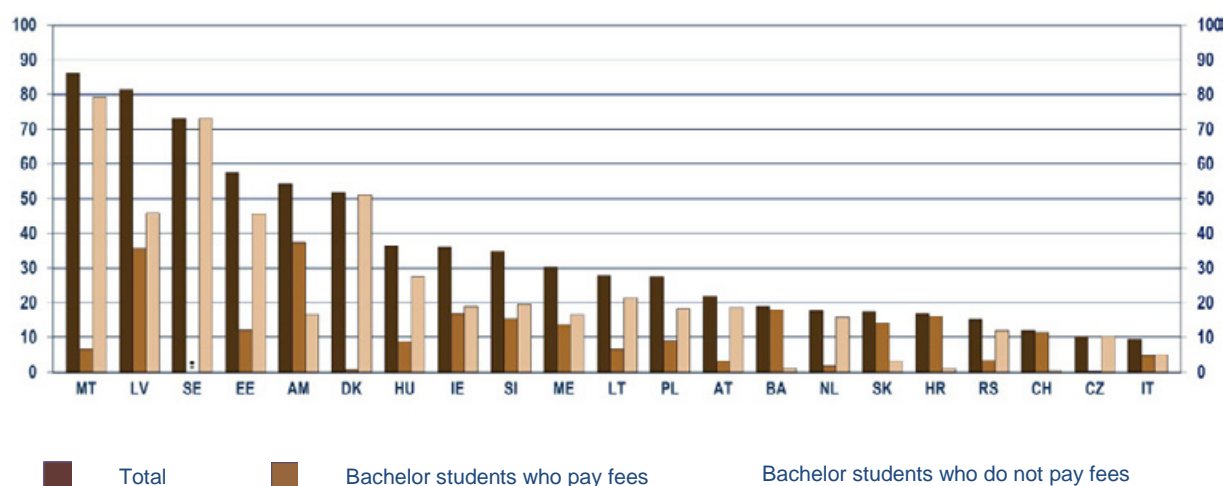
Figure 4.25: Proportion of students taking out loans (both cycles combined), 2013/14



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).

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?

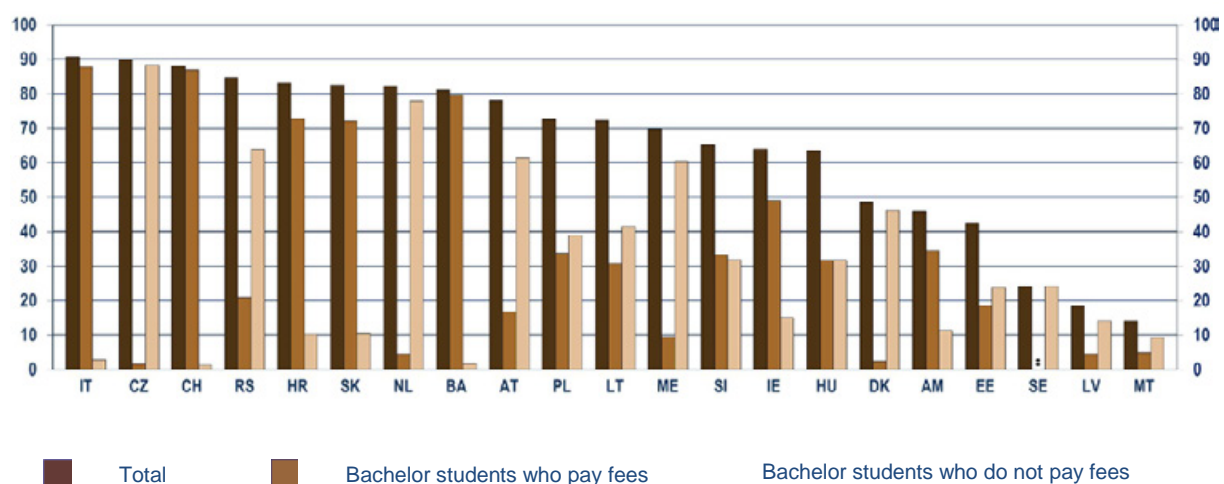
No data is available for Germany, Finland, France, Georgia, Romania, Russia and Ukraine. Too few cases for BA students who pay fees: Sweden.

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.

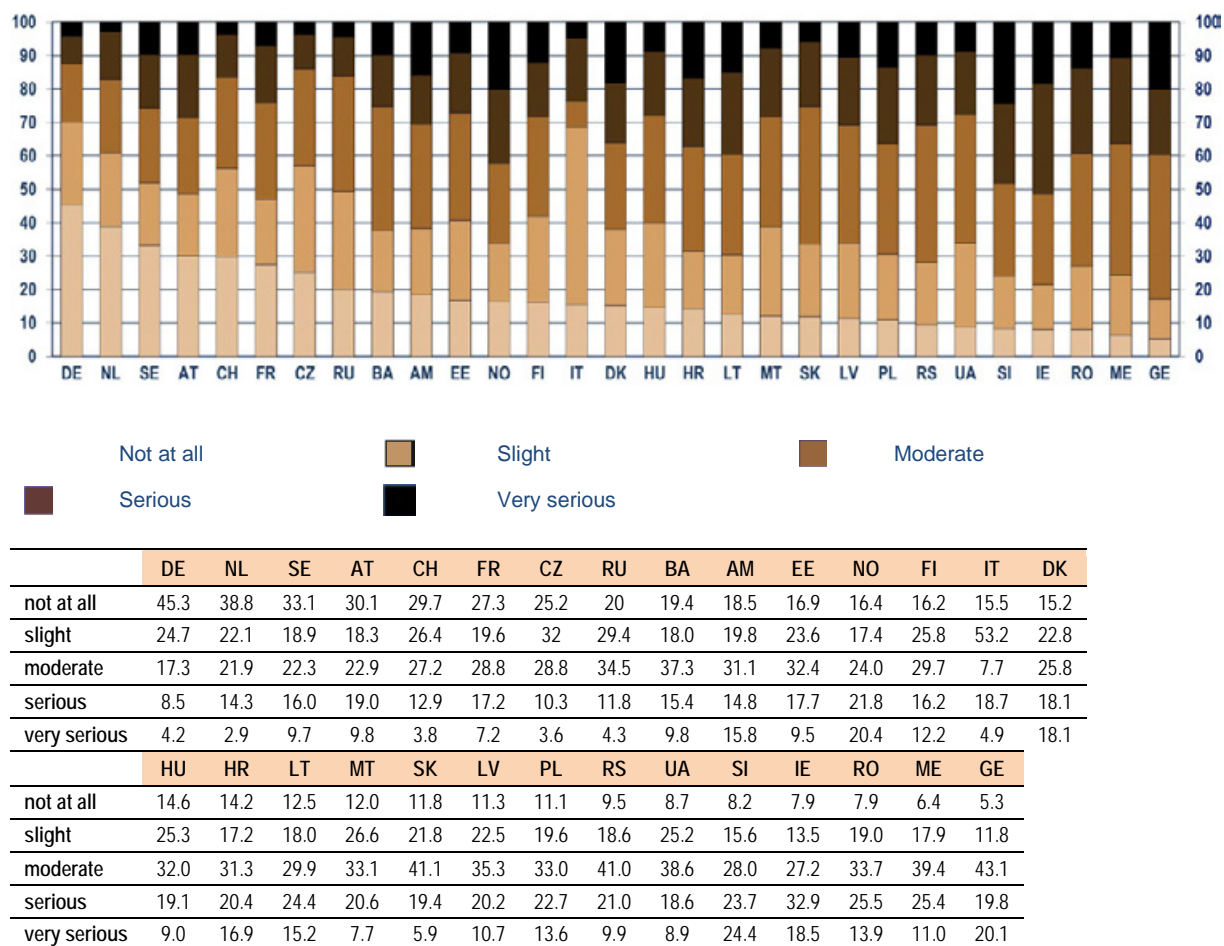
Source: EUROSTUDENT V, G.13.

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. 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.

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



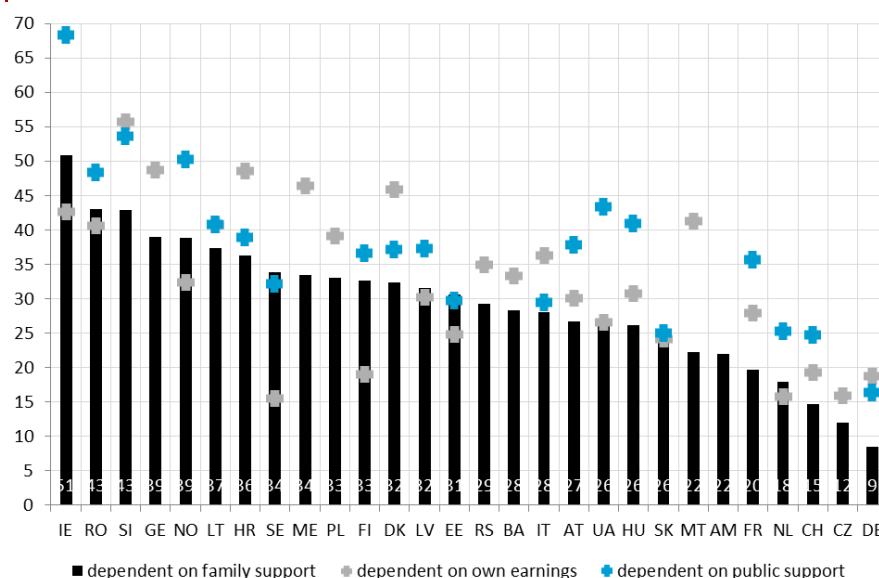
Notes: EUROSTUDENT Question(s): To what extent are you currently experiencing financial difficulties?

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: 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.

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.

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 earnings provide the safest way out of financial struggles. These countries are Ireland, Romania, Norway, Sweden, Finland, Latvia, Estonia, Slovakia and the Netherlands.

In the second group, while public support is still the least adequate to cover the costs of students, 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. Nevertheless, 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 twelve systems, the two statuses coexist.

Figure 4.30: Status of doctoral candidates, 2013/14



Source: BFUG questionnaire

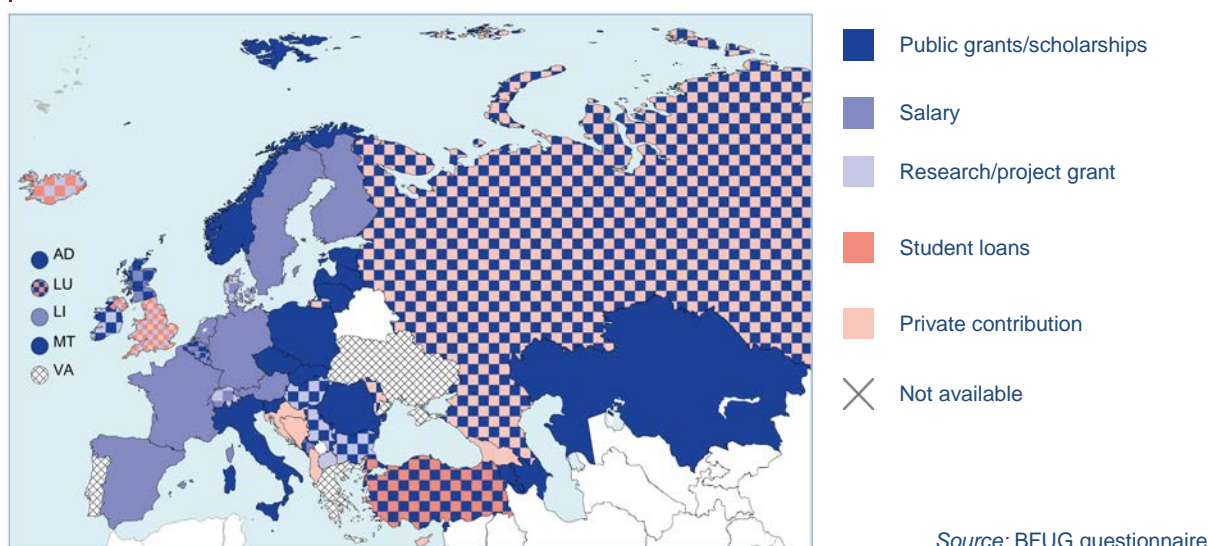
When it comes to fees required to be paid by doctoral candidates, these are most often lower than fees paid by first and second cycle students (e.g. in Belgium, Bulgaria ⁽²³⁾, the Czech Republic, Finland, Romania, Sweden and Switzerland). The same fee levels are reported to exist for all the three cycles in Andorra, Bosnia and Herzegovina, Estonia, Germany, Georgia, Hungary, Iceland, Liechtenstein, Luxembourg, and Russia. 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.

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

⁽²³⁾ While doctoral candidates pay higher fees in their first year, they are exempt from fee-paying in later years.

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, Hungary, Latvia or Turkey). Doctoral candidates receive a salary as employees in 15 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, Luxembourg, Turkey and the United Kingdom (England, Wales and Northern Ireland).

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



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 under-represented. 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 under-represented. 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' ⁽²⁴⁾, 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.

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.

⁽²⁴⁾ 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.

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.

5. LIFELONG LEARNING

The Bucharest Communiqué

The Bucharest Communiqué stated 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.

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 to understand 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 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. Flexible delivery of higher education programmes and lifelong learning therefore appear as two interlinked thematic areas. The analysis also shows 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 examines key aspects of lifelong learning in the higher education sector. 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 are in providing courses for non-traditional learners to participate in formal higher education programmes, and it also focuses on the participation of mature students in higher education.

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.

5.1. National understanding of the concept of lifelong learning

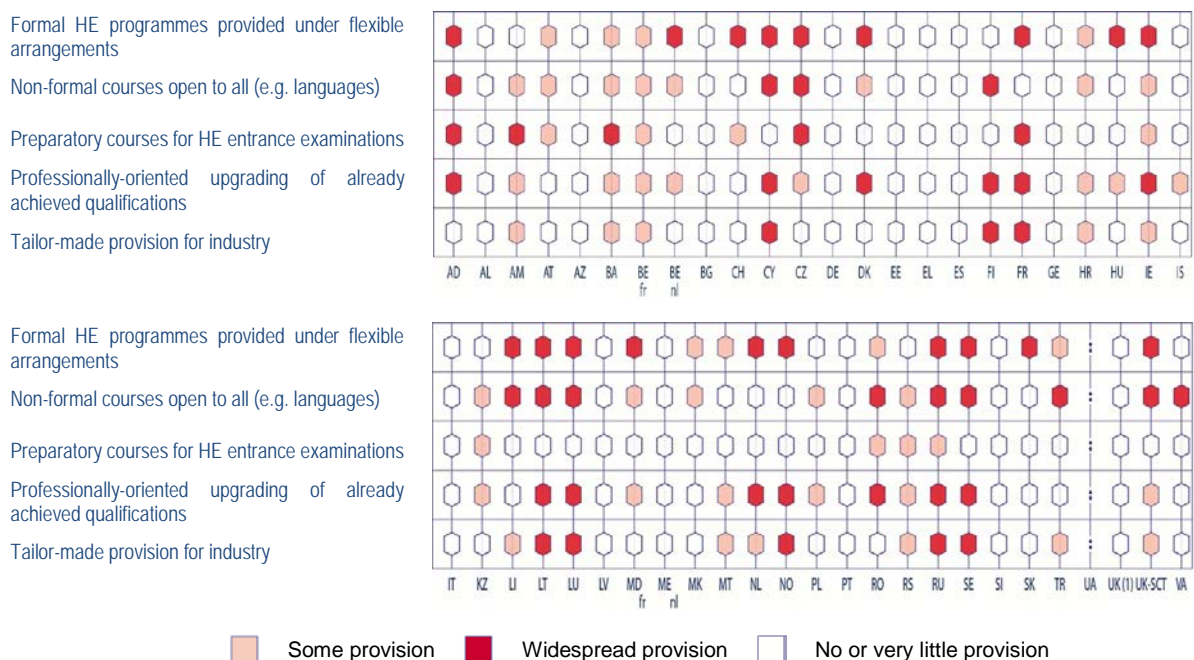
Higher education institutions play a central role in providing lifelong learning. This topic has been on the Bologna Process agenda from the very beginning, although often addressed as a secondary consideration in relation to other objectives. Nevertheless, higher education ministers have emphasised 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 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 definition of this term. In the new reporting exercise it was found that most definitions of lifelong learning are still broad. They refer again to learning 'from cradle to grave' or to all learning activities undertaken by individuals throughout their lives, be they formal, non-formal or informal. However, in addition to the general definitions, some of them focus on upgrading vocational skills (Estonia, Serbia) and meeting the needs of labour market and economy (Bulgaria and Serbia). 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 as share of Higher Education Institutions by country, 2013/14



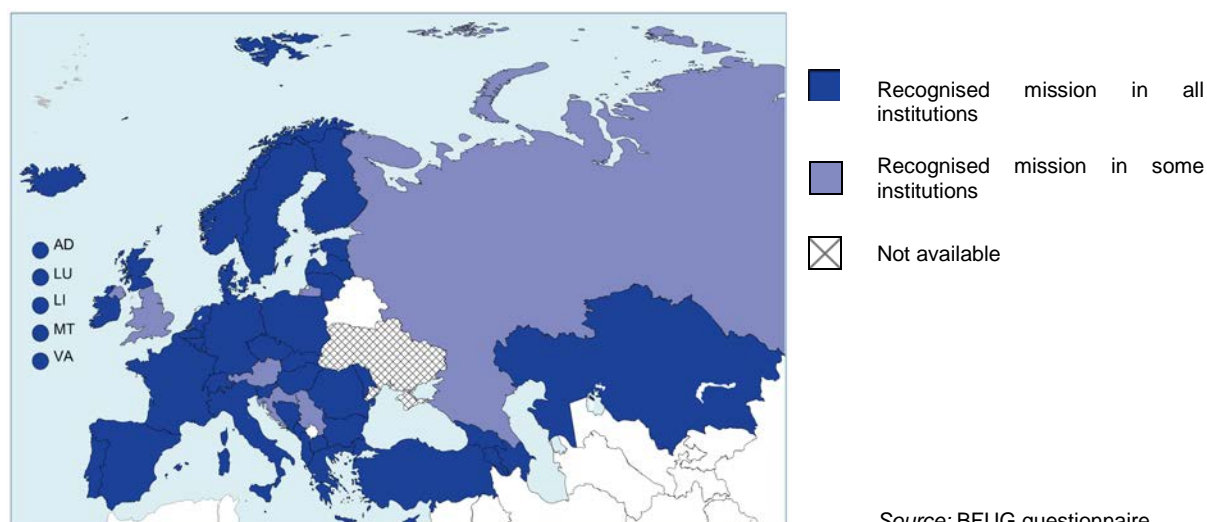
Source: BFUG questionnaire.

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

5.2. Lifelong learning as a recognised mission of higher education institutions

Lifelong learning is a recognised mission of all higher education institutions in more than three-quarters of EHEA countries, reflecting the centrality of this policy. 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, as opposed to only in some institutions (Armenia, Cyprus, Georgia, Moldova and Poland). 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



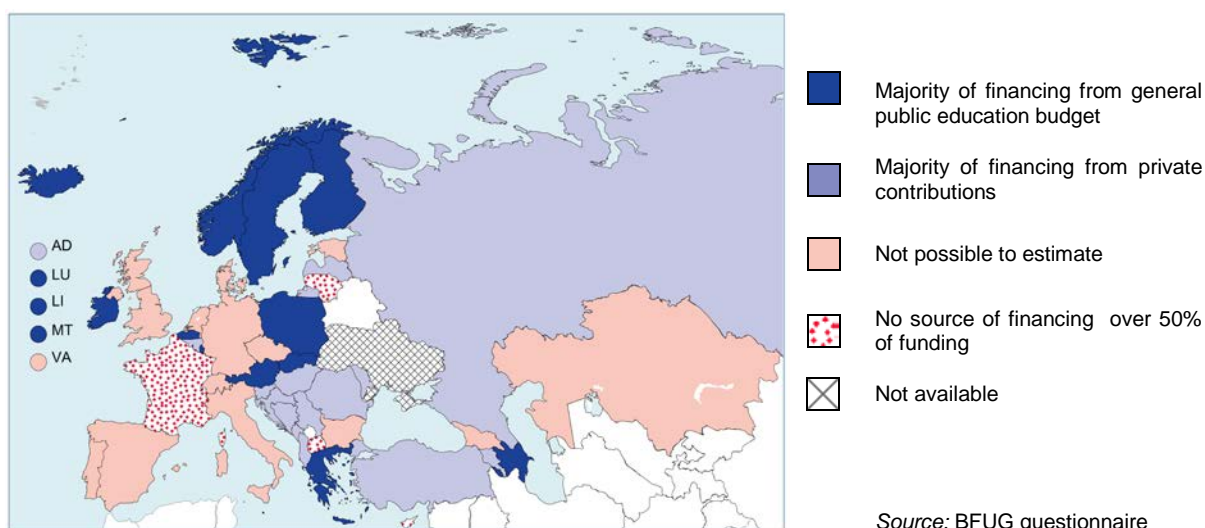
Source: BFUG questionnaire

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.

5.3. Financing lifelong learning

Financing lifelong learning is a difficult issue as there are few shared conceptions of lifelong learning that can lead to clarity of comparative information on funding. However, many countries have been able to provide data on the funding sources for lifelong learning, allowing more detailed analysis than in the 2012 report (see figure 5.3).

Figure 5.3: Sources of ¹financing ²for Lifelong Learning, 2013/14



In 40 out of 49 of higher education systems, higher education institutions do not have a public budget specifically for lifelong learning. Only eight countries have a specific budget for lifelong learning provision. 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. Students' contributions form over half of lifelong learning funding in 15 countries (Albania, Andorra, Armenia, Belgium (French Community), Bosnia-Herzegovina, Croatia, Hungary, Latvia, Moldova, Montenegro, Romania, Russia, Serbia, Slovenia and Turkey).

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 11 systems (Albania, Andorra, Belgium (Flemish

¹ Comment to the Czech Republic: Regarding your question, as you have given answers to Figure 5.1 about LLL provision, you can give estimates of funding for those same provisions, so we can include the funding source in this map for your country.

² QUESTION TO POLAND: You stated that statistical data on funding of LLL is not collected. To confirm, does this mean that you wish to be shown as "not possible to estimate"?

Community), 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 of 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.

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

Only some countries reported that policy focus for 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, or e-learning, was the most common approach to flexible course provision. Contrary to a common trend restricting the time allowed for completing degree studies, Luxembourg has abolished the legal limit for the maximum study time for completing the degree. 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.

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. Rather than trying to analyse national definitions of all the different types of students in a system, this report attempts to identify whether or not there are other kinds of student status than full-time student.

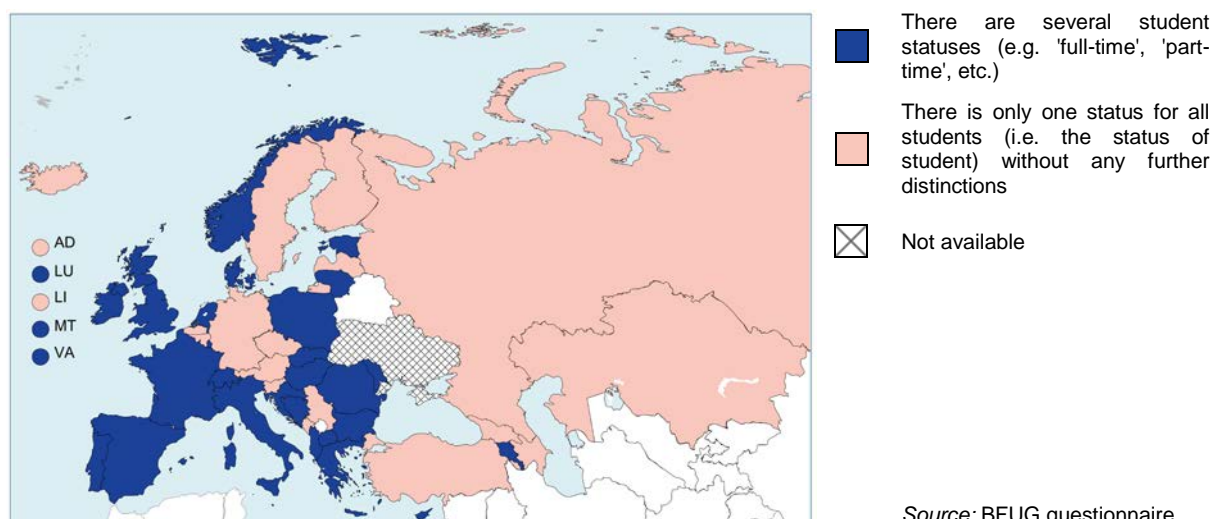
The situation regarding student status remains very similar across Europe compared to the previous reporting exercise. The majority of countries formally still recognise at least one additional student status alongside the status of a full-time student. Figure 5.4 provides a picture of the situation across the EHEA. It shows that in around two-thirds of 49 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 emphasise what a part-time student needs to achieve within a given timeframe.

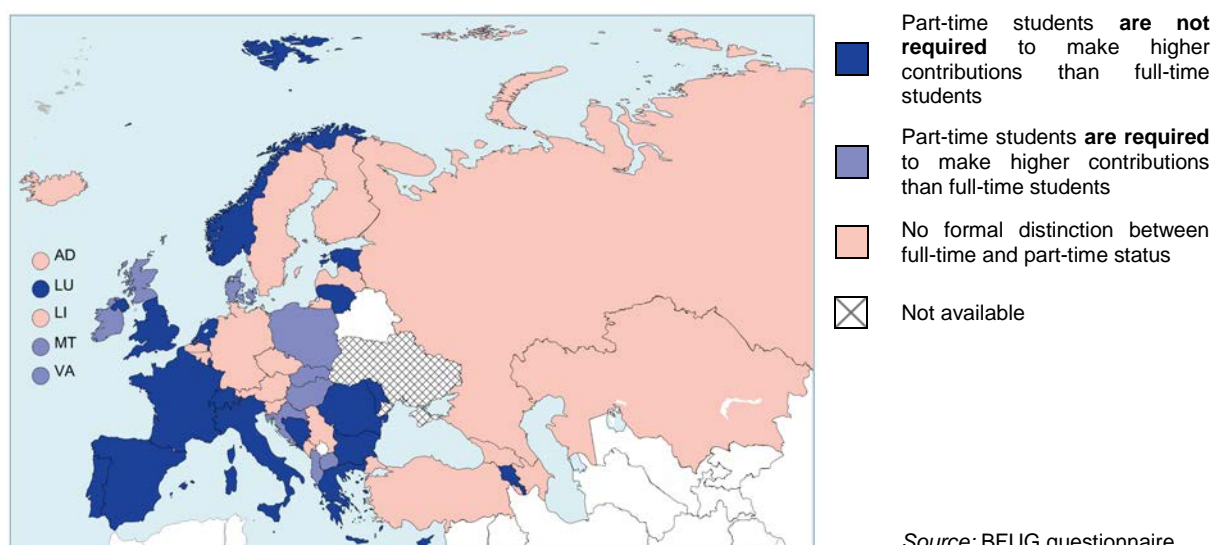
In Greece and Slovakia part-time studies are defined as expected hours of study per week. In Greece, the law expects part-time students to study at least 20 hours per week. In Slovakia, the required hours are defined as study hours per academic year, 750 to 1440 hours for part-time student, as opposed 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



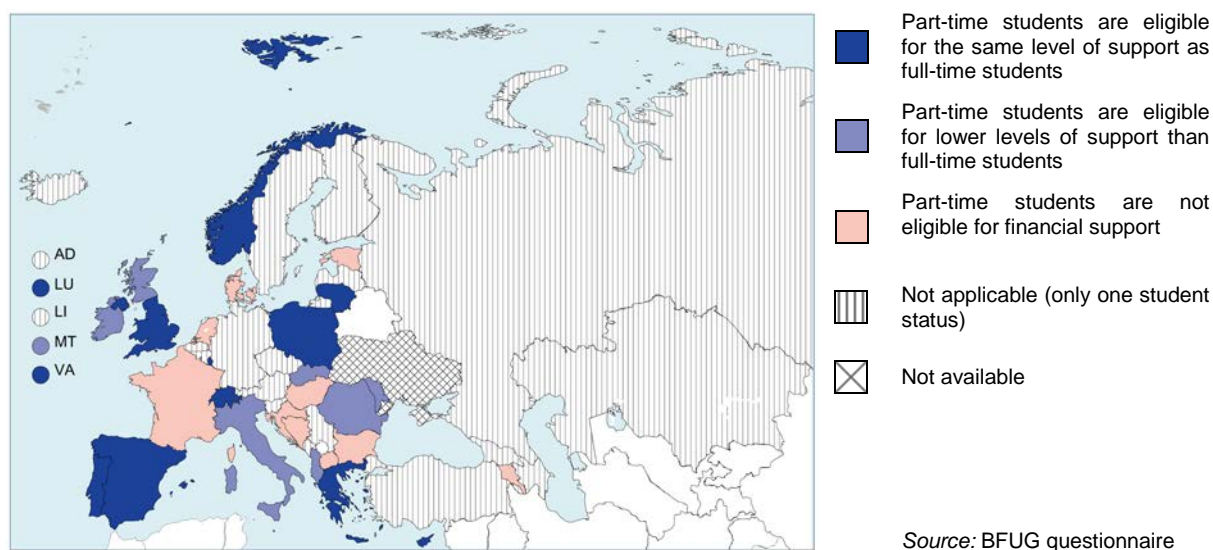
In eight systems (Albania, Croatia, Denmark, the former Yugoslav Republic of Macedonia, Holy See, Hungary, Ireland, and Malta), part-time studies are likely to be related to higher private financial investment than full-time studies (Figure 5.5). For example, in Denmark there are no fees for full-time 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



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.

Figure 5.6. Impact of student status on eligibility of financial support for students, 2013/2014

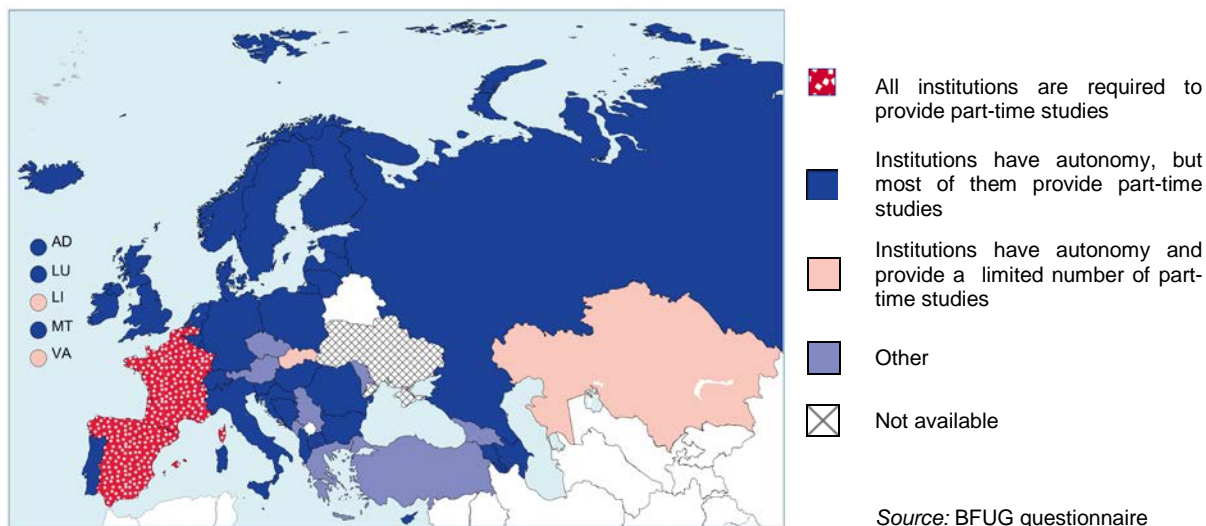


5.4.3. Provision of part-time studies by higher education institutions

Higher education institutions in the majority of EHEA countries can decide if they wish 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

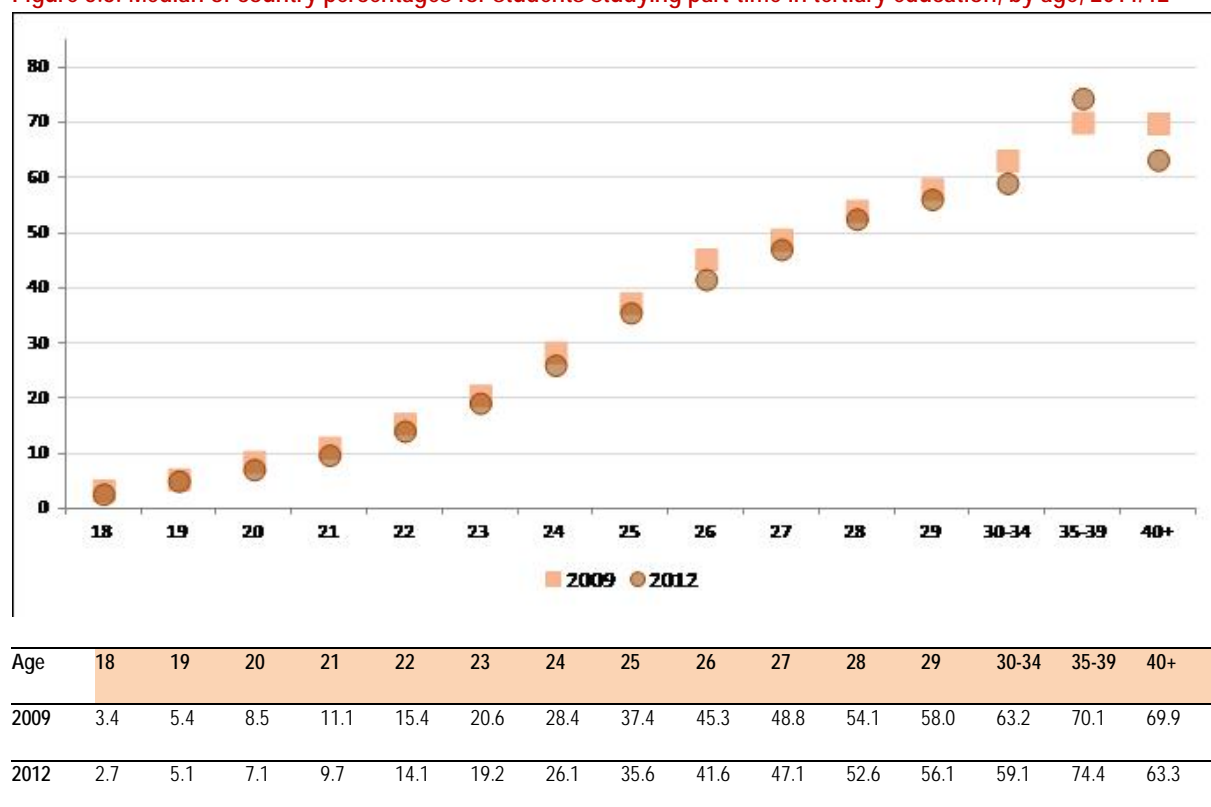


5.4.4. Statistical data on student participation in part-time studies

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



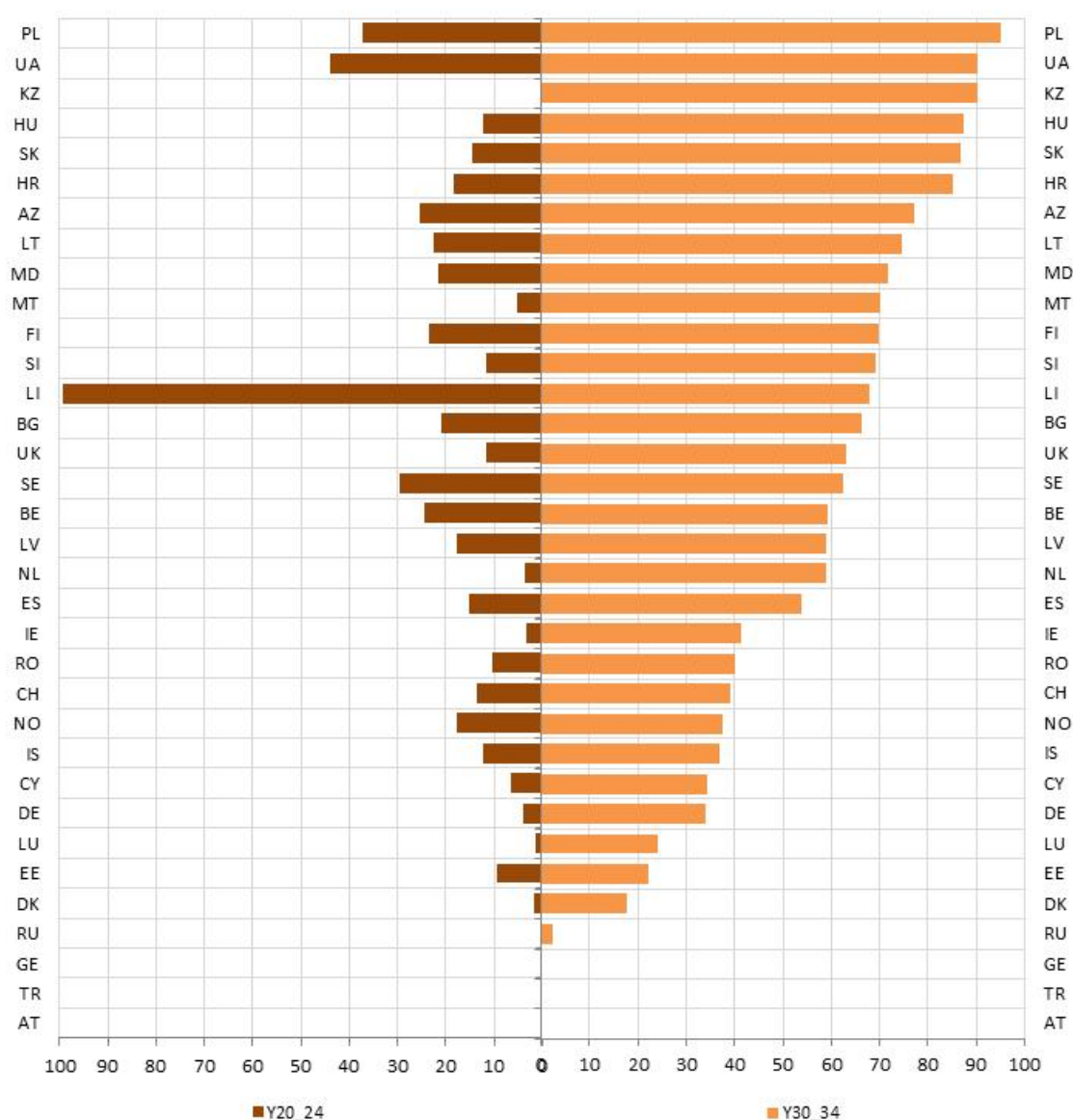
Notes: Moldova: data only cover ISCED level 5. [To be included].

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

Figure 5.8 clearly indicates that the age of students influences part-time studying. Older students are much more likely to study part-time than their younger peers. In the EHEA countries, fewer 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



	PL	UA	KZ	HU	SK	HR	AZ	LT	MD	MT	FI	SI	LI	BG	UK	SE	BE
Y20_24	37.2	43.9	:	12.2	14.6	18.4	25.3	22.4	21.4	5.4	23.4	11.7	99.4	20.9	11.7	29.7	24.5
Y30_34	95.0	90.3	90.3	87.5	86.8	85.1	77.3	74.7	71.6	70.0	69.6	69.0	68.0	66.3	63.2	62.5	59.3
	LV	NL	ES	IE	RO	CH	NO	IS	CY	DE	LU	EE	DK	RU	GE	TR	AT
Y20_24	17.9	3.6	15.0	3.3	10.3	13.5	17.7	12.4	6.5	3.9	1.3	9.4	1.7	0.4	0.0	0.0	0.0
Y30_34	58.8	58.8	53.7	41.5	40.0	39.0	37.6	36.8	34.2	33.9	24.1	22.1	17.7	2.3	0.0	0.0	0.0

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.

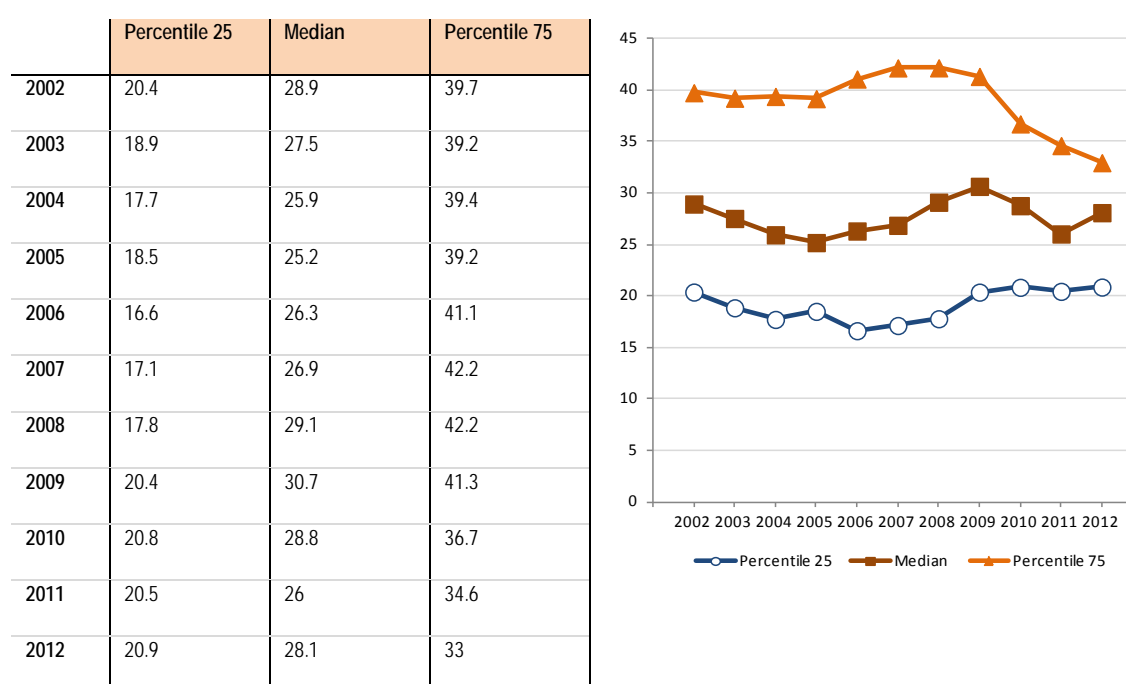
The older the students are, the more likely they are to study part-time in all countries. The share of part-time students of the total student population among the 30 to 34-year-olds vary from 18 % (Denmark) to 95 % (Poland). Part-time students form a substantial proportion of older students in half 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 much 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 tertiary students are part-time students (academic year 2011/2012) in half of the EHEA countries for which data is available. Between 2008/2009 and 2010/2011, the number of part-time students declined, but rose again for the academic year 2011/2012. Such decline is also observed when considering the top fourth of the distribution of the EHEA countries for which data is available. In 2008/2009, part-time students accounted for more than 41 % in one fourth of the EHEA countries and then share fell to 33 % in 2011/2012.

Figure 5.10: Median, percentile 25 and percentile 75 of the percentage of students studying part-time in tertiary education, by year, 2002-2012

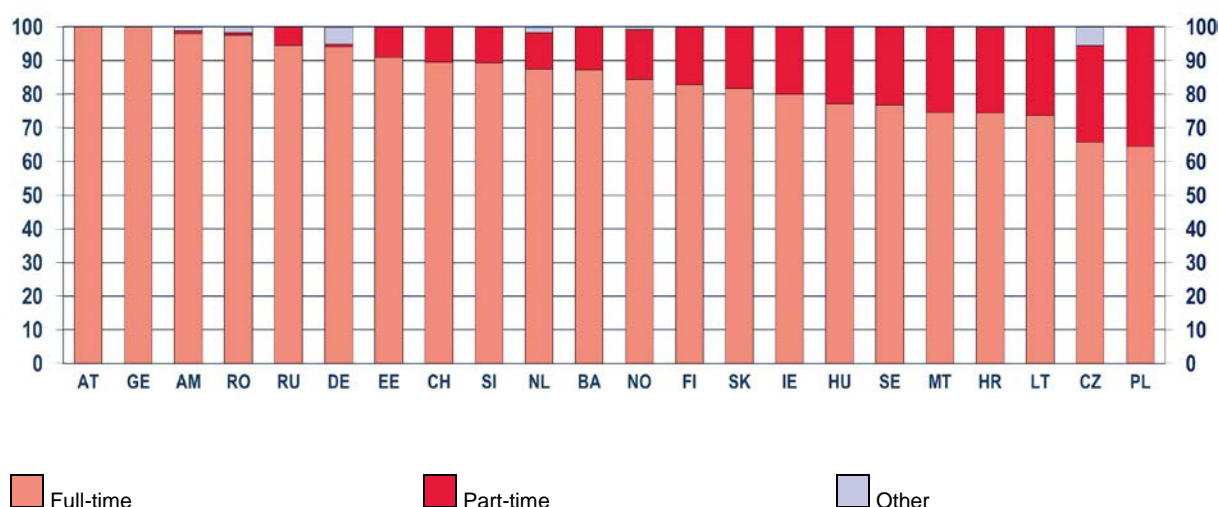


Notes: Percentiles and Median have been computed on available data for each year. Thus the geographical coverage varies according to the reference years.

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

Eurostudent research 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



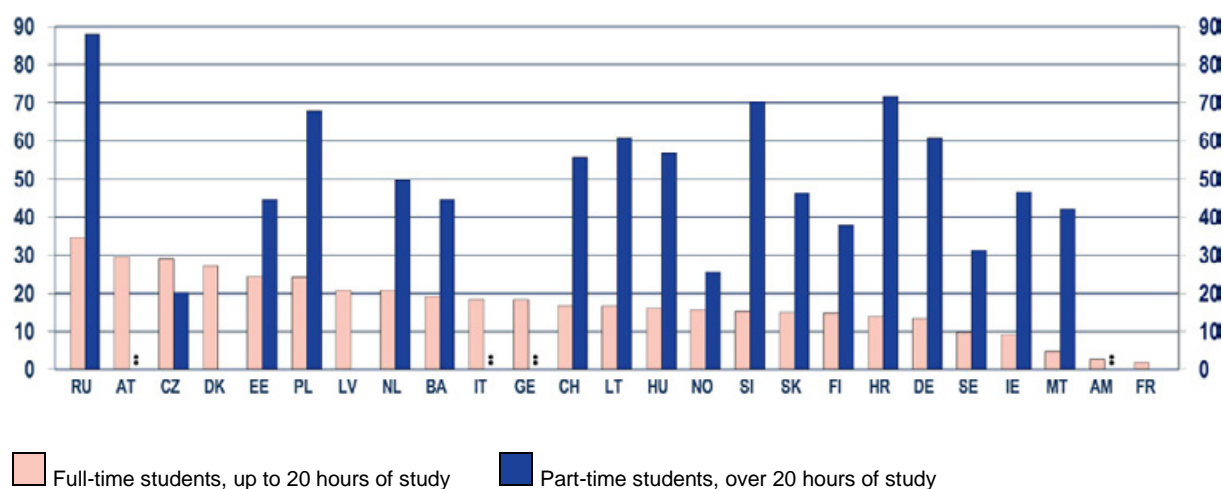
	AT	GE	AM	RO	RU	DE	EE	CH	SI	NL	BA
FT	100,0	100	98	97,5	94,5	94	90,9	89,5	89,3	87,4	87,3
PT	0	0	0,8	0,8	5,5	0,8	9,1	10,5	10,7	10,8	12,7
Other	0	0	1,2	1,7	0	5,1	0	0	0	1,7	0
	NO	FI	SK	IE	HU	SE	MT	HR	LT	CZ	PL
FT	84,4	82,9	81,7	80	77,2	76,8	74,5	74,4	73,7	65,7	64,5
PT	14,8	17,1	18,3	20	22,8	23,2	25,5	25,3	26,3	28,8	35,5
Other	0,8	0	0	0	0	0	0	0,3	0	5,5	0

Source: Eurostudent.

According to Eurostudent-data, over 80% of students report themselves to be full-time students. In six countries (Ireland, Hungary, Malta, Sweden, Lithuania, and the Czech Republic), over 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 students who spend up to 20 hours per week on studies, and part-time students who study over 20 hours per week. 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. For example, in Russia, Austria and the Czech Republic, where only official full-time student status exists, around 30% of students report studying up to 20 hours per week. Furthermore, in Latvia and Georgia, around 20% of students can be considered as *de facto* part-time students. By contrast, in 8 countries (Russia, Poland, Switzerland, Lithuania, Hungary, Slovenia, Croatia and Germany), over half of the part-time students report high study intensity of over 20 hours per week.

Figure 5.12: Full-time and part-time students by hours spent on study-related activities in a typical week in %, 2013/14



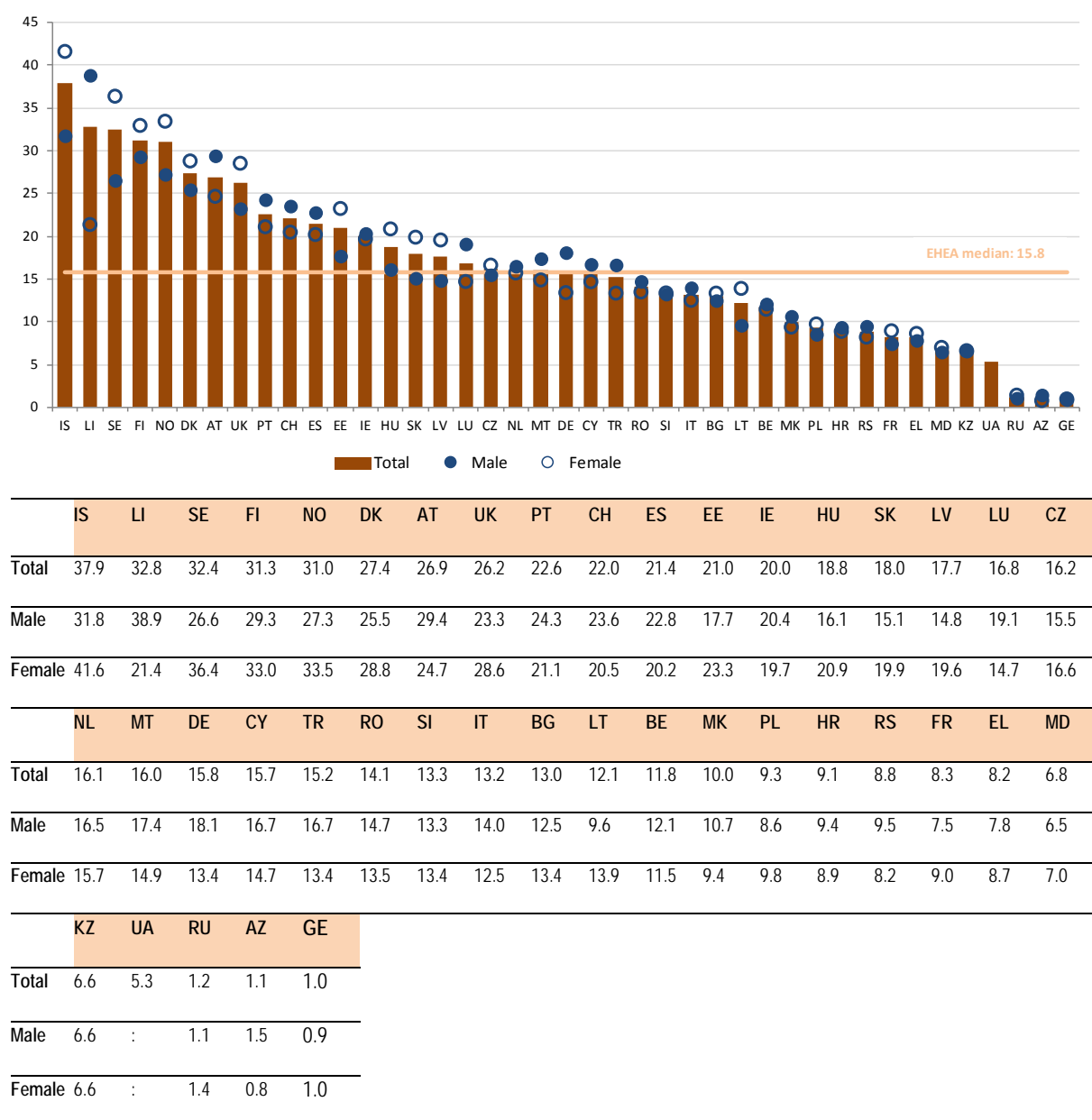
	RU	AT	CZ	DK	EE	PL	LV	NL	BA	IT	GE	CH	LT
FT up to 20hrs	34,7	29,4	29	27,2	24,3	24,1	20,9	20,7	19,2	18,5	18,4	16,8	16,7
PT over 20 hrs	88	:	20,2		44,5	67,8	0	49,7	44,6	:	:	55,7	60,8
	HU	NO	SI	SK	FI	HR	DE	SE	IE	MT	AM	FR	
FT up to 20hrs	16,2	15,7	15,2	15	14,9	13,8	13,4	9,8	9,1	4,8	2,8	1,9	
PT over 20 hrs	56,8	25,6	70,2	46,2	37,8	71,6	60,8	31,1	46,8	42,2	:		

Source: Eurostudent.

5.5. Participation of mature students and delayed transition students in formal higher education provision

Figure 5.13 focuses on the age composition of the student population for a given reference year and allows identifying the countries where the population of “mature students” (i.e. 30 or more years) 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



Notes: Moldova: data only cover ISCED level 5. [To be included].

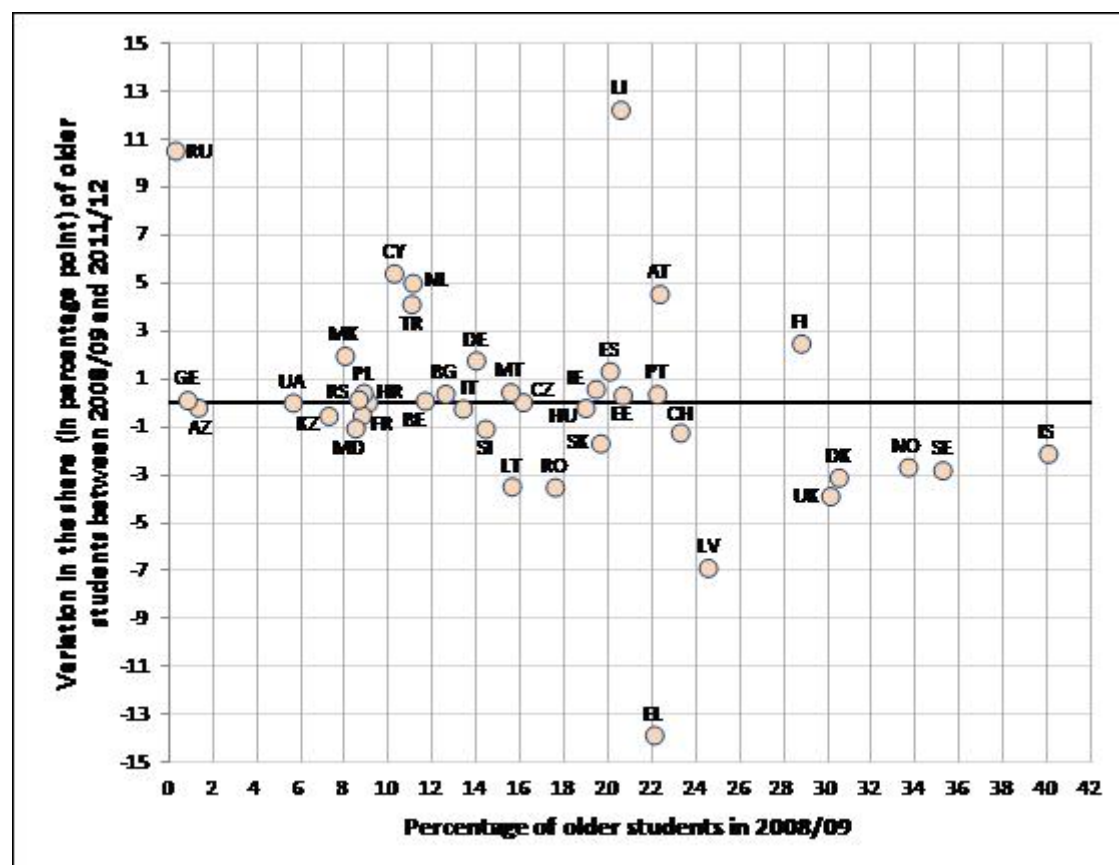
Source: Eurostat, UOE and additional collection for the other EHEA countries.

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 2011/2012) 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’ are 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 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
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
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
	RO	CZ	LT	MT	SI	DE	IT	BG	BE	NL	TR	CY	HR	PL	FR	RS	MD
2008/09	17.6	16.1	15.6	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
2008/09-2011/12 (variation in pp)	-3.5	0.1	-3.5	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
	MK	KZ	UA	AZ	GE	RU											
2008/09	8.0	7.3	5.63	1.31	0.83	0.28											
2008/09-2011/12 (variation in pp)	2.0	-0.5	0.03	-0.18	0.14	10.6											

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.

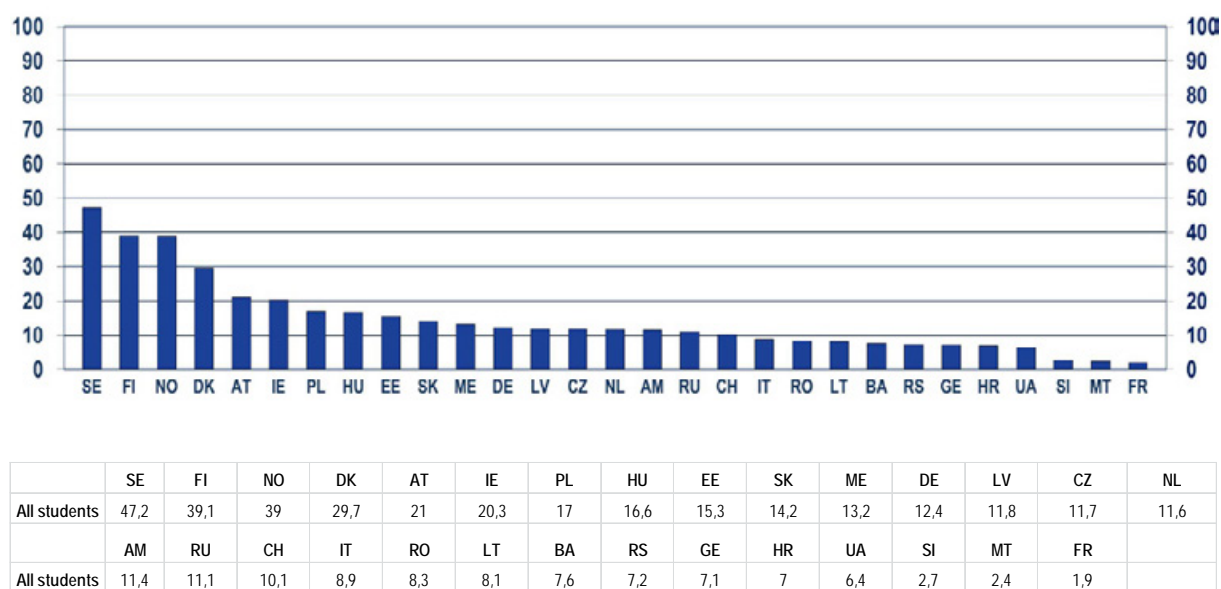
The strongest decrease in such a share is observed in Greece (where the percentage of older students moved from 22 % in 2007/08 to 8 % in 2011/12), in Latvia (a 6.9 percentage point decrease) and the United Kingdom (a 3.9 percentage point decrease). In many countries the proportion of older students 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).

Despite showing different proportions of older students at the beginning of the period, 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 2 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).

Figure 5.15: Share of delayed transition students in the overall student population, 2013/14

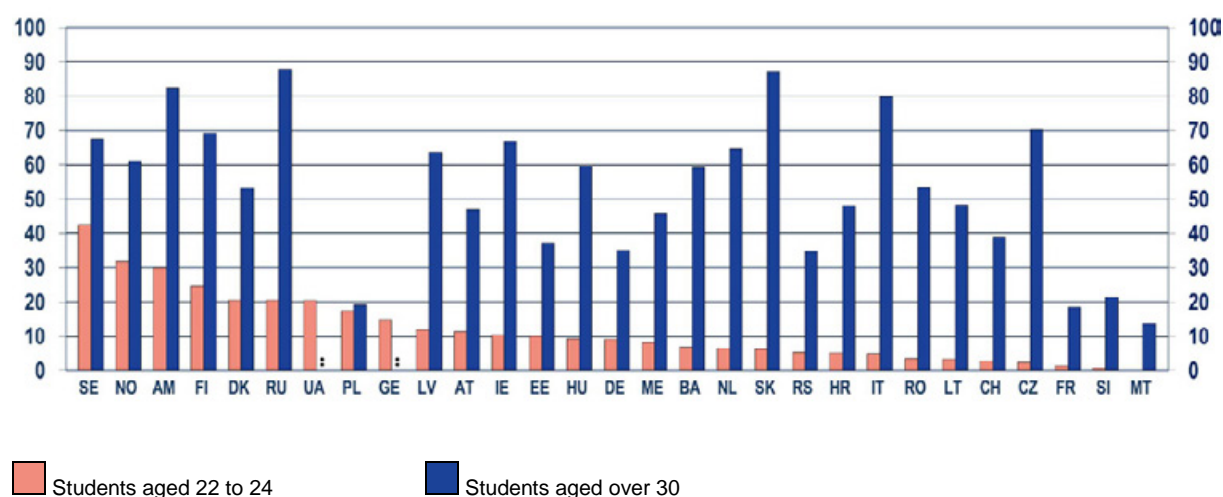


The last reporting exercise provided data only for the overall student population without any reference to age. This time, however, the data shows two different age groups (22 to 24 year-olds and over 30 year-olds, see Figure 5.15), allowing a more detailed analysis.

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 in the student population by age, 2013/14



	SE	NO	AM	FI	DK	RU	UA	PL	GE	LV	AT	IE	EE	HU	DE
22 to 24 yo	42,5	31,9	29,9	24,6	20,6	20,6	20,4	17,2	14,8	11,9	11,3	10,4	10	9,3	9,1
Over 30yo	67,5	60,9	82,5	69,3	53,1	87,9	:	19,1	:	63,6	47	66,7	37,2	59,4	35,1
	ME	BA	NL	SK	RS	HR	IT	RO	LT	CH	CZ	FR	SI	MT	
22 to 24 yo	8,2	6,9	6,5	6,3	5,4	5,3	5	3,5	3,4	2,8	2,3	1,5	0,6	0	
Over 30yo	45,8	59,2	64,5	87,1	34,8	48,2	79,8	53,4	48,4	39	70,2	18,6	21,5	13,6	

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 statistics 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.

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.

Indeed, 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 x countries they do. Moreover, the financial support for part-time students is often more limited than for their full time counterparts. Indeed the two issues are often related as in most of the countries where part-time students need to make higher financial contributions, the support they receive is lower or does not exist.

It is worth considering for the future whether lifelong learning is an appropriate concept through which the crucial issues of adapting higher education systems to the demands of new learners are examined. As was found in this chapter, the concept of lifelong learning rarely well defined in operational terms within countries, even though the concept itself is recognised. Given the developing needs of more mature, adult students, it may be more useful to focus more specifically on the concept of adult education.

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 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.

⁽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 (see 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.

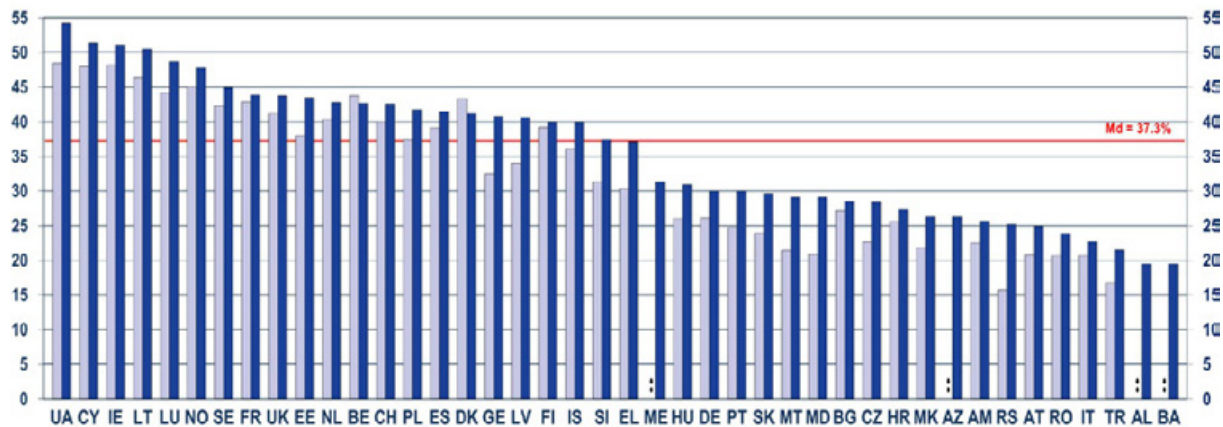
The countries where 35-44 year olds have higher tertiary attainment rates than the youngest age groups are Finland, and to a lesser extent Iceland, Spain, Switzerland and the United Kingdom. However, this pattern can be explained by the high share of mature students enrolled in tertiary education, particularly 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.

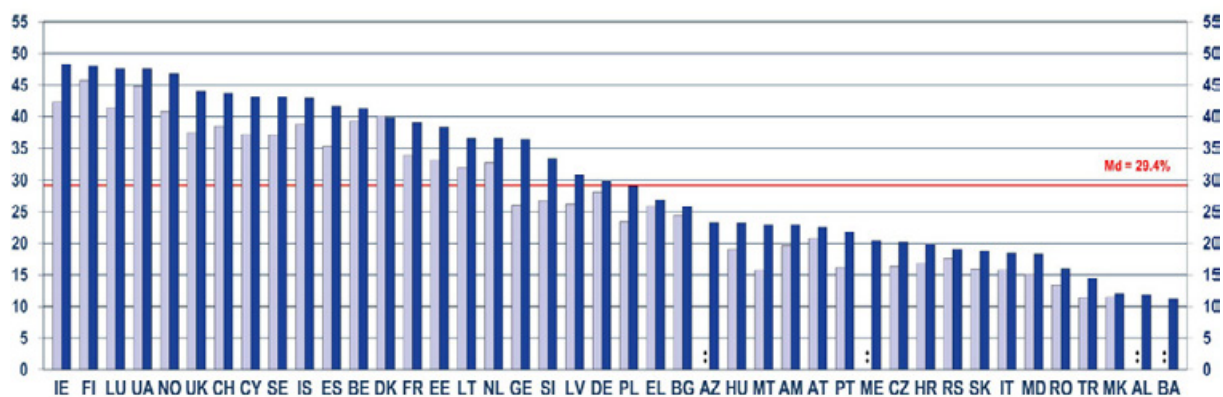
A comparison between tertiary attainment rates in 2010 and 2013 shows the directions of the most recent developments. In this last period, countries with the biggest increases in tertiary attainment among the youngest are Serbia, Moldova and Georgia. The countries where higher education attainment has 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

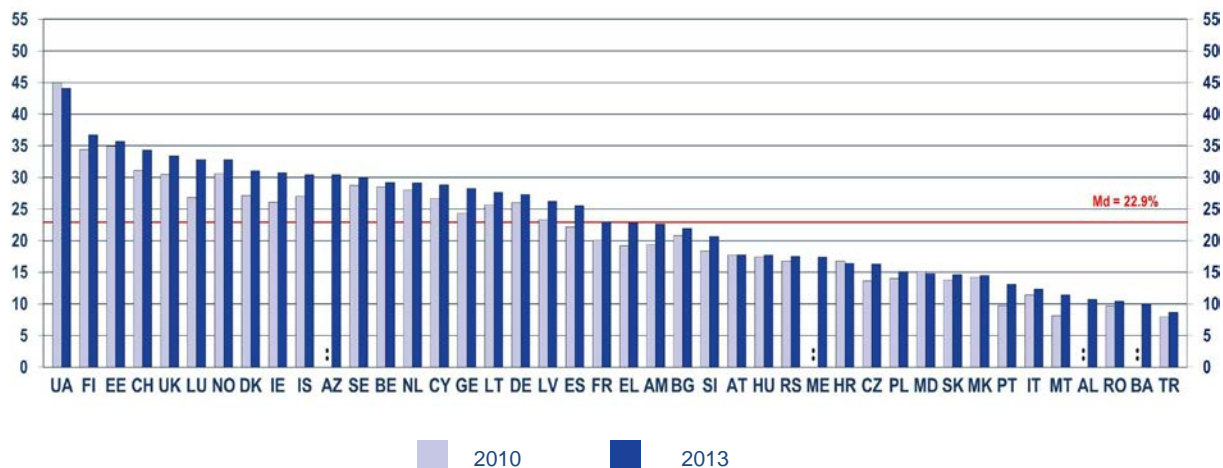
25-34 year olds



35-44 year olds



45-64 year olds



	2010	2013
25-34 year olds	54.2	51.4
35-44 year olds	47.7	43.1
45-64 year olds	44.1	28.8
2013	2010	2013
25-34 year olds	54.2	51.4
35-44 year olds	47.7	43.1
45-64 year olds	44.1	28.8
2013	2010	2013
25-34 year olds	54.2	51.4
35-44 year olds	47.7	43.1
45-64 year olds	44.1	28.8

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 (see also European Commission/EACEA/Eurydice, 2014a).

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

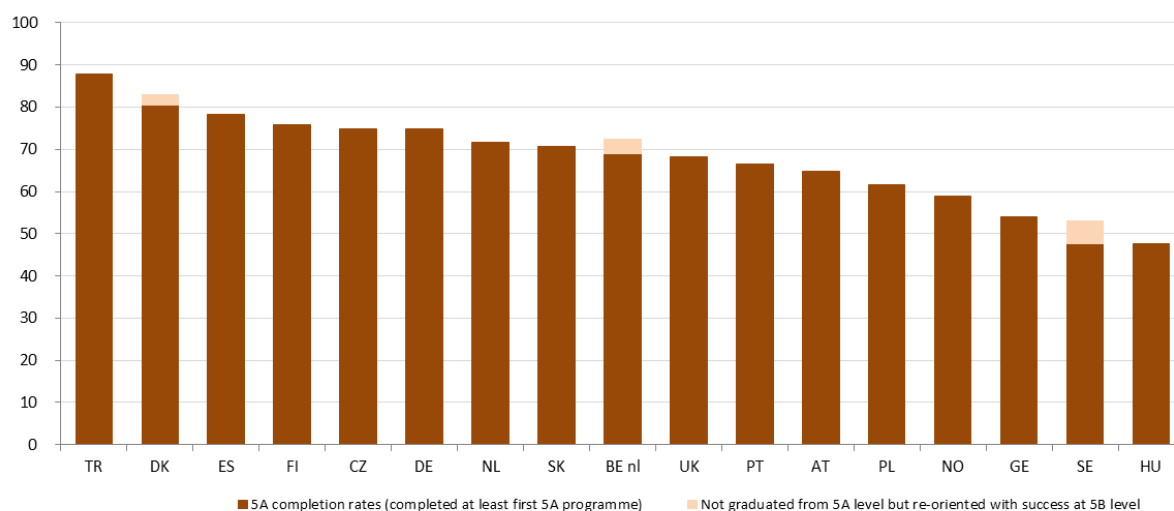
Completion rates

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 adequate 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. 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



	TR	DK	ES	FI	CZ	DE	NL	SK	BE nl	UK	PT	AT	PL	NO	GE	SE	HU
Completion rate	88	80	78	76	75	75	72	71	69	68	67	65	62	59	54	48	48
Re-oriented		3			:				4			:		:	:	5	
Method	TC	TC	CS	TC	TC	TC	CS??	CS	TC	CS	CS	CS	CS	TC	:	TC	CS
Year for new entrants	2007-08	2000-01	2008-09	2000	2001	2002	2003-04	2006-09	2007-08	2007-08	2006-10	2006-08	2006-09	1999-2000	:	2002-03 / 2009-10	2006-07

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. 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, relatively low completion rates of less than 60 % are observed.

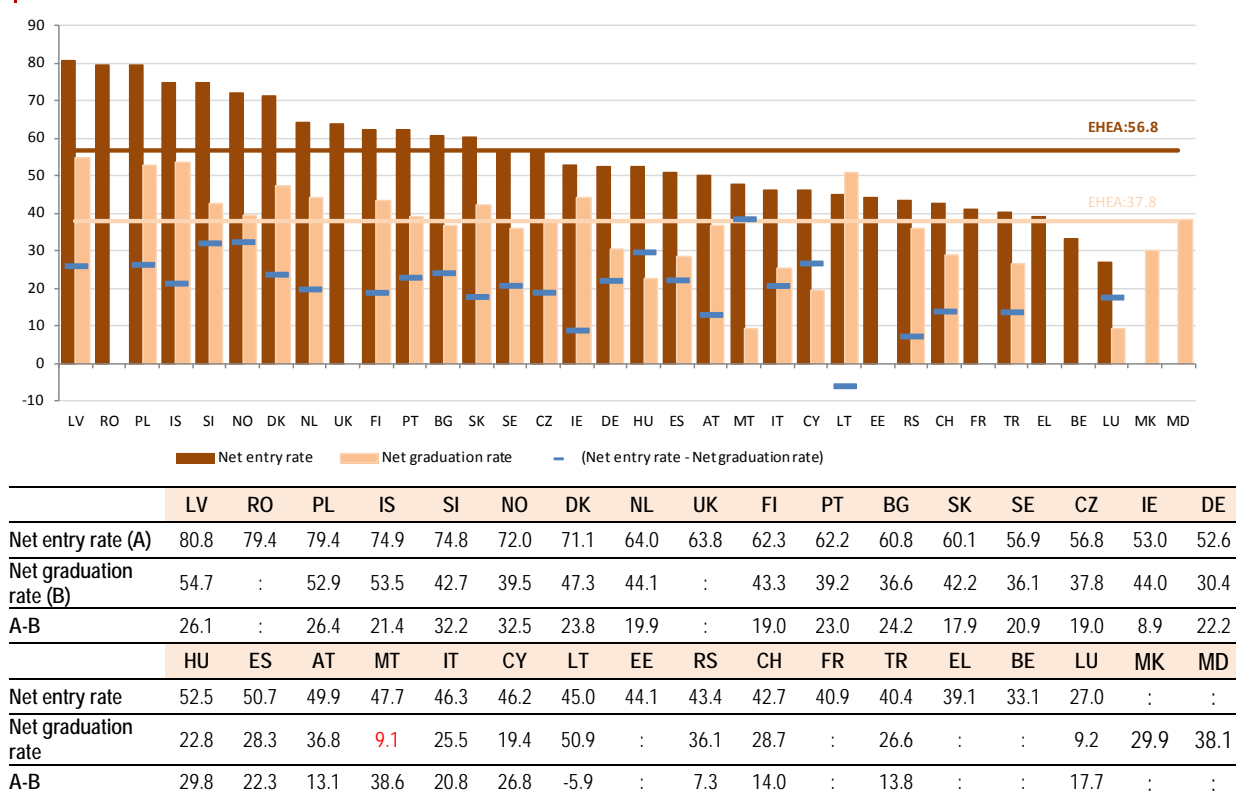
Among the countries with available data from 2008, completion rates decreased the most in Portugal (19 percentage points) and the United Kingdom (13 percentage points). In the same period between 2008 and 2011, completion rates increased with 8 percentage points in Germany and Slovakia.

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 for different types of tertiary education programmes 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. These net rates are computed as the sum of all entry rates and graduation rates, respectively, by single year of age, through every single age. The entry and graduation rates for a particular year of age, or an age range, are the ratio between the number of new entrants and graduates, respectively, of that age and the population size of the same age (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.

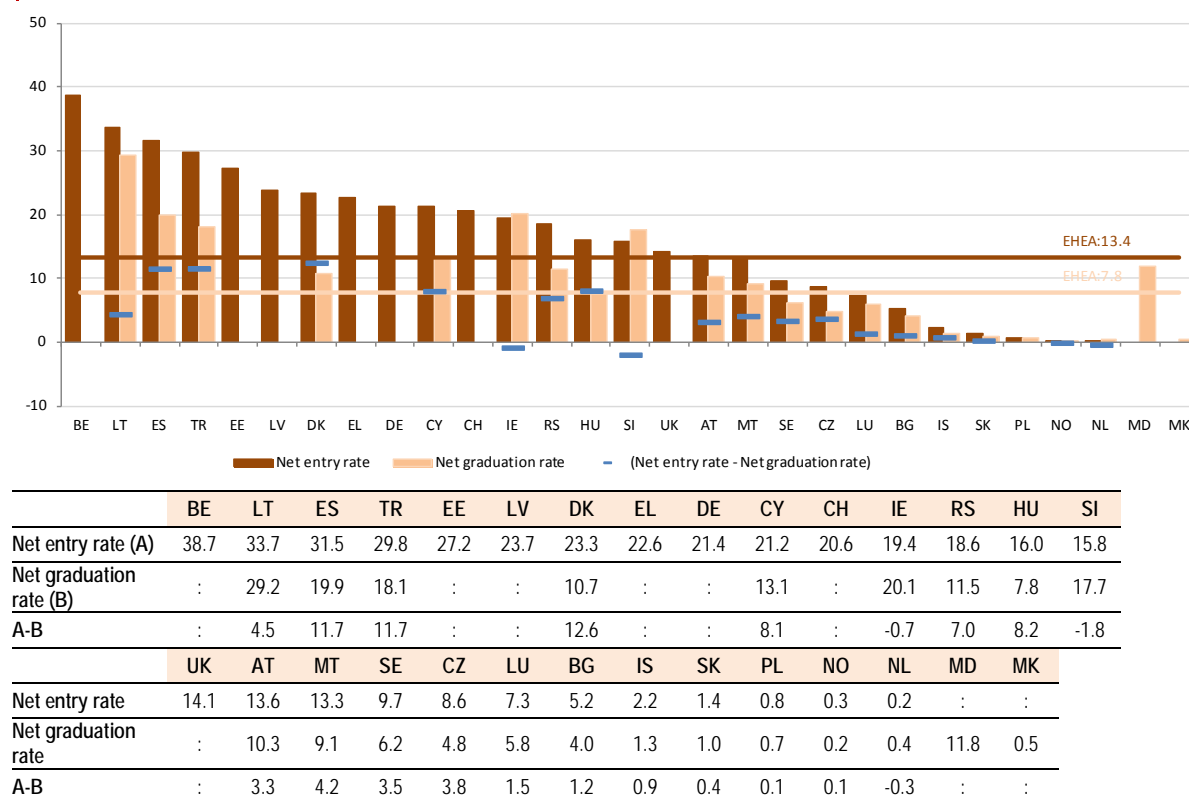
Figure 6.3: Net entry rate and net graduation rate (%), tertiary type A programmes, 2011/12



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.

Figure 6.4: Net entry rate and net graduation rate (%), tertiary type B programmes, 2011/12



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

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 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 ⁽⁵⁾.

The biggest differences between the net entry rate and the net graduation rate can be seen in Malta, 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 reflect the real drop-out magnitude in these systems. 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. Yet, system expansion may still confound this result and a high difference is not necessarily associated with a high dropout rate.

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

⁽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.

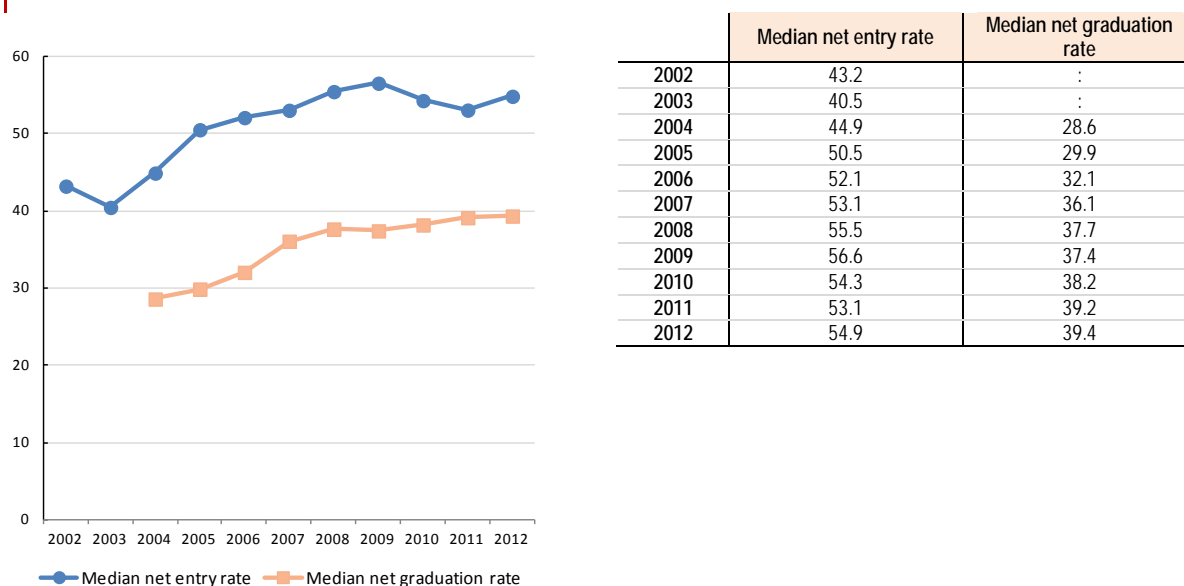
⁽⁵⁾ The gap between entry and graduation rates and tertiary attainment levels among the population (Figure 6.1) in Luxembourg results from the fact that Luxembourg has a very small tertiary sector, so young people are studying abroad. Moreover, the share of tertiary qualified foreign workers is high.

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.

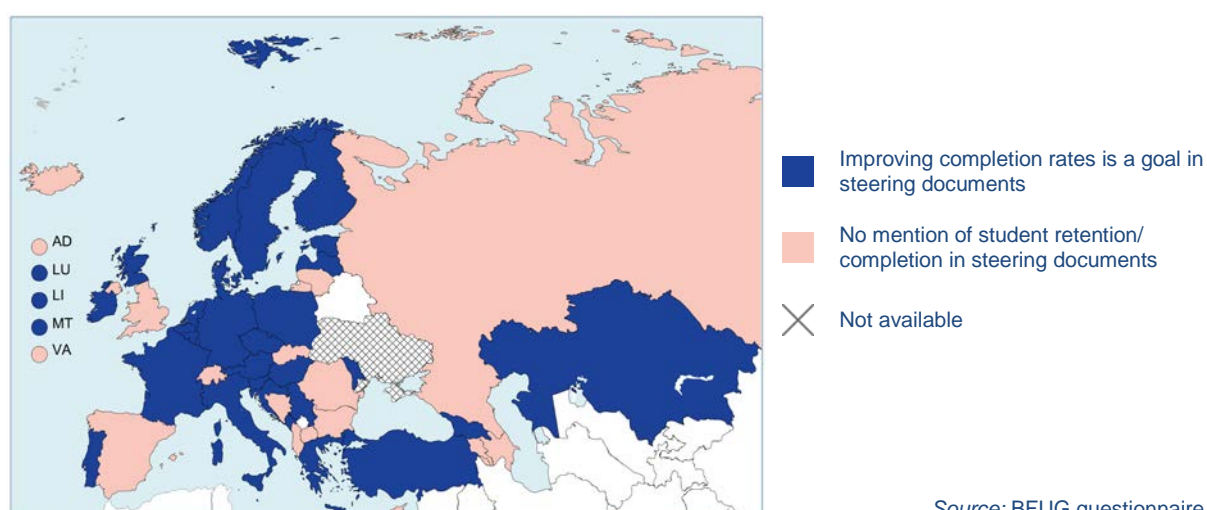
6.1.2. Policies for improving completion rates

This section provides an overview on national policies aiming to improve completion rates in the EHEA. After presenting the main directions of national policy frameworks, the section 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.

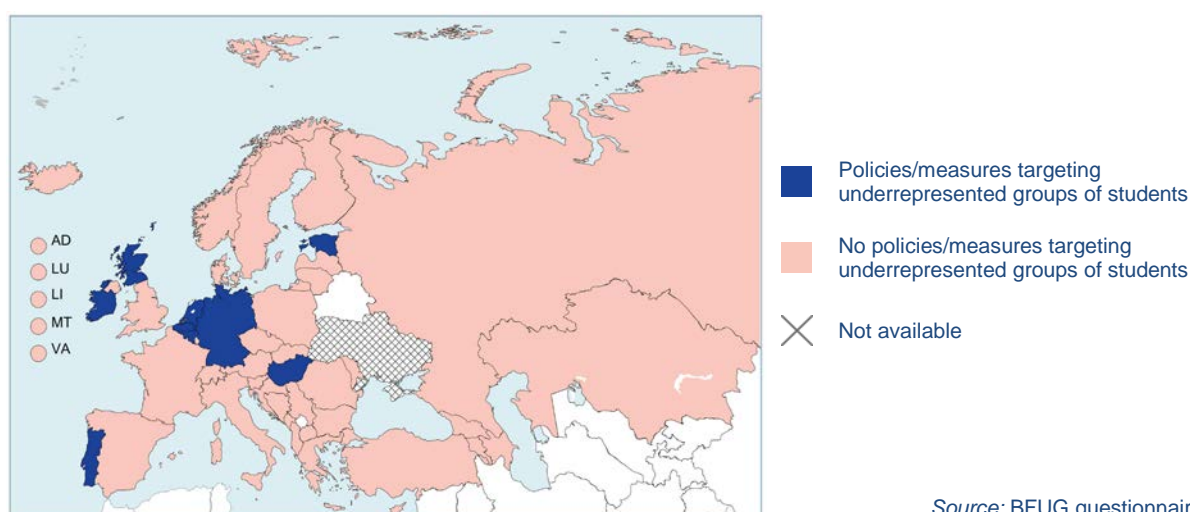
Concerning drop-out, Slovenia aims to lower it by two-thirds from the current 35 % by 2020, while Montenegro targets a 10 % drop-out rate by 2020. France concentrates efforts on specific programmes: there the objective is to lower the share of drop-outs from DUT (*Diplôme universitaire de technologie*), 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 nine higher education systems of the EHEA (see Figure 6.7): Belgium (Flemish and French Communities), Estonia, Germany, 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



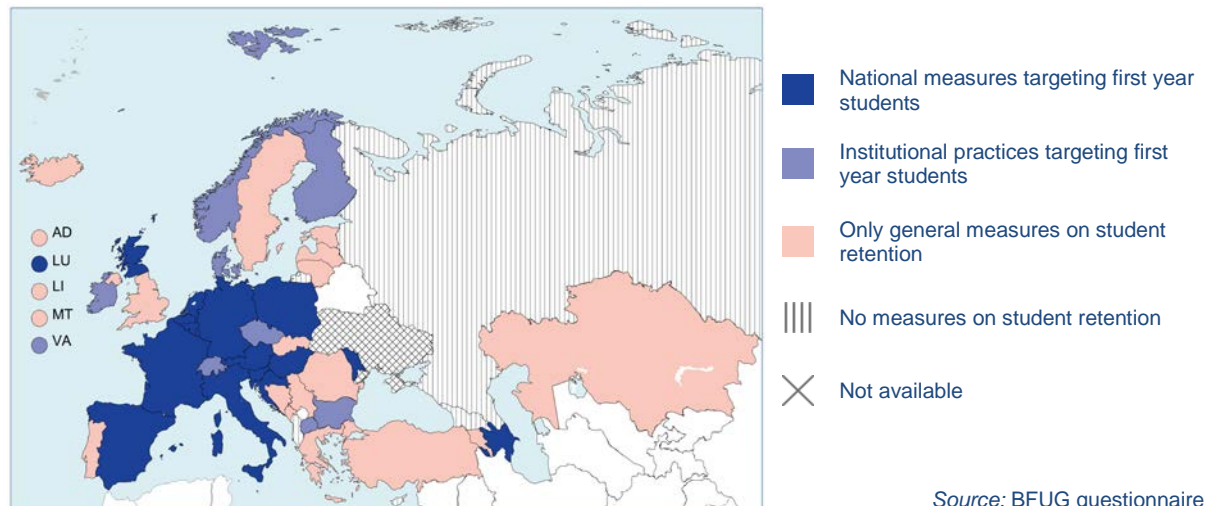
Source: BFUG questionnaire

Moreover, the definition of underrepresented groups differs widely in these countries. Thus policies focus on, inter alia, students with lower socio-economic background (Belgium, Germany, Hungary, Ireland, Portugal, the United Kingdom (Scotland)), students with parents without higher education qualification (Belgium, 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, Germany, the United Kingdom (Scotland)), students with children (Germany), ethnic or language minorities (Belgium (Flemish Community), Estonia, the Netherlands, the United Kingdom (Scotland)), students from segregated neighbourhoods (Hungary), or immigrants (Belgium (Flemish Community), Germany).

Reducing drop-out: improving the retention of first year students

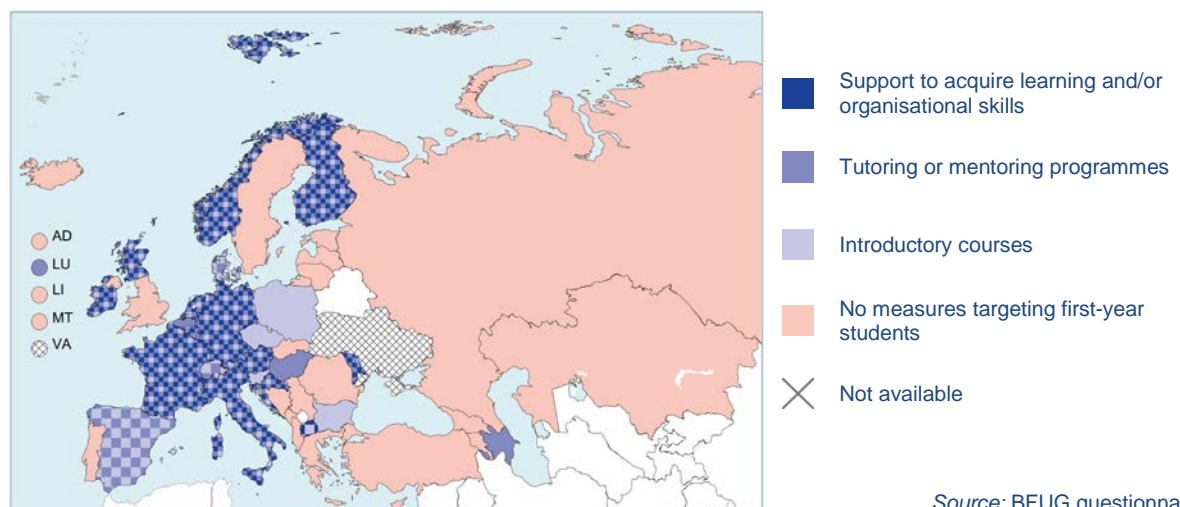
Research indicates that drop-out rates are the highest at the end of the first academic year. First-year students are particularly vulnerable to dropping out of higher education, since their expectations might be very different from what they actually encounter. Such mismatch can stem from the wrong 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



The three most common measures targeting newly admitted or first-year students are introductory or insertion courses, tutoring or mentoring programmes, and support provided to students to acquire learning and/or organisational skills. Figure 6.9 shows the measures countries encourage their higher education institutions to use in helping first-year students to adjust to the new learning environment.

Figure 6.9: Measures targeting the retention of first-year students, 2013/14



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.

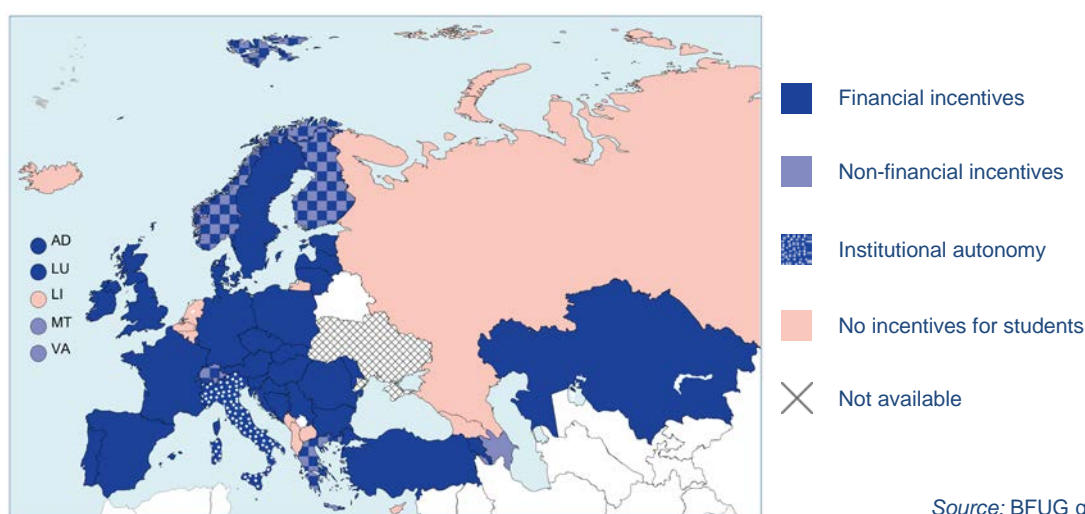
In addition, countries might also aim at lowering the chance of academic failure (or the sense of failure) by allowing students to retake exams multiple times or, as in Germany, to aim for abandoning examination-relevant marking for first-year students.

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.

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).

Figure 6.10: Incentives given to students to finish their studies on time, 2013/14



Source: BFUG questionnaire

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 or even have to pay extra fees if they do not finish their studies on time (e.g. this is the case in Armenia, the Czech Republic, Estonia, Finland, France, Latvia, Poland, Romania, Slovakia, Spain, Switzerland, Turkey, and the United Kingdom). 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.

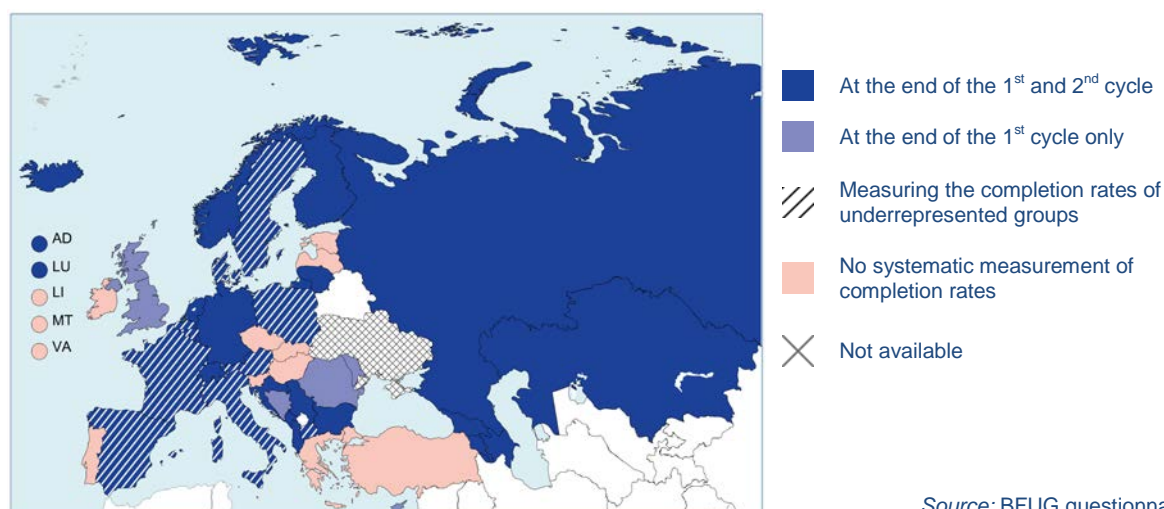
Positive financial incentives exist only in a few countries. In Croatia and Estonia, students acquiring a given number of credits are entitled to receive a tuition waiver (Croatia) or a merit-based grant (Estonia). Denmark is introducing a cash bonus for students who complete their studies faster than 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

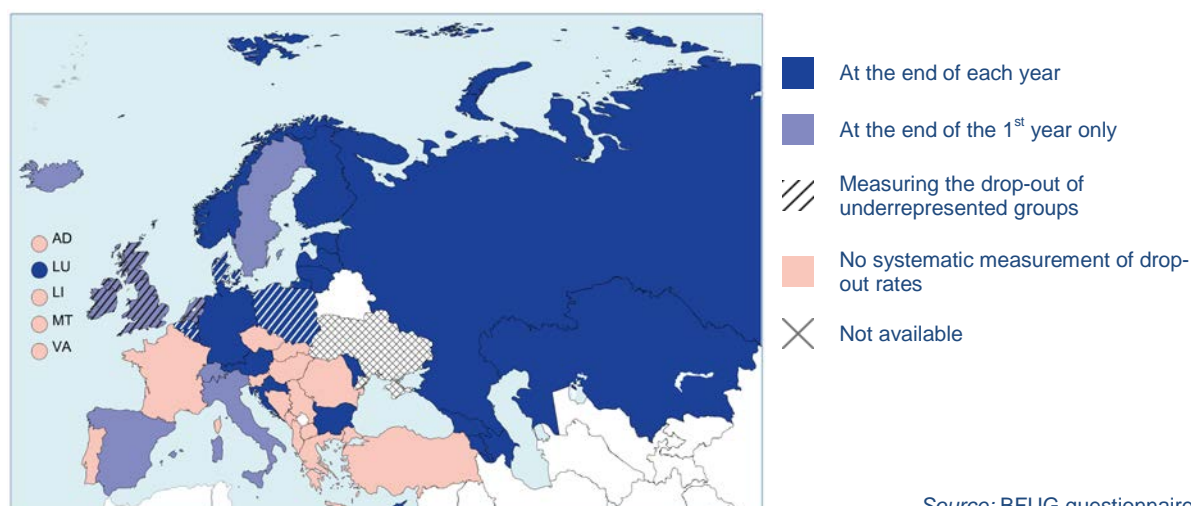
The evaluation of higher education institutions' performance is based on the calculation of completion and/or drop-out rates. The majority of EHEA countries systematically measure completion rates at the end of both the first and the second cycle (Figure 6.11). Drop-out rates are also systematically 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).

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

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.

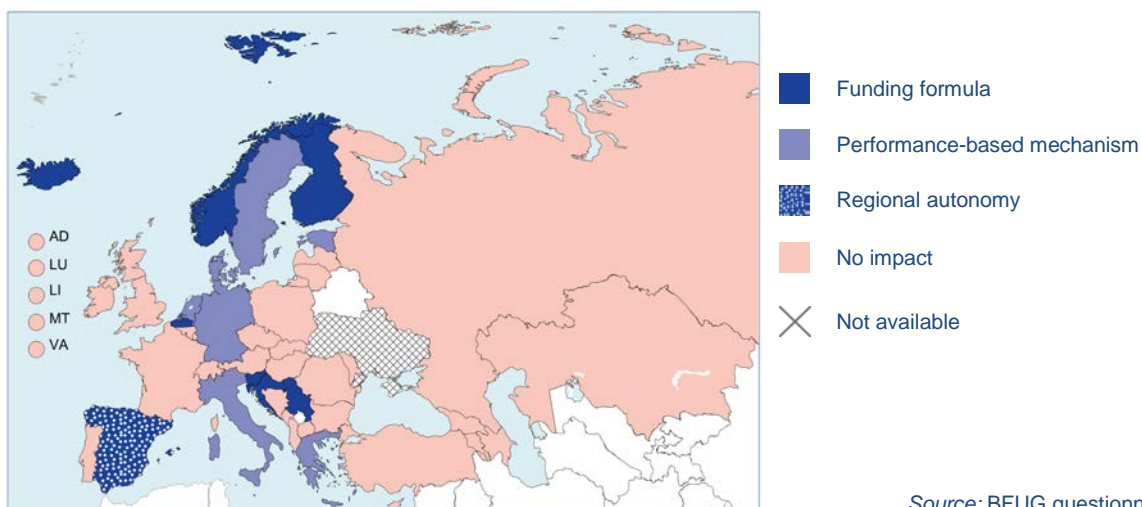
There are nine education systems of the EHEA where neither completion nor drop-out rates are calculated and monitored systematically: the Czech Republic, Greece, Hungary, Liechtenstein, Malta, Portugal, Slovakia, Slovenia and Turkey. Yet, some form of data collection (at least at the institutional level) on graduates and/or drop-outs takes place also in these countries. For example, the Czech Republic, Hungary, Portugal, Slovakia and Turkey provide data on completion rates for Eurostat (see Figure 6.2).

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, 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, 2014a), 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 presented to measure 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

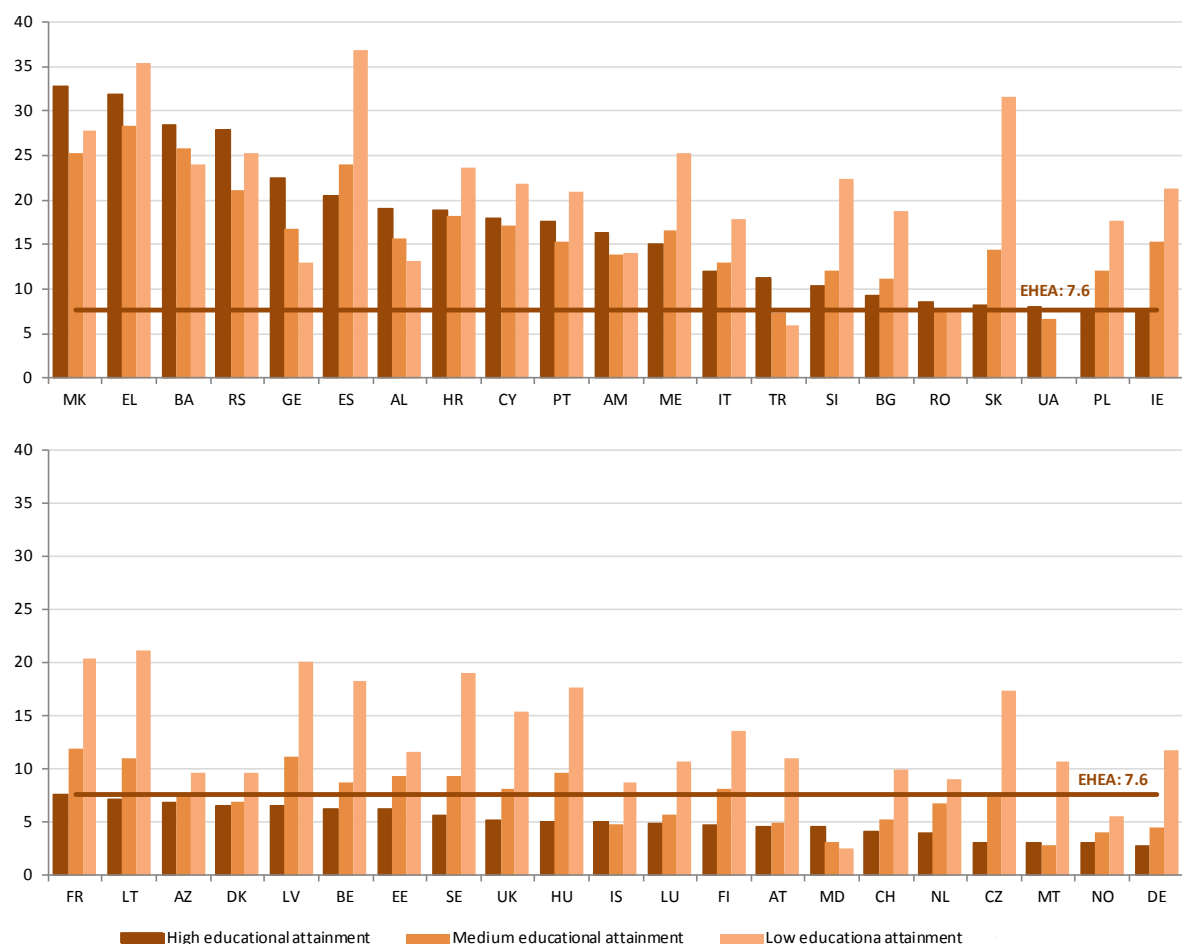
Several indicators can describe graduates' transition from education to work. Section 6.2.1 looks at graduates' labour market situation in EHEA countries based on unemployment ratios, income levels, as well as qualification mismatch. These latter two can serve as indicators for job quality (the 'meaningfulness' 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. 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.

Figure 6.14: Unemployment ratio of people aged 20-34 by educational attainment level (%), 2013

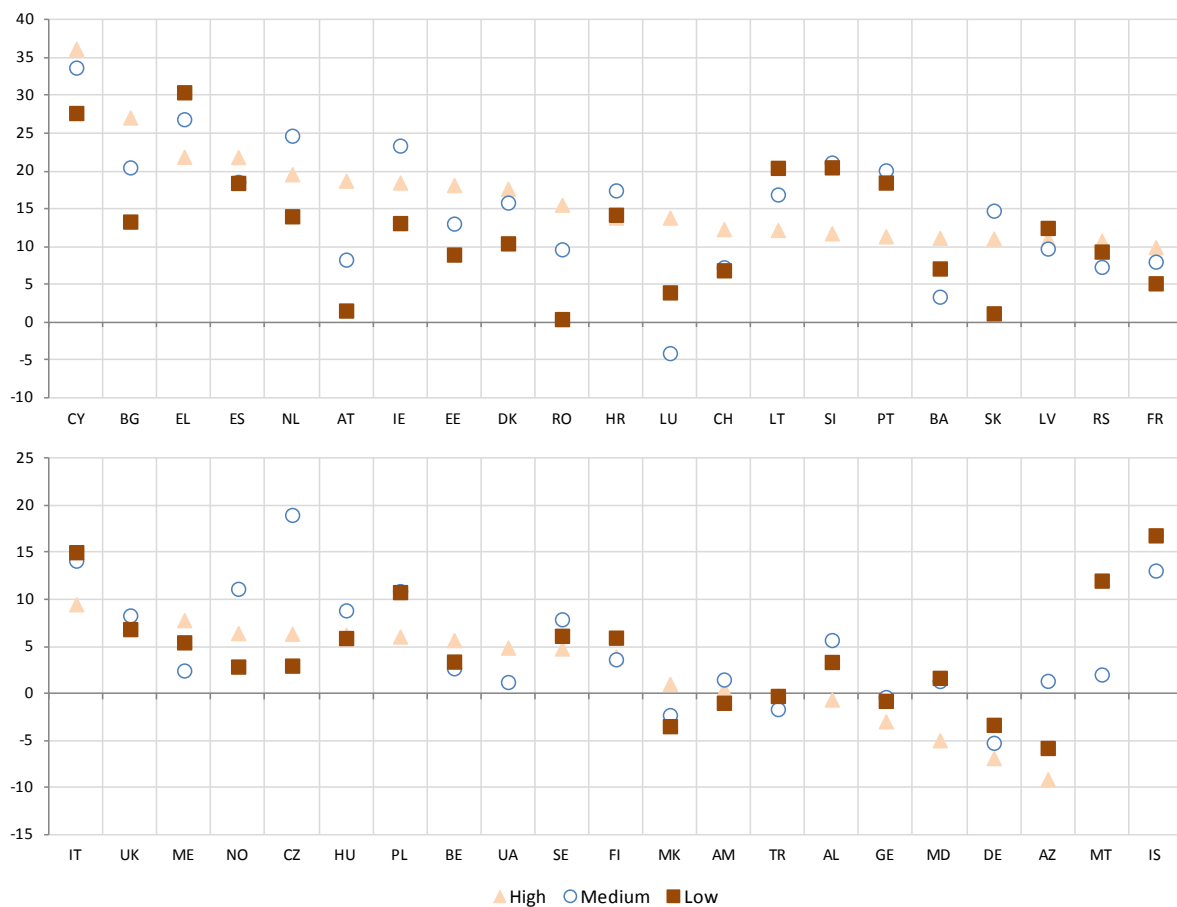


	MK	EL	BA	RS	GE	ES	AL	HR	CY	PT	AM	ME	IT	TR	SI	BG	RO	SK	UA	PL	IE
High	32.7	31.9	28.4	27.9	22.4	20.5	19.0	18.8	17.9	17.6	16.4	15.0	12.0	11.2	10.3	9.2	8.5	8.2	8.0	7.7	7.6
Medium	25.2	28.3	25.9	21.1	16.7	24.1	15.7	18.2	17.2	15.3	13.9	16.6	13.0	7.4	12.0	11.2	7.8	14.4	6.7	12.1	15.3
Low	27.9	35.4	24.0	25.2	12.9	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: 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

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. 17.4 %), 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 %).

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).

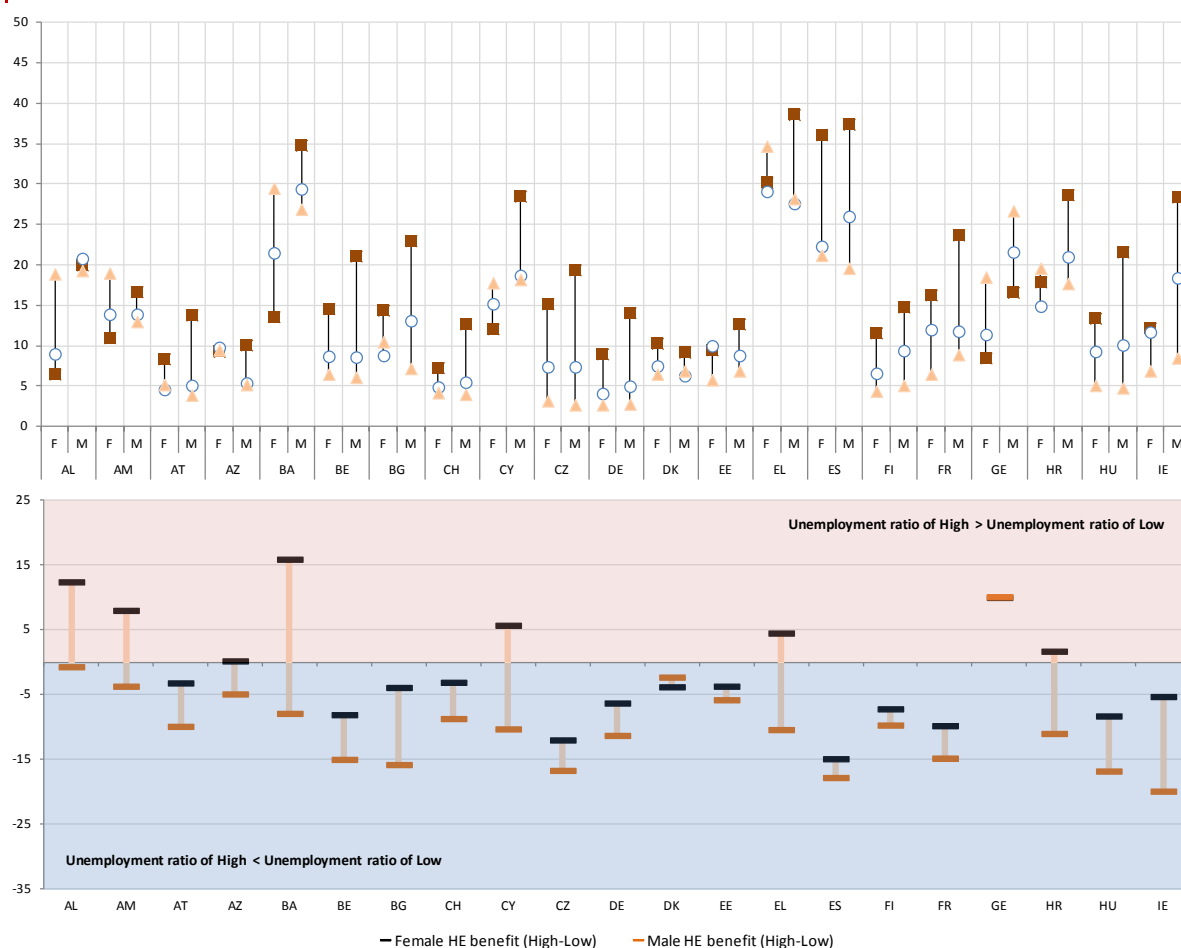
A second group of exceptions contains Greece, Bosnia and Herzegovina, Serbia, Croatia, Cyprus, Portugal and Romania. In these countries, higher education graduates face higher unemployment ratios than young people with medium levels of education, and in some cases even have the worst position in the 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.

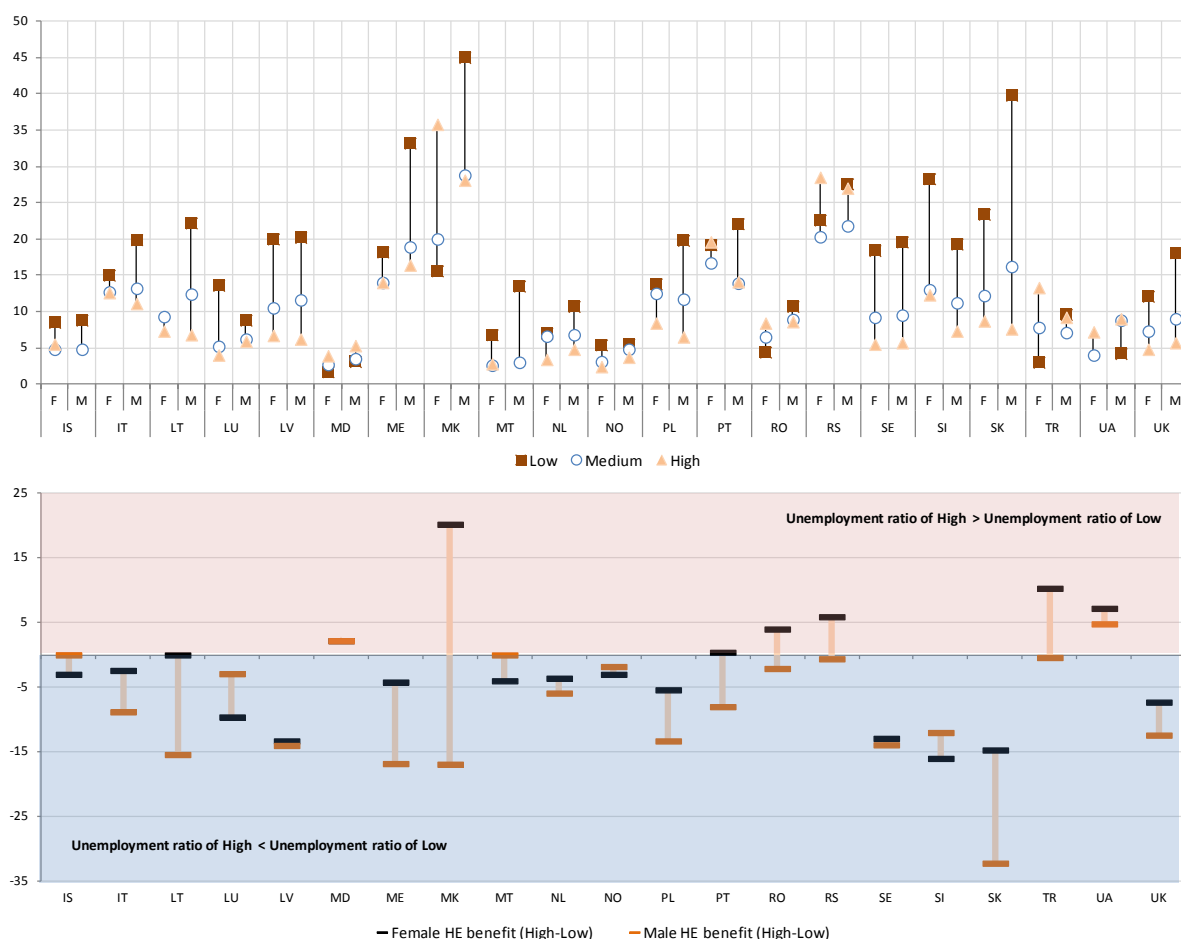
In fact, unemployment gaps between the high and the medium educated are narrowing all around the EHEA. Young tertiary education graduates have been the hardest hit by the economic crisis in comparison to their peers with medium and low educational attainment (see Figure 6.15). Between 2008 and 2013, 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, since 2008, the labour market position of the highly educated has also improved in Germany. 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: 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 female (resp. male) having completed tertiary education and the unemployment ratio of female (resp. male) having completed at most lower secondary education.
 Data are sorted by the total unemployment ratio of the highly educated.

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, 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.

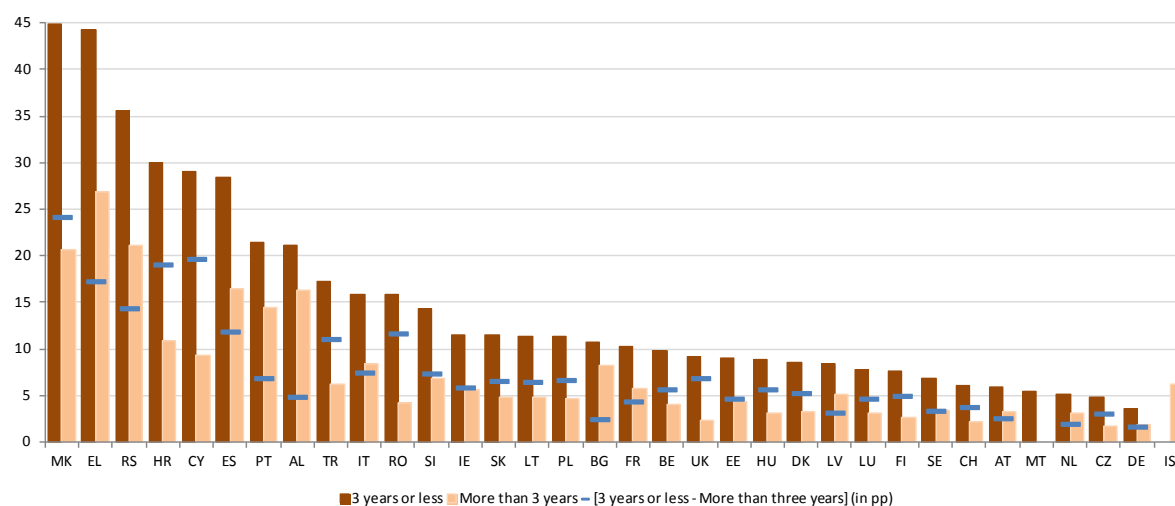
This illustrates well the impact of the crisis and how women and men have been differently affected. Labour markets are highly segmented across the EHEA: women and men – especially with lower levels of education – tend to be employed in different sectors. The economic crisis hit male-dominated sectors such as manufacturing and construction faster and more severely, so the male unemployment ratio increased faster (European Commission, 2013).

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.

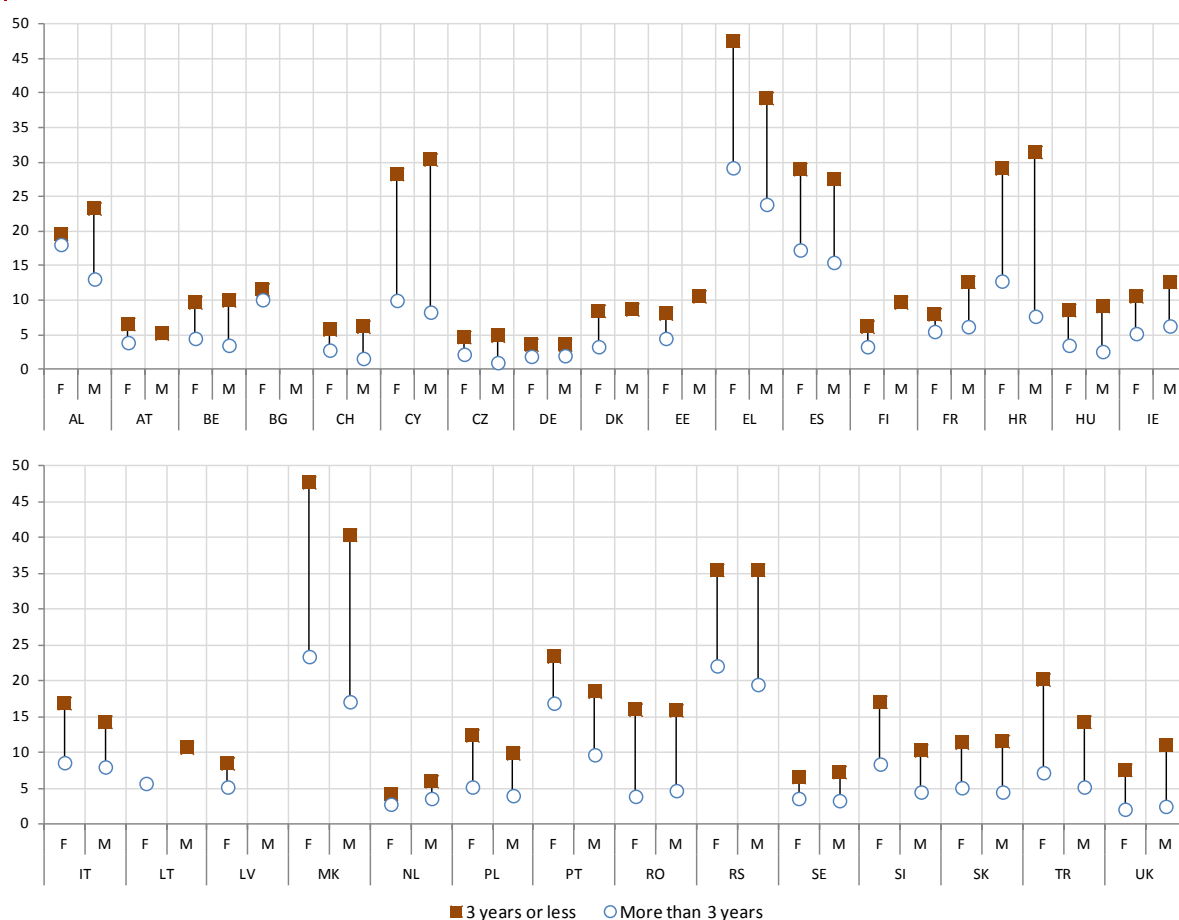
Data are sorted by the unemployment ratio of recent graduates. The median value (10.8%) refers to the unemployment ratio of recent graduates.

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 females: Greece (47.6 % of females and 39.3 % of males), "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.

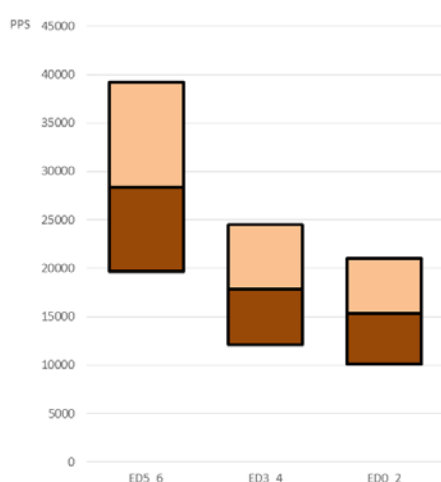
Income and educational attainment

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 the EU-28 (as no data are available for other EHEA countries) 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

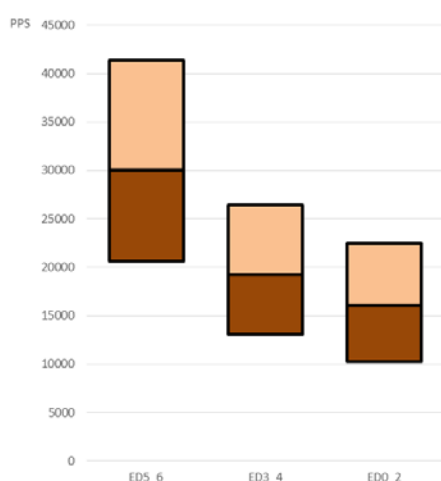
2010



	P25	P50	P75
High educational attainment (Completed tertiary education)	19 641	28 329	39 179
Medium educational attainment (Completed upper secondary education)	12 134	17 863	24 493
Low educational attainment (Completed lower secondary education)	10 090	15 330	21 008

P25/P50/P75 = Percentile 25/50/75

2013



	P25	P50	P75
High educational attainment (Completed tertiary education)	20 664	30 008	41 404
Medium educational attainment (Completed upper secondary education)	13 054	19 253	26 460
Low educational attainment (Completed lower secondary education)	10 246	16 056	22 497

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.

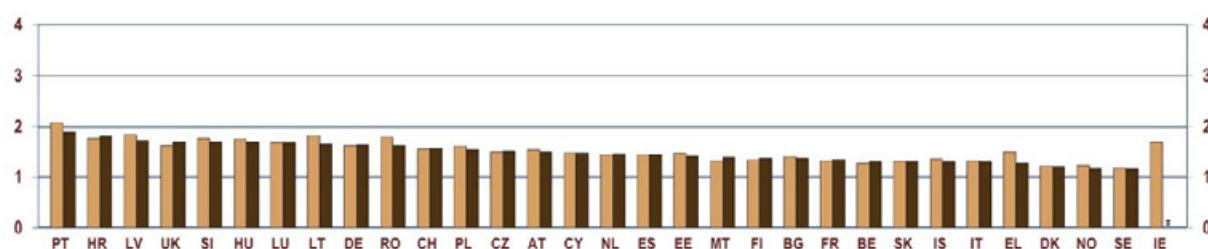
While there is much overlap in the income distributions of employees who attained lower and upper secondary educational attainment levels, the majority of employees with tertiary education tend to benefit considerably from obtaining this qualification level. Within each qualification level, the upper 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.

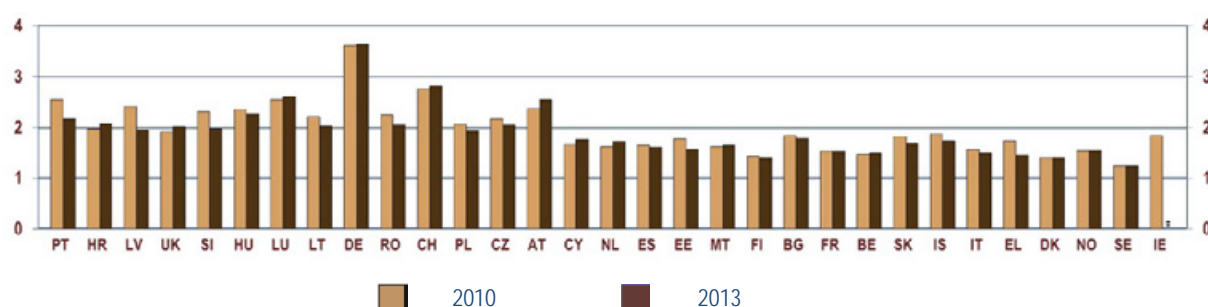
The ratio of the median annual gross income of employees with tertiary qualification to lower levels of education is depicted by country in Figure 6.20. In 2013, tertiary qualified employees in every country for which data are available had an income advantage. The ratio of tertiary qualification to 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, Norway and Denmark.

Figure 6.20: Percentage difference between median annual gross income of employees with tertiary education and 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. For details, see the Glossary and methodological notes.

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).

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 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 (see Figure 6.20).

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 of these two types of mismatches 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

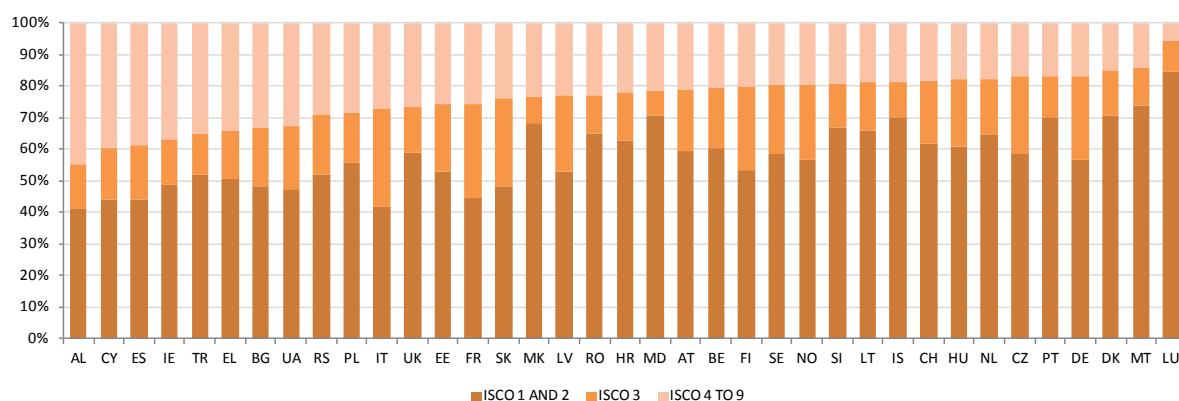
people who are both overqualified and overskilled is relatively low (around 15 % of the sample, see Flisi et al. 2014, p. 4.). A similar share of people was found to be overskilled but not overqualified, while twice as many were reported to be overqualified but not overskilled (Ibid.).

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 ⁽⁶⁾. 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 regarded as necessitating a tertiary qualification (ISCO ⁽⁷⁾ occupation level 4 to 9). 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.

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



⁽⁶⁾ 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/>.

⁽⁷⁾ International Standard Classification of Occupations; see the Glossary and methodological notes for more details.

	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.

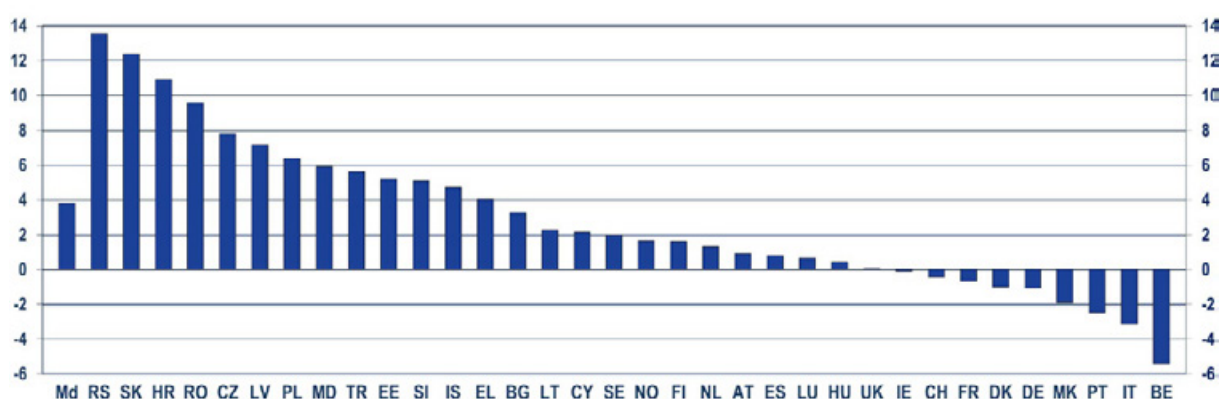
In 2013, the median over-qualification rate was 21.9 %. This means that in half of the countries, more than one fifth of young graduates were employed in occupations for which a lower qualification level should be sufficient. The countries with the highest over-qualification rates (above 30 %) were Albania (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 ⁽⁸⁾ 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 when young graduates face difficulties in finding jobs that match 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.

⁽⁸⁾ For the comparison, Albania, Malta and Ukraine were excluded from the 2013 sample (no data were available for these countries in 2010).

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



	Md	RS	SK	HR	RO	CZ	LV	PL	MD	TR	EE	SI	IS	EL	BG	LT	CY	SE
2010	18.6	15.3	11.6	11.0	13.2	9.2	15.8	21.9	15.8	29.6	20.6	14.1	13.9	30.1	30.0	16.3	37.6	17.7
2013	22.4	28.9	24.0	21.9	22.8	17.0	23.0	28.3	21.7	35.2	25.8	19.2	18.6	34.1	33.3	18.6	39.7	19.7
Change	3.8	13.6	12.4	10.9	9.6	7.8	7.2	6.4	5.9	5.6	5.2	5.1	4.7	4.0	3.3	2.3	2.1	2.0
	NO	FI	NL	AT	ES	LU	HU	UK	IE	CH	FR	DK	DE	MK	PT	IT	BE	
2010	17.8	18.4	16.5	20.4	38.0	5.1	17.5	26.5	37.0	18.7	26.2	16.1	17.8	25.5	19.4	30.4	26.2	
2013	19.5	20.0	17.8	21.3	38.8	5.7	17.9	26.6	36.9	18.3	25.6	15.1	16.7	23.6	16.9	27.3	20.8	
Change	1.7	1.6	1.3	0.9	0.8	0.6	0.4	0.1	-0.1	-0.4	-0.6	-1.0	-1.1	-1.9	-2.5	-3.1	-5.4	

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.

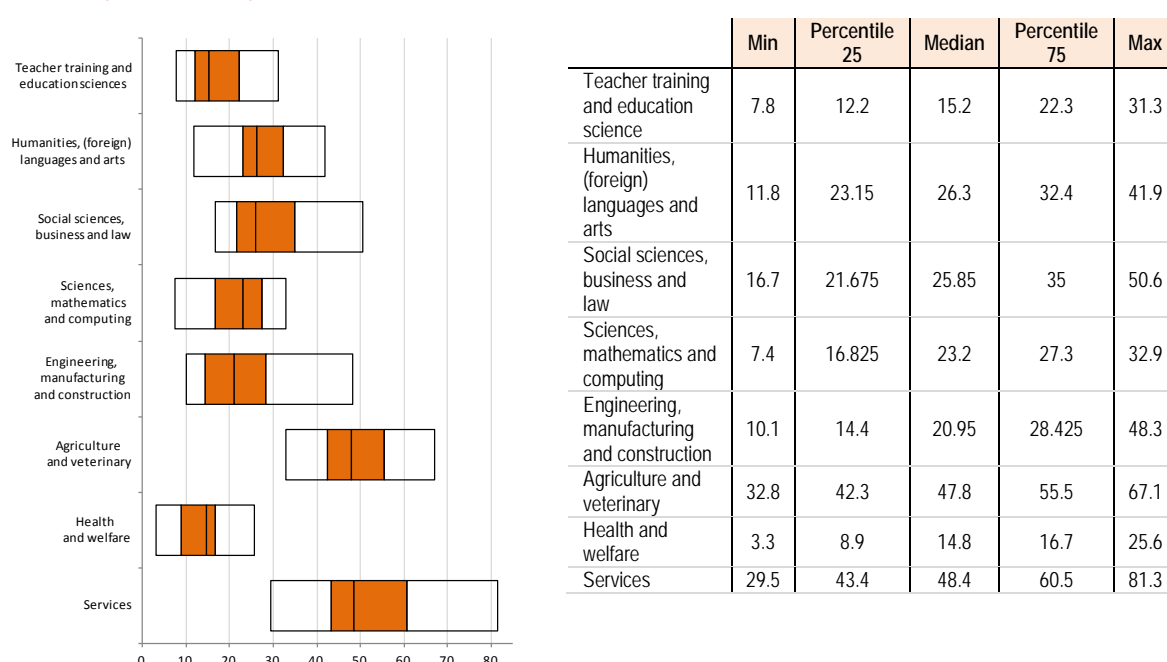
Source: Eurostat, Labour Force Survey (LFS) and additional collection for the other EHEA countries.

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, data shows that young people with a qualification in services ⁽⁹⁾ and in agriculture and veterinary ⁽¹⁰⁾ are the most likely to take up jobs 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).

⁽⁹⁾ "Services" include a wide range of occupations from restaurant and tourism to defence and military services (for more details, see the ISCED classification for fields of education, e.g. Andersson and Olsson, 1999).

⁽¹⁰⁾ 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.

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 like 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. First, highlighting the needs of the labour market focuses more on the demand-side: situations to what higher education institutions need to respond. Second, an emphasis on employable graduates 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 adapt to the needs of 21st century knowledge societies.

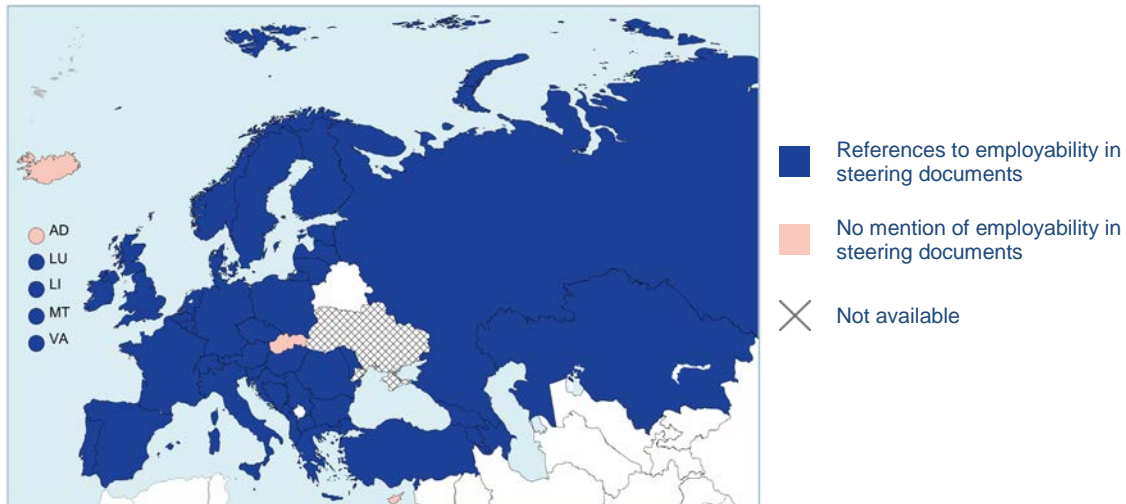
The role of educational authorities in this context is to facilitate the transformation of their higher education sector. Therefore, since this report focuses on national policy approaches, it can only present a limited picture on the on-going transformations.

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 (Figure 6.25). 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.

Figure 6.25: References to employability in steering documents, 2013/14



Source: BFUG questionnaire

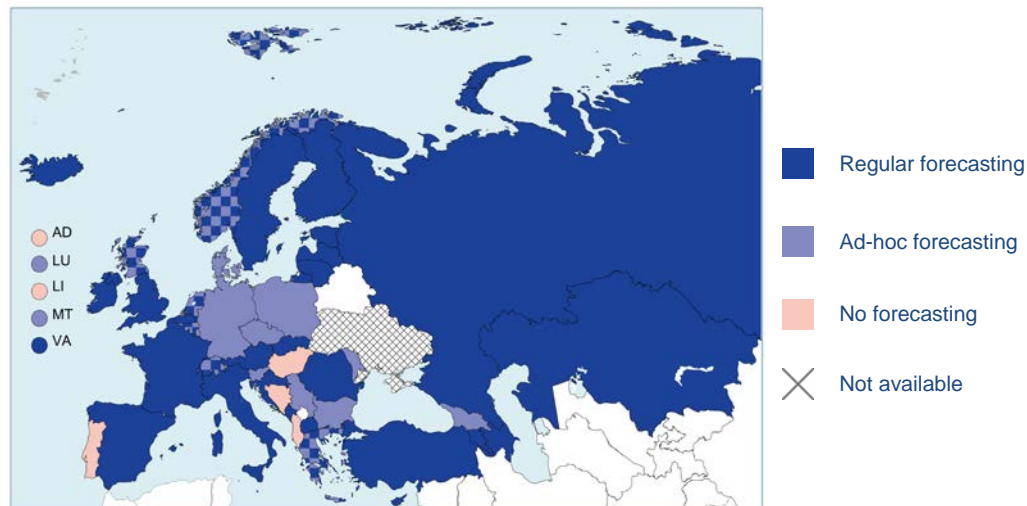
However, almost all EHEA countries aim to enhance the employability of graduates in general, without specific reference to underrepresented groups. Only in a few cases (e.g. in Estonia or Hungary) do higher education steering documents mention particular underrepresented groups in the context of employability. 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, 2014a), 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 6.26). 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.

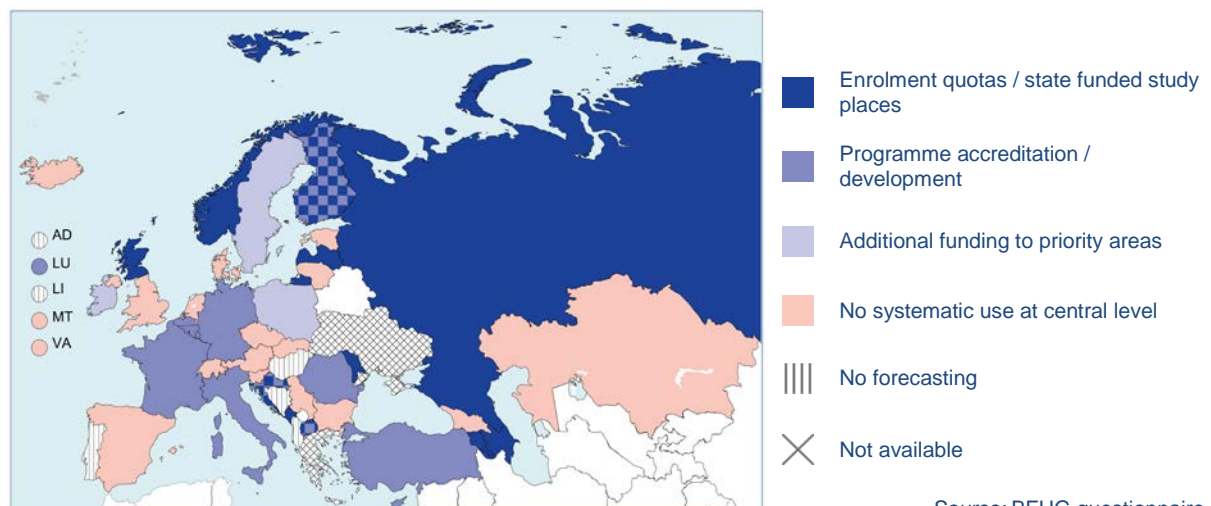
Figure 6.26: Labour-market and skills forecasting at national level, 2013/14



Source: BFUG questionnaire

Most countries conducting labour market forecasts make efforts to take their results into account in higher education planning at central level (see Figure 6.27). 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 6.27: Using labour-market and skills forecasting in central planning, 2013/14



Source: BFUG questionnaire

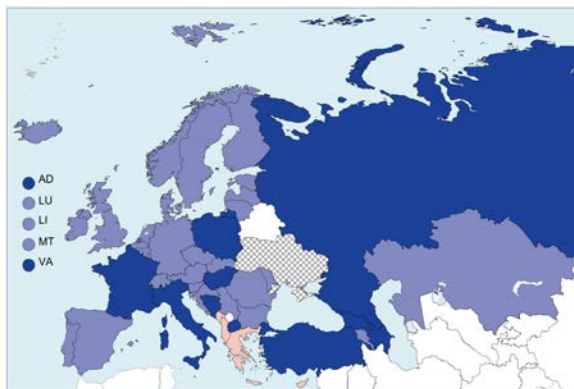
Cooperation between employers and higher education institutions

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⁽¹¹⁾, and higher education institutions can use this knowledge when designing degree programmes.

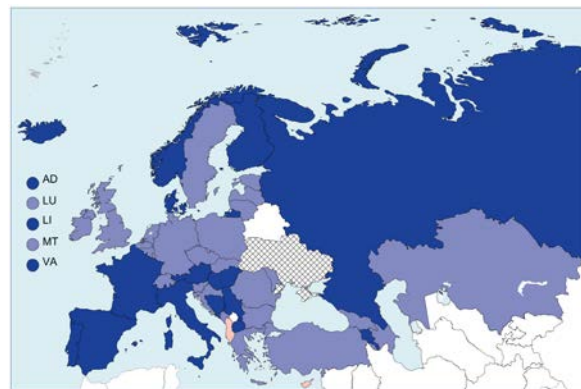
Looking at the most important areas in which employers can be involved in higher education (curriculum development and participation in higher education institutions' decision-making bodies), it appears that employers do participate in higher education planning and governance across the EHEA. A common 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. Such participation is analysed in Chapter 3 in more detail.

Figure 6.28: Involvement of employers in higher education planning and management, 2013/14

A. Curriculum development



B. Higher education institutions' decision-making bodies



■ Compulsory involvement ■ Possible involvement □ No involvement ✕ Not available

Source: BFUG questionnaire

However, the extent of employers' participation differs across the EHEA. Regarding curriculum development, 12 countries make it compulsory for employers to participate in the design or revision of curricula (see Figure 6.28.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

⁽¹¹⁾ On the relative importance of professional and various generic skills for employers, see for example Humburg, van der Velden and Verhagen, 2013.

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 6.28.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 6.29 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 6.29: 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.

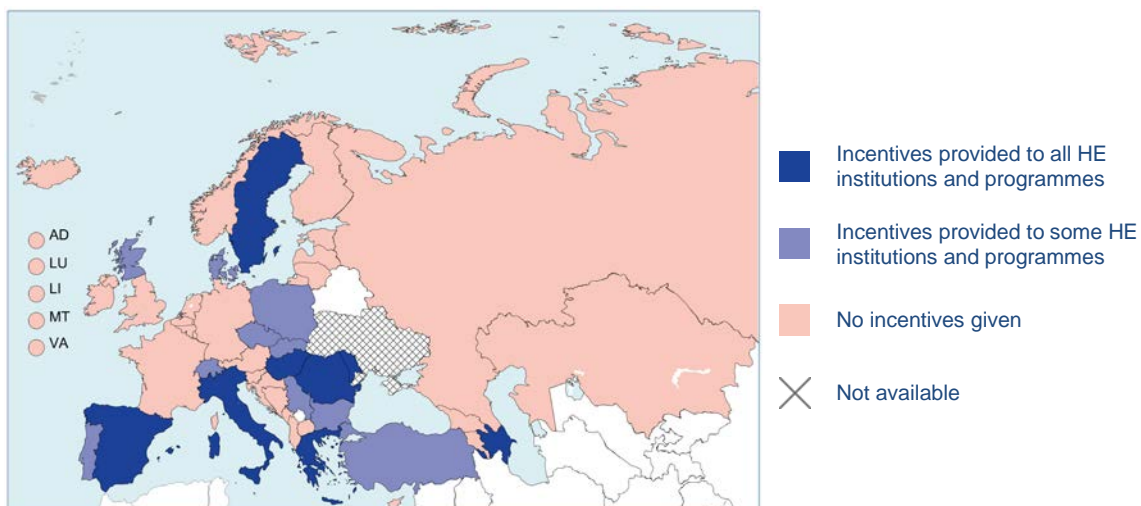
In the European Union (EU), Directive 2005/36/EC on the recognition of professional qualifications ⁽¹²⁾ regulates embedding practical training into certain, professionally oriented study programmes (e.g. for medical or pharmaceutical studies). Many non-EU member countries also apply similar regulations 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 ⁽¹³⁾. 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 6.30). 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).

Figure 6.30: Incentives given to institutions for work placements, 2013/14



Source: BFUG questionnaire

⁽¹²⁾ 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.

⁽¹³⁾ Adopted in October 2014.

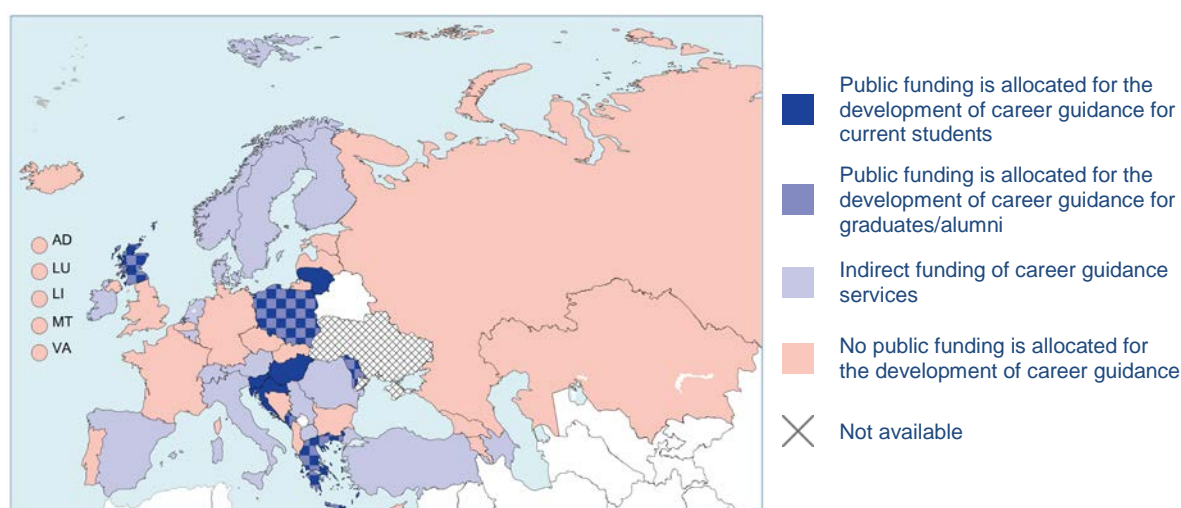
In addition to obliging or encouraging higher education institutions to include such shorter work placements in study programmes, several countries established so-called 'dual' degrees that combine theoretical studies in higher education institutions with professional experience gained at work. In this 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 6.31). 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 6.31).

Figure 6.31: Allocation of public funding to develop career guidance services in higher education institutions, 2013/14



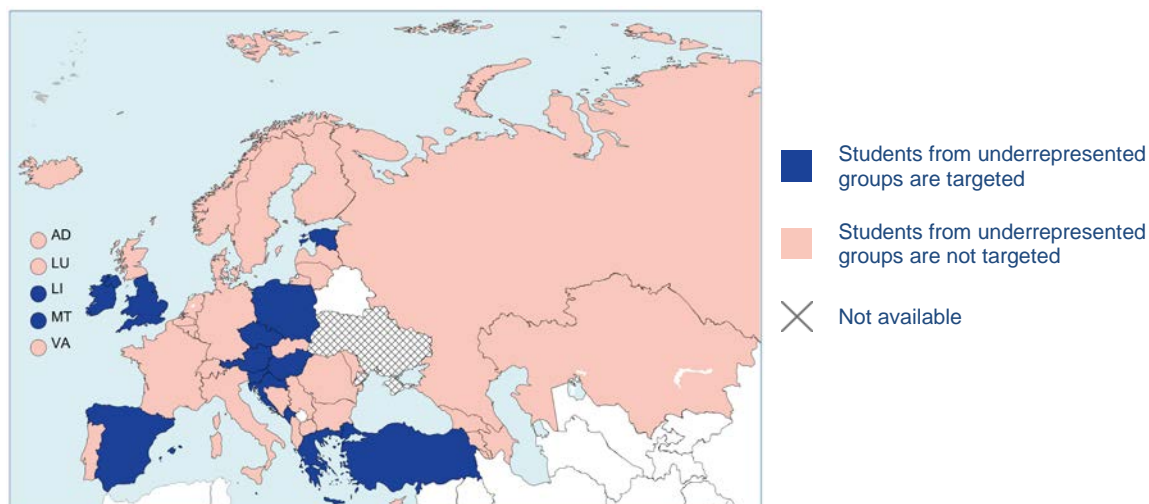
Source: BFUG questionnaire

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 fifteen education systems reported having targeted career guidance services in higher education institutions (Figure 6.32). 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 6.32: Targeted career guidance services for students from underrepresented groups, 2013/14



Source: BFUG questionnaire

Monitoring and evaluation

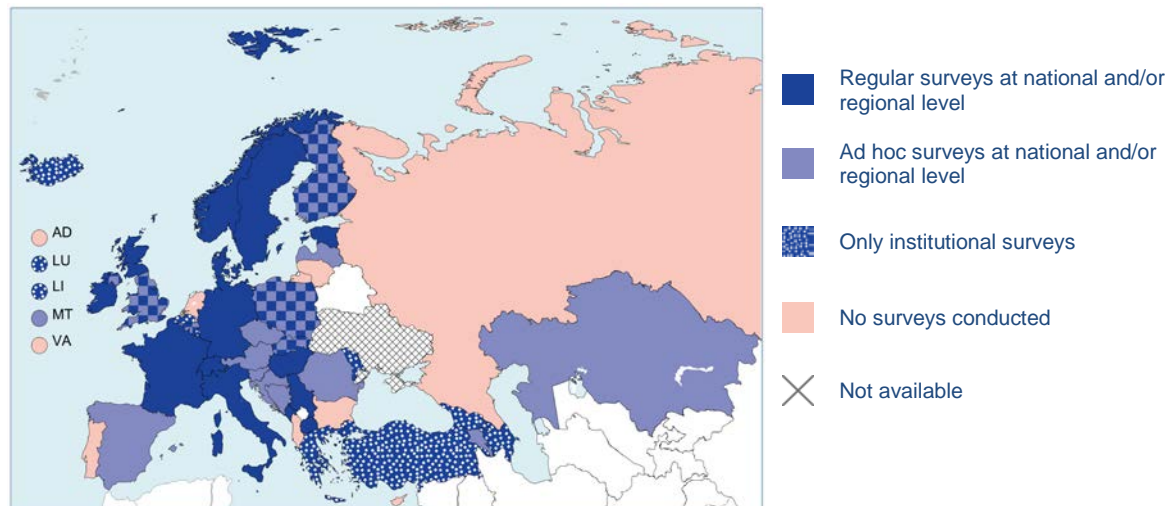
Higher education institutions' employability performance is often subject to external evaluation. The most common evaluation process is external quality assurance, where the employability of graduates is one of many criteria. More information on quality assurance can be found in Chapter 3. In addition, several countries have established procedures of evaluating how well higher education institutions perform in 'producing' employable graduates.

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 6.33). 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.

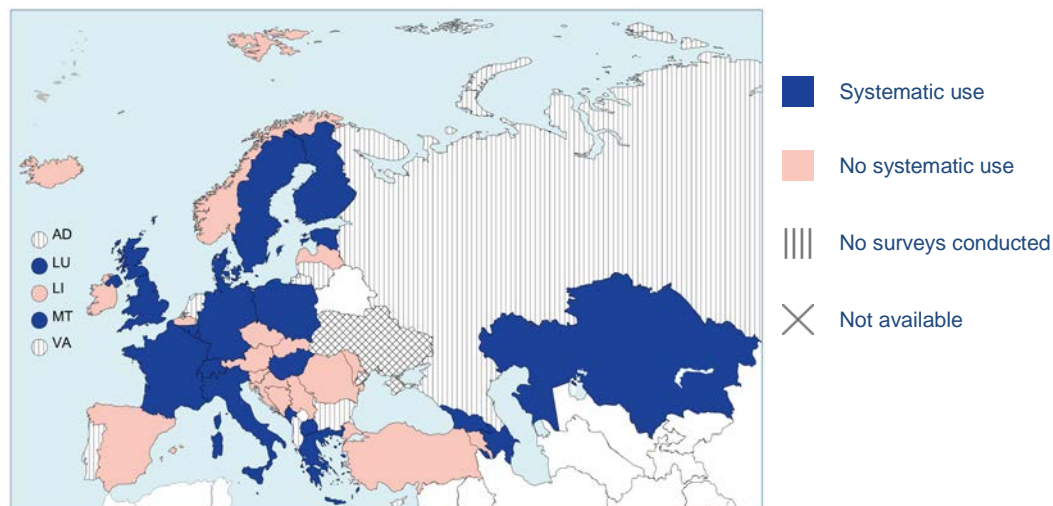
Figure 6.33: Graduate tracking surveys, 2013/14



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 6.34). 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 6.34: Systematic use of graduate tracking surveys in planning, 2013/14



Source: BFUG questionnaire

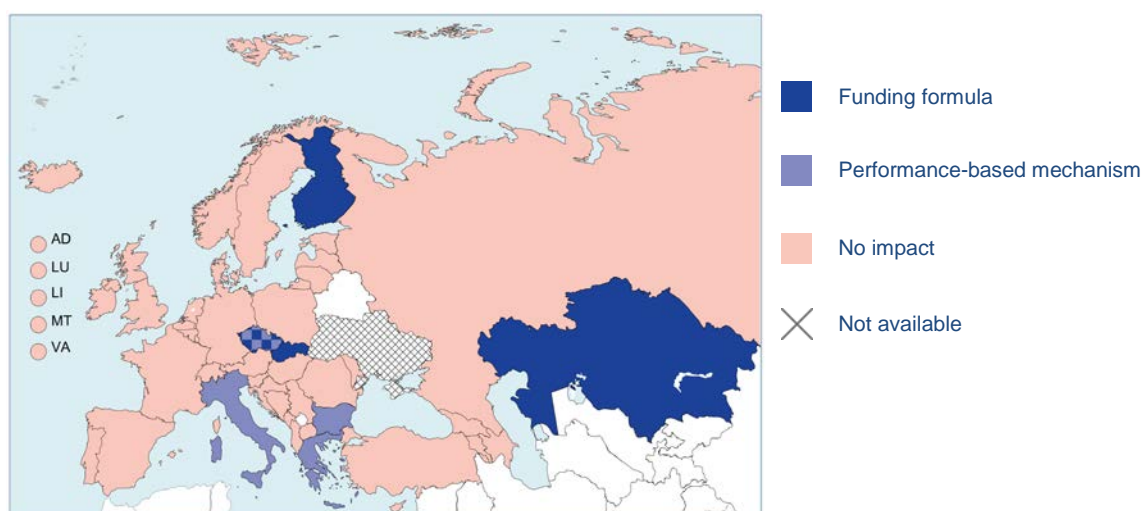
While quality assurance is the most common evaluation mechanism in the EHEA, some countries have established other procedures through which the employability performance of higher education institutions can be assessed. One prominent goal of setting up such evaluation processes is to make employability-related 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 6.35). 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 6.35: 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, less than 69 % of higher education entrants complete higher education in half of the EHEA countries with available data.

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.

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, and monitoring performance with established feedback-mechanisms) 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.

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7. INTERNATIONALISATION AND MOBILITY

The Bucharest Communiqué

International mobility of student and staff has always been a high priority in the Bologna agenda. The 2012 Ministerial Conference in Bucharest showed that this topic still commands great attention by adopting a Mobility Strategy for the EHEA as an addendum to the Bucharest Communiqué ⁽¹⁾. This Strategy, while reaffirming the mobility target formulated at Leuven/Louvain-la-Neuve in 2009 ⁽²⁾, outlined key actions required by the EHEA countries to pave the way for more high quality mobility exchanges and fewer obstacles across the continent.

While the main focus has always been put on mobility and its "global dimension", Ministers raised awareness about a broader priority of the European higher education policy agenda in introducing the term "internationalisation" in the Bucharest Communiqué. Internationalisation of higher education has now entered the EHEA discussions and its various aspects pose challenges for policy-makers.

The Bucharest Communiqué referred to several components of internationalisation. Regarding mobility, it stressed the importance of sufficient and portable support to mobile students and better balanced mobility in the EHEA. Higher education institutions were encouraged to further develop joint programmes and degrees and countries committed to examine national rules and practices with a view to dismantling obstacles to international cooperation and mobility. The importance of fair academic and professional recognition, including recognition of non-formal and informal learning, was also underlined in the Communiqué, as it contributes directly to mobility and, thus, 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, considered as a main tool of internationalisation ⁽³⁾. It revealed preliminary findings for student mobility flows, as the collection of statistical data was still in a developmental stage. It addressed the question of balanced and imbalanced 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 these obstacles. It also showed that monitoring mechanisms were largely absent across the EHEA.

Regarding staff mobility, the 2012 Report stressed the need to agree on scope and definition(s), and to set quantitative targets for the forms of staff mobility that are desired. It concluded that better monitoring and tackling obstacles that hinder staff mobility were essential proposals to put forward if countries were to foster staff mobility across Europe.

BFUG Working Group on Mobility and Internationalisation

Between 2012 and 2015, the BFUG Working Group on Mobility and Internationalisation has worked on topics that needed to be further discussed and developed at policy level across the EHEA. Significant progress has been made on critical issues such as staff mobility, quality in mobility as well as the

(1) EHEA, 2012. *Mobility for Better Learning – Mobility strategy 2020 for the European Higher Education Area*. [Online] Available at: [http://www.ehea.info/Uploads/\(1\)/2012_%20EHEA_%20Mobility_%20Strategy.pdf](http://www.ehea.info/Uploads/(1)/2012_%20EHEA_%20Mobility_%20Strategy.pdf) [Accessed 15 October 2014].

(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.

(3) EHEA, 2012. *The European Higher Education Area in 2012: Bologna Process Implementation Report*, p. 151.

portability of financial support for mobile students. The working process has led to some proposals (recommendations, guidelines) that are likely to be adopted by ministers at the Yerevan Bologna Conference. Moreover, the Working Group also had the mandate to contribute to the evaluation of the EHEA Strategy "European Higher Education in a Global Setting" ⁽⁴⁾, adopted in response to the growing interest in other parts of the world with regard to the Bologna reforms. The purpose of the exercise was to assess developments under the five priority areas ⁽⁵⁾ of the strategy at various level – national, institutional and European – since its adoption in 2007.

Chapter outline

In the light of the available data, this chapter aims to report on the progress made since 2012 regarding the process of higher education internationalisation. It aims to provide an idea of where the EHEA countries stand within the process and to highlight some elements where further developments are necessary. The first section focuses on the engagement of EHEA countries with the internationalisation of higher education. It brings new information as it looks at national strategies and steering documents, stakeholder participation in internationalisation, budget and incentives for internationalisation, as well as institutional strategies and internationalisation instruments. It also presents the main regions of cooperation for particular internationalisation activities.

The second section addresses mobility issues. Firstly, it looks at student mobility, providing analysis on student mobility flows, examining the question of 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 target issues and also reporting on obstacles and measures to tackle these obstacles.

⁽⁴⁾ EHEA, 2007, *European Higher Education in a Global Setting. A strategy for the External Dimension of the Bologna Process*, [Online] Available at: <http://www.ehea.info/Uploads/Documents/Strategy-for-EHEA-in-global-setting.pdf>. [Accessed 15 October 2014].

⁽⁵⁾ 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. Engagement with internationalisation

Understanding Internationalisation and Mobility

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 ⁽⁶⁾. 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 postsecondary education" ⁽⁷⁾. Internationalisation has thus become a "many-faceted phenomenon" ⁽⁸⁾ and now entails various forms of activities. Among them, international mobility (mostly student mobility) is still probably the most visible one.

It is now generally acknowledged that internationalisation offers benefits to students, staff, higher education institutions and countries. This 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 of course differ from the perceptions of higher education institutions themselves.

7.1.1. Engagement at national level

In adopting national strategies or by including objectives and concrete measures in their steering documents, countries provide guidance for the internationalisation of their higher education system and institutions. This guidance is crucial when many stakeholders are taking part in the internationalisation process and where inconsistent actions or initiatives are likely to happen. The main challenge for national policy-makers is to find the right balance between providing sufficient guidance and respecting the autonomy of higher education institutions.

7.1.1.1. National strategies for internationalisation

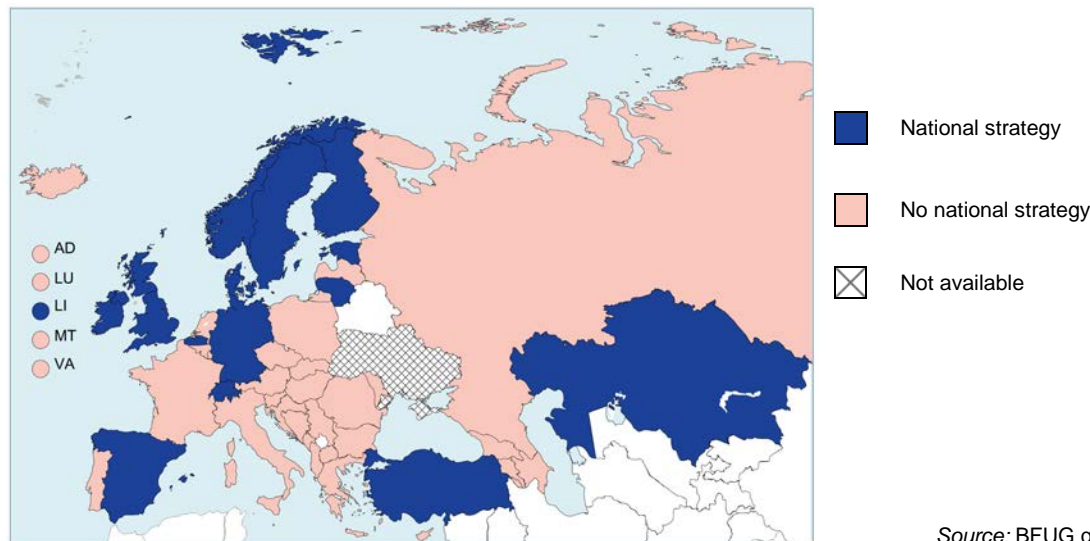
Until recently, having a formal national strategy for internationalisation of higher education has not been a top priority for the majority of EHEA countries. Indeed, the BFUG reporting data show that less than half of the EHEA countries have adopted a formal national strategy for internationalisation of higher education (see Figure 7.1). However, while countries with a formal strategy are currently in the minority, a few years ago there were no such strategies, and developments are therefore currently taking place within a dynamic of rapid change.

⁽⁶⁾ Bernd WÄCHTER (ACA), 2008. *Mobility and internationalisation in the European Higher Education Area in BEYOND 2010 – Priorities and challenges for higher education in the next decade*. [Online] Available at http://www.lemmens.de/fileadmin/user_upload/Verlag/Buecher/ACA_Download_PDFs/2008_Beyond_2010_%E2%80%93_Priorities_and_challenges_for_higher_education_in_the_next_decade.pdf#page=15 [Accessed 7 November 2014], p.13-14.

⁽⁷⁾ Jane KNIGHT, 2003. *Updating the Definition of Internationalization in International Higher Education*, Fall 2003. [Online] Available at http://www.bc.edu/content/dam/files/research_sites/cihe/pdf/IHEpdfs/ihe33.pdf [Accessed 7 November 2014], p.2.

⁽⁸⁾ Bernd WÄCHTER, *op. cit.*, p. 13.

Figure 7.1: Countries that have adopted a formal national strategy for internationalisation of higher education, 2013/14



Source: BFUG questionnaire

It should be underlined that the concept, "national strategy" is broad, and this may lead to difficulties in comparing country realities. Indeed, countries' national strategies for internationalisation are very diverse. In some countries, the strategy can be found in a self-contained document, while in others it is part of a global national higher education strategy. Strategies can also be very general, or they may focus on specific topics. Similarly, some outline general objectives whereas others list very concrete measures in order to implement internationalisation objectives.

One striking national example is the adoption by the Federal Government and the *Länder* in Germany of a common internationalisation strategy in April 2013. 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. The national strategy of Belgium (Flemish Community) differs significantly to this model, as it has been developed as an action plan and focuses exclusively on mobility issues, while 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 Strategy for Higher Education ⁽⁹⁾. It addresses several significant issues such as the legal environment that supports internationalisation (quality assurance, migration policy, recognition of qualifications), student mobility, the share of international academic staff and the internationalisation of study programmes. It plans to develop monitoring activities, but the entire strategy has not yet been assessed. In fact, among the countries that have adopted a national strategy, only four - Finland, Ireland, Lithuania and the United Kingdom (Scotland) - have undertaken any evaluation. These 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).

It is worth underlining that some countries were expecting to adopt a national strategy by the end of 2014 and that some others are currently developing their internationalisation strategy. It might be

⁽⁹⁾ Since the beginning of year 2014 came into force Estonian Lifelong Learning Strategy 2020 and internalisation of higher education is also included in this strategy.

interesting to see to what extent the 2013 European higher education in the world Strategy ⁽¹⁰⁾, which encourages member states to develop “comprehensive internationalisation strategies”, will have an impact on EU and non EU countries on this matter.

7.1.1.2. National steering documents

Although few countries have developed clear internationalisation strategies, it is nevertheless common to find reference to internationalisation in steering documents. Based on information from reporting countries, the more common aims or objectives mentioned in steering 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 collaborations are also important aims for many countries.

In order to achieve these objectives and carry on the internationalisation process, EHEA member states propose a wide range of concrete measures in their steering documents. For example, in order to attract more foreign students, a certain number of countries have adopted measures aiming at improving existing or developing new information channels (mainly websites) about their programmes or their higher education institutions/systems. Among them, 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 fairs and collaboration with embassies as other channels to promote Czech higher education abroad. The government of Denmark, in 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 to attract skilled international students. Moreover, it proposes several concrete initiatives to ease the international graduates' transition to the Danish labour market, notably with regard to international master and Ph.D. students. Some countries also reported on the provision of courses or study programmes in foreign languages as a means of recruiting foreign students.

In order to encourage mobility of their national students several countries highlight the importance of providing more and better information/advice to students who would be interested in undertaking a part of their studies abroad. Other countries stimulate student mobility through the promotion of international work placements or the provision of study programmes that include a mobility window ⁽¹¹⁾.

Many other significant measures are mentioned to foster mobility, such as promoting the learning of languages, improving recognition procedures, ensuring the portability of loans and grants, including social dimension objectives in financial support for mobility ⁽¹²⁾ or simplifying visa procedures for students. The use of Bologna tools such as the Diploma Supplement or the ECTS credit system as well as taking part in European programmes (e.g. Erasmus +, Erasmus Mundus) are also cited as measures to foster mobility.

⁽¹⁰⁾ European Commission, 2013. *European higher education in the world*. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. [Online] Available at: <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52013DC0499&from=EN> [Accessed 23 October 2014].

⁽¹¹⁾ A mobility window is defined as period of time reserved for international student mobility that is embedded into the curriculum of a study programme. See Irina FERENCZ, Kristina HAUSCHILDT and Irma GARAM (eds.) (ACA), 2013. *Mobility Window: From Concept to Practice*. [Online] Available at http://www.aca-secretariat.be/fileadmin/aca_docs/images/members/ACA_2013_Mobility_windows.pdf [Accessed 20 November 2014], p.34.

⁽¹²⁾ 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.

Some countries also mention measures to increase the recruitment of international staff. For instance, the Slovenian government aims to introduce supplementary support mechanisms for foreign experts such as assistance with child care or accommodation. Regarding the international cooperation between higher education institutions within and beyond the EHEA, a certain number of countries have adopted measures in order to facilitate the development of joint programmes/degrees, summer schools or other types of collaborations (e.g. joint research projects). For example, in Italy, the requirements that higher education institutions have to fulfil to open a joint programme or international programmes have been made less restrictive.

The scope and variety of national measures show the many facets of the internationalisation process in higher education. When designing national strategies or sharing responsibilities among different stakeholders, it is important to bear this complexity in mind.

7.1.1.3. Stakeholders involved in the internationalisation process

The accelerating rate of the internationalisation process forces national authorities to adapt their structures and to share responsibilities with stakeholders.

In the majority of countries, ministries (education, higher education, foreign affairs, research, economic development, etc.) are involved in the internationalisation of higher education. In some cases, national public agencies have been created and are playing a major role in the internationalisation of the higher education system. The most well-known examples are the German Academic Exchange Service (DAAD) in Germany, Nuffic in the Netherlands and the Centre for International Cooperation in Higher Education (SIU) in Norway.

The DAAD in Germany is the largest agency focusing on the internationalisation of higher education in Europe – and also in the world. It offers programmes and funding for 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. In the Netherlands, the Nuffic Agency works to promote international cooperation in higher education and support mobility, but deals also with diploma and professional recognition. The Norwegian SIU, established as an administrative agency under the Norwegian Ministry of Education and Research, aims to promote and facilitate cooperation and mobility, coordinate international programmes, promote cooperation between higher education institutions, create a knowledge base and analyse results and the impact of internationalisation.

There are also a number of recent developments in other countries. Indeed, Belgium (French Community), France and Estonia are among the countries that have relatively recently established national public agencies. The Wallonia-Brussels Campus, in Belgium (French Community), was established in 2010 by the ministry for higher education and Wallonia-Brussels International. Campus France, also established in 2010, is supervised by the ministry for foreign affairs and the ministry responsible for higher education and research. It comprises more than 200 Campus France centres and platforms abroad that promote French higher education and provide guidance to potential international students. In Estonia, the Archimedes Foundation was established in 2011 by the Estonian government as an implementing agency for the Ministry of Education and Research¹³.

Such agencies (or even other stakeholders), while raising the visibility of their national institutions and education system, could also, to a certain extent, raise 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. Work could

¹³ Estonia: Could you please confirm?

be done in this area to support certain EHEA countries that do not yet have national promotion infrastructure or resources. The topic could also be tackled within the eventual revision of the "European Higher Education in a Global Setting" strategy.

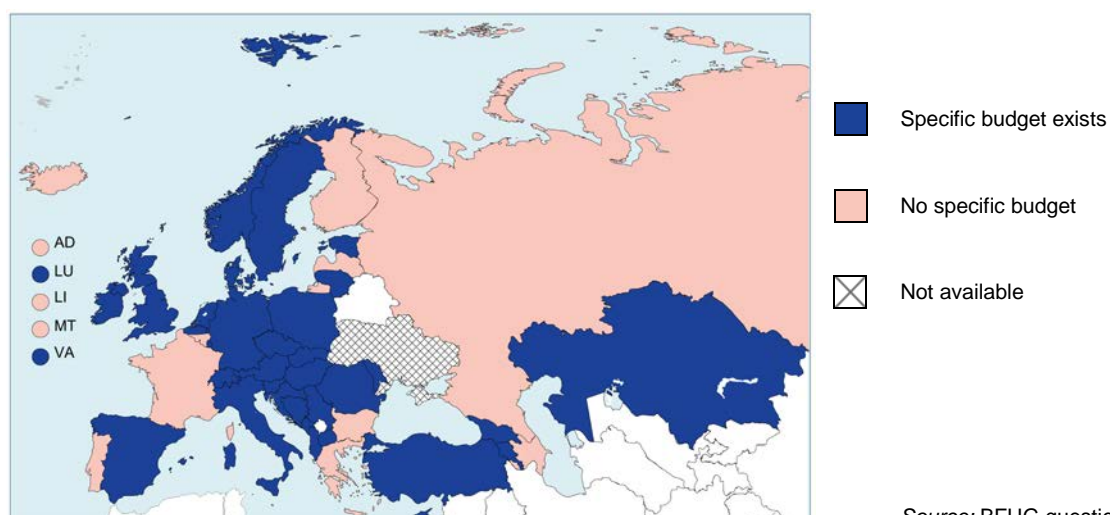
In addition to national agencies, other national stakeholder organisations can play a role in the internationalisation of higher education, the most common being the national higher education associations or Rectors Conferences. Some countries have specific intermediary organisations to support higher education institutions in their internationalisation activities. For 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) shows an interesting example of an alternative model to the national agency, in combining existing bodies when working on internationalisation (enterprise agencies, funding council, NGOs and the umbrella body for Scottish universities).

In conclusion, there is a tendency for some countries to develop publically funded agencies to support internationalisation. This can sometimes result in a mix of different agencies with different purposes enjoying different relations to the higher education institutions. Countries are taking actions in adapting their structures and in establishing new bodies, or in using existent organisations. Things are evolving in an interactive manner with considerable national differentiation.

7.1.1.4. Budget and incentives for internationalisation

Around two thirds of countries report having a specific budget for funding internationalisation activities in higher education (see Figure 7.2). However, it should be underlined that funding is mostly provided for mobility activities. 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 7.0 M€ by 2019-2020. In the Czech Republic, a special budgetary item, Indicator D - International Cooperation, comprises roughly 2 % of the budget for all educational activities. In Denmark, part of the state funding for higher education institutions is allocated on the basis of the number of international exchange students, as well as Danish exchange students going abroad. In Italy the dedicated budget for internationalisation activities includes 12M€ for outgoing credit mobility, 5M€ for outgoing credit mobility for placements abroad, 1,5M€ for joint programmes and for international students. The multiannual strategic planning allocates further resources (up to 13M€) to internationalisation and mobility.

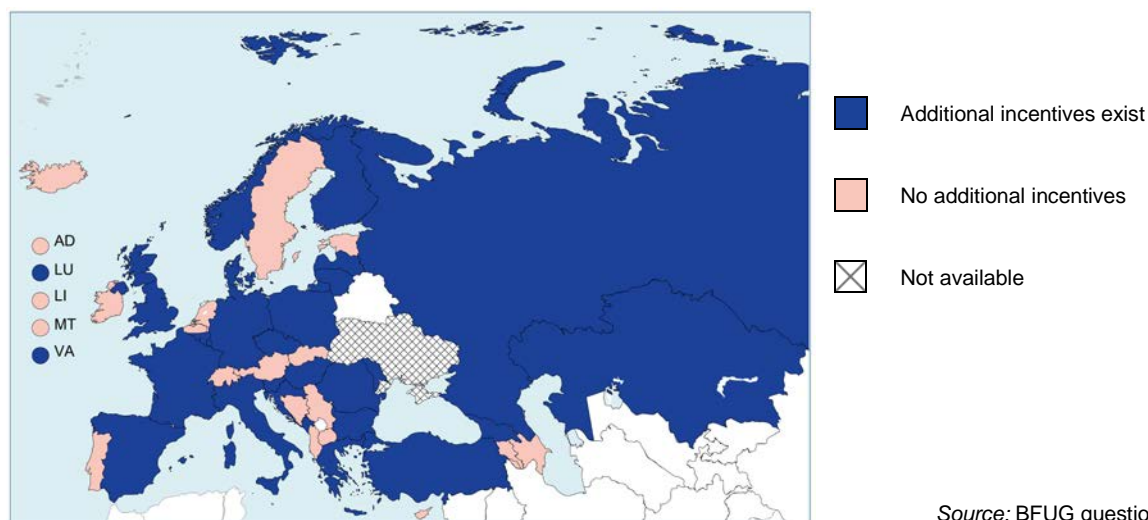
Figure 7.2: Specific budget for internationalisation activities in higher education, 2013/14



Other incentives

Around half of the countries provide other kinds of incentives for higher education institutions to engage in internationalisation activities (see Figure 7.3). A number of countries refer to internationalisation as one of the areas specified in the performance and funding contracts between the higher education institutions and the government. The role of EU funded mobility programmes is also stressed. These programmes represent important incentives, especially in non-EU countries like Moldova, Georgia and Turkey. Lithuania and Slovenia mention projects funded by the EU Structural funds which in their case include co-financing for internationalisation activities.

Figure 7.3: Other incentives for higher education institutions to engage in internationalisation activities, 2013/14



Source: BFUG questionnaire

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. This entitles them to additional funding. Additional measures have also been envisaged by the Operational Programme Efficient Human Resources for 2014-2020.

In Finland, a higher level of internationalisation is rewarded through the funding model. Student mobility and the number of foreign staff at universities are examples of criteria that trigger additional resources. In the framework of national initiatives to support mobility and internationalisation, funding for higher education institutions is also allocated through various instruments by the Centre for International Mobility (CIMO) as well as other actors.

In Luxembourg, the engagement in internationalisation activities is mandatory for higher education institutions. This obligation is specified in the contract between the university and the government and funding depends on compliance with the contract.

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 to calculate the annual amount of funding for teaching.

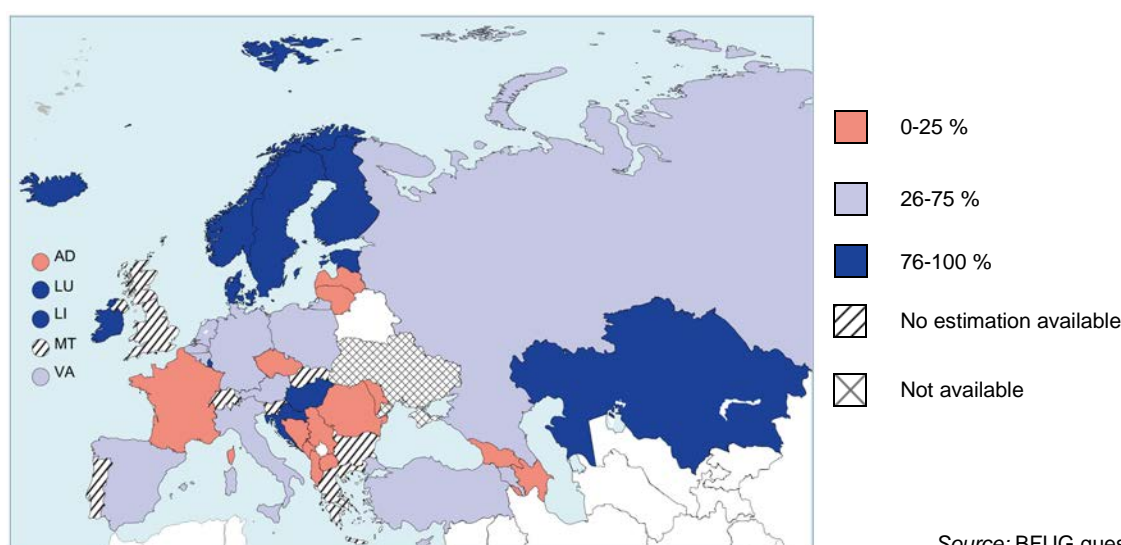
7.1.2. Engagement at institutional level

Higher education institutions have a great role to play in the process of internationalisation. They are encouraged to adopt internationalisation strategies that fit their individual profile and interests and they can also use a range of instruments to encourage mobility and cross-border cooperation. The use of these instruments, however, depends greatly on available resources.

7.1.2.1. Institutional internationalisation strategies

For the reporting exercise, countries were asked to give an estimate of their higher education institutions that have adopted an internationalisation strategy (see Figure 7.4).

Figure 7.4: Estimate percentage of higher education institutions that have adopted an internationalisation strategy, 2013/14



Source: BFUG questionnaire

Around a quarter of the EHEA countries estimate that their national higher education institutions have widely adopted internationalisation strategies (76-100 %). Among these, six countries (Estonia, Finland, Iceland, Liechtenstein, Luxembourg and Norway), report that all higher education institutions have an internationalisation strategy.

Conversely, almost a third of the EHEA countries estimate that only a few national higher education institutions have adopted an internationalisation strategy (0-25 %). Andorra, Azerbaijan, Georgia and Montenegro state that none of their higher education institutions have such a strategy. However, this does not mean that these institutions are not engaged in internationalisation activities. For instance, in Georgia, 26 % to 50 % of higher education institutions are estimated as being engaged in international activities, despite the lack of any formal strategy. 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 involved in internationalisation activities.

The main conclusion that can be drawn from countries' answers is that it is widely perceived that higher education institutions are highly engaged in internationalisation activities whether or not they have a formal strategy. However, in the light of evidence-based policy-oriented research

demonstrating that institutional strategies have a significant impact on internationalisation activities ⁽¹⁴⁾ the adoption of such strategies could be further encouraged.

7.1.2.2. Internationalisation instruments

Higher education institutions have an increasing choice of instruments or tools in order to carry on the internationalisation process. Nevertheless, the choice of instruments will greatly depend on the available resources for these kinds of activities at institutional level. In some cases, the national legal framework also has an impact on the choice of internationalisation instruments.

Joint programmes/degrees

An essential difference is to be made between the notions of 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. It should be recognised as the legitimate award for such a programme.

Joint programmes and degrees 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. From the early Ministerial declarations in the Bologna Process onwards, there have been commitments to develop further these important 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 are able to 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, this continues to be a preoccupation.

However, a number of countries, (Andorra, Armenia, Bulgaria, Cyprus, Hungary, Liechtenstein, Malta, Moldova, Slovakia, Switzerland and the **United Kingdom**¹⁵) point out that they have not developed explicit notions of joint programmes and joint degrees. In these cases, national legislation may not explicitly allow joint degrees to be awarded, or there may be some ambiguity with regard to legislation. Moreover even in countries where the possibility exists 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 has not developed a mechanism to award joint degrees. For instance, 10-25 % of Russian higher education institutions are estimated as being involved in joint programmes, while they are not allowed to award joint degrees.

Similarly to the last collection of data in 2012, and not surprisingly, countries estimate a much higher number of higher education institutions participating in joint programmes than those actually issuing

⁽¹⁴⁾ EUA, 2013. *Internationalisation in European higher education: European policies, institutional strategies and EUA support*. [Online] Available at http://www.eua.be/libraries/publications_homepage_list/eua_international_survey.sflb.ashx [Accessed 7 November 2014], p.10.

¹⁵ **Question to the United Kingdom:** The percentage of institutions awarding joint degrees is estimated at over 10% (see figure 7.5), while the United Kingdom has not explicitly developed a framework for joint degrees. There seems to be a contradiction. Could you please clarify the situation?

joint degrees (see Figures 7.5 and 7.6). Seven 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), France, Germany, Greece and the United Kingdom answer that more than 10 % of their higher education institutions issue joint degrees. The majority of countries estimate that only 0-2.5 % of their institutions issue joint degrees.

Figure 7.5: Estimated percentage of institutions that award joint degrees, 2013/14, 2013/14

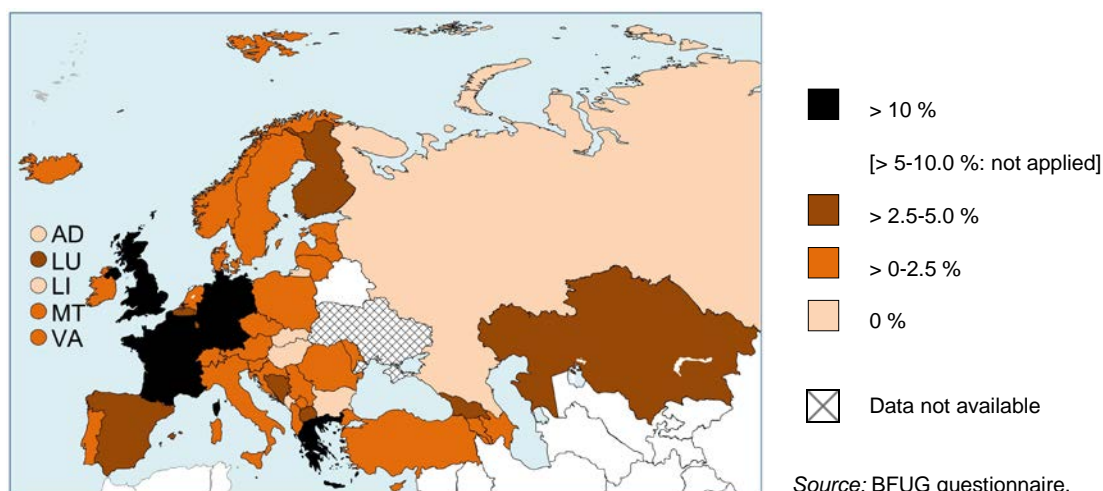
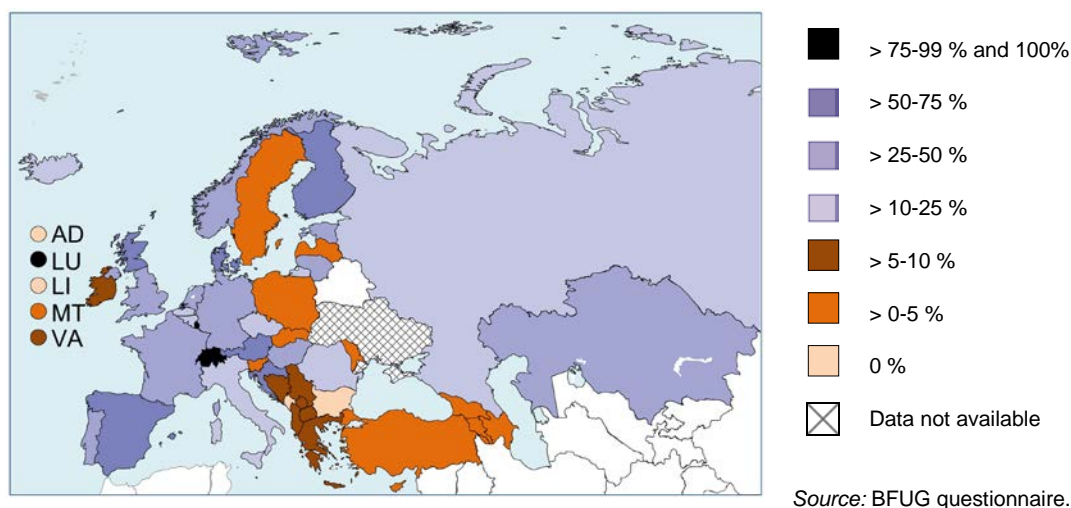


Figure 7.6: Estimated percentage of institutions that participate in joint programmes, 2013/14



From an institutional perspective an important condition for developing joint programmes as a significant feature of the EHEA 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, or by higher education institutions prioritising the funding of flagship joint programmes over their other programmes.

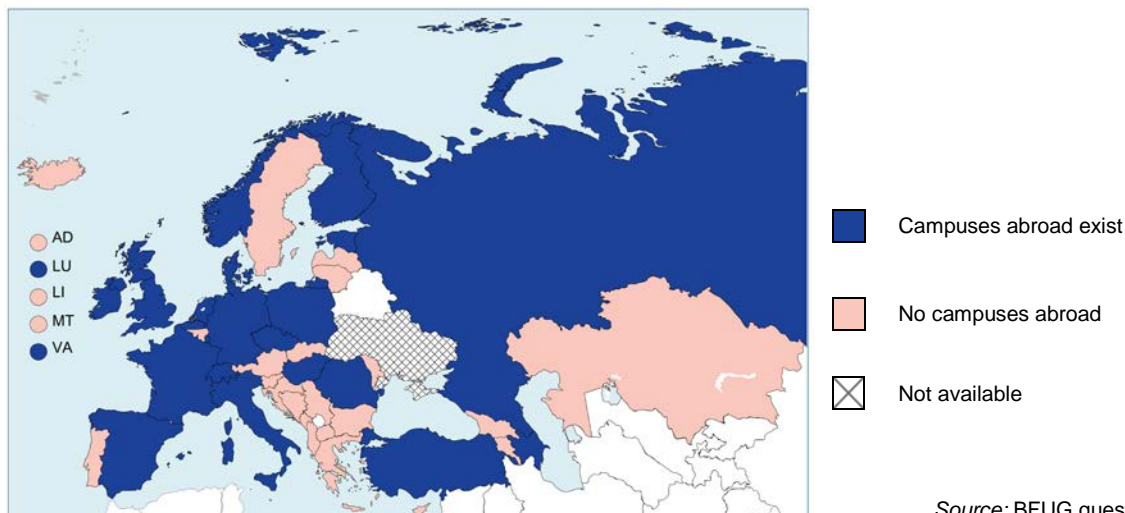
Only a minority of countries (Albania, Finland, Germany, Italy, Luxembourg, Norway, Romania and Spain) report that they provide specific, additional funding to higher education institutions for the development and implementation of joint/double degree programmes. European funding under the Erasmus Mundus Programme, as well as national funding, is used to develop these instruments with international partners. In Finland, for instance, the nationally funded instruments managed by CIMO include the Finnish-Russian Student Exchange Programme (FIRST) for cooperation with North-Western Russia and CIMO's China programme. Both provide support for the development of joint/double degrees, among other cooperation activities. In Luxembourg, double degree programmes are mandatory and specified in the contract between the university and the government. 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 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 ("at least 30 % of the amount allocated to state universities nationwide as core funding").

Campuses abroad

Setting up campuses abroad is another instrument to develop the internationalisation process at institutional level. It should however be noted that "campus abroad" denotes various institutional arrangements. In half of all higher education systems, there exist higher education institutions that have established campuses abroad (See Figure 7.7). However, according to the reported data the number of campuses is almost always limited to less than ten. The main locations of campuses abroad are described in part 7.1.3 Regions of cooperation.

Figure 7.7: Countries for which higher education institutions have campuses abroad, 2013/14



Source: BFUG questionnaire

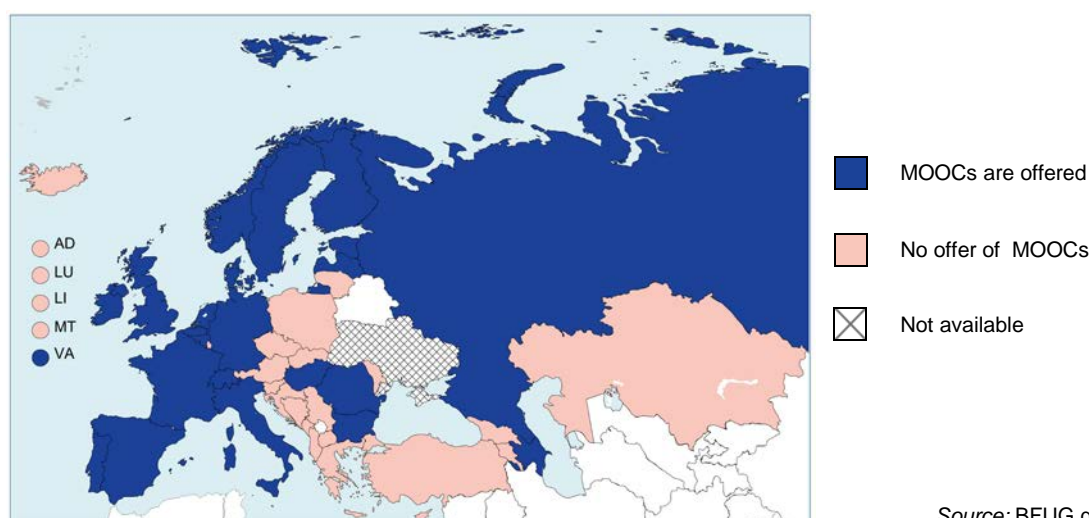
Massive open online courses (MOOCs)

Distance learning and the development of massive open online courses (MOOCs) are examples of the new possibilities offered by technology that serve higher education internationalisation. 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 ⁽¹⁶⁾.

In half of all EHEA systems there are higher education institutions which offer such courses (See Figure 7.8).^{17 18} However, in some countries, only estimated figures are available. Generally, in most countries, the share of higher education institutions that offer MOOCs is very low and rarely goes beyond 10 %. Notable exceptions are Denmark and Spain where 38 % and 30 % of institutions respectively are concerned. In addition, in Ireland and the United Kingdom (Scotland), the rate of involvement of higher education institutions is also relatively high. In terms of actual numbers of MOOCs that are currently offered, such courses are most numerous in Spain (over 200 courses) and the United Kingdom (over 150).

Figure 7.8: Countries in which public higher education institutions offer MOOCs, 2013/14



7.1.3. Regions of cooperation

For the reporting exercise, countries were asked to identify the main regions where they have specific internationalisation activities, namely, international student mobility, joint programmes/degrees, international cooperation in research and campuses abroad. The figures below show the results in percentages for each region ⁽¹⁹⁾. It is important to note that the answers gathered are countries' perceptions, and are not based on empirical evidence.

⁽¹⁶⁾ EUA, 2014. *E-Learning in European Higher Education Institutions: Results of a Mapping Survey*. [Online] Available at http://www.eua.be/Libraries/Publication/e-learning_survey.sflb.ashx [Accessed 2 December 2014], p.55.

¹⁷ **Question for NO, PT, FI, EE, LV, PT, IT:** according to the European MOOCs Scoreboard (OpenEducationEuropa) there were no MOOCs operating during the 2013/14 reference period (although new courses may have been under preparation.) For the final version we will use this information, unless you inform us that it is incorrect...

¹⁸ **Question for AT:** You reported that there were no MOOCs for the reference year. However, according to the European MOOCs Scoreboard there were 7. Unless you tell us this is an error, we will follow this information source and make a change to the map.

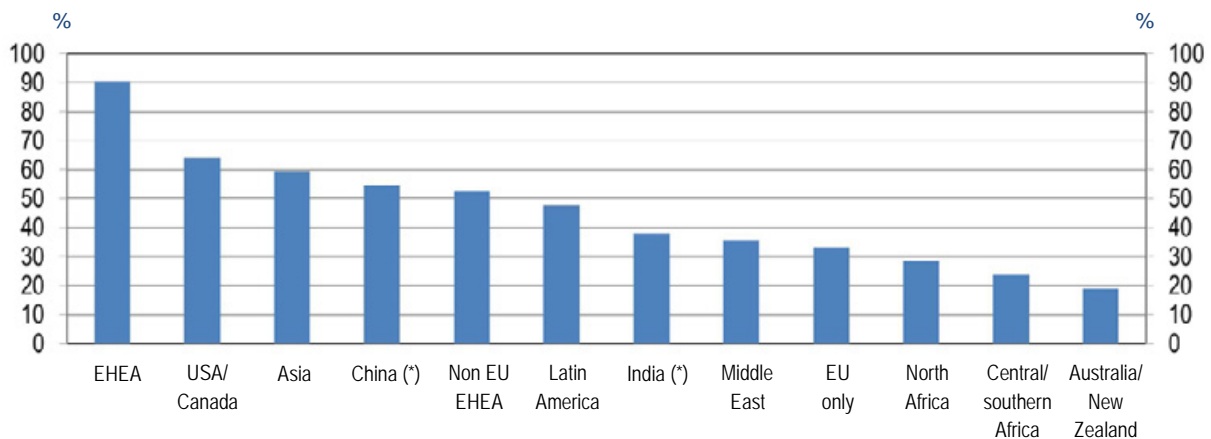
⁽¹⁹⁾ The United Kingdom (England, Wales, and Northern Ireland) does not collect information on these particular issues. Albania, Belgium (Flemish Community), Liechtenstein, Portugal and Slovakia have not provided any estimation, some of them stating that their higher education institutions have links across the globe.

The EHEA appears to be the priority region of cooperation for all four types of activities, with a clear advantage regarding student mobility and the implementation of joint programmes/degrees. It seems that Asia and USA/Canada are also important regions for cooperation for all types of activity.

Student mobility

All higher education systems that provided estimations actually have identified main regions regarding international student mobility. Data available show that (see Figure 7.9), as mentioned above, 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).

Figure 7.9: Countries' perceptions: Main regions of cooperation for international student mobility (Percentage of EHEA higher education systems where estimations are available) , 2013/14



(*) specifically

Source: BFUG questionnaire

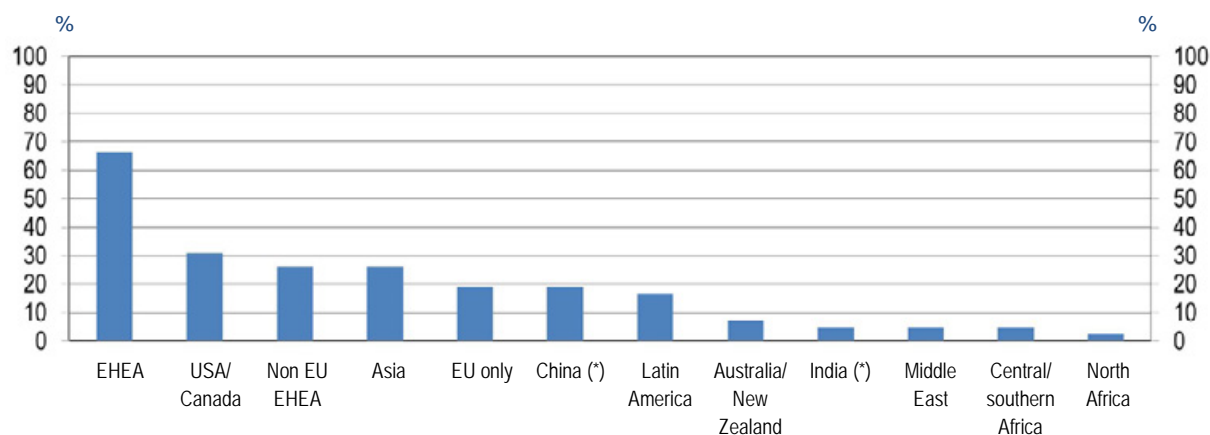
The EHEA region is followed by USA/Canada (64 %), Asia (60 %), China specifically (55 %), "non EU EHEA countries" (52 %) and Latin America (47 %). The Australia/New Zealand region stands at the end of the spectrum, but according to the 2013 European Strategy on internationalisation, the share of mobile students who choose to study in Australia and New Zealand is growing fast ⁽²⁰⁾.

Joint programmes/degrees

More than half of the EHEA higher education systems where estimations are available answered they have main regions of cooperation for joint programmes/degrees (see Figure 7.10).

⁽²⁰⁾ European Commission, 2013, *op. cit.*, p. 4.

Figure 7.10: Countries' perceptions: Main regions of cooperation for joint programmes/degrees (Percentage of EHEA higher education systems where estimations are available) , 2013/14



(*) specifically

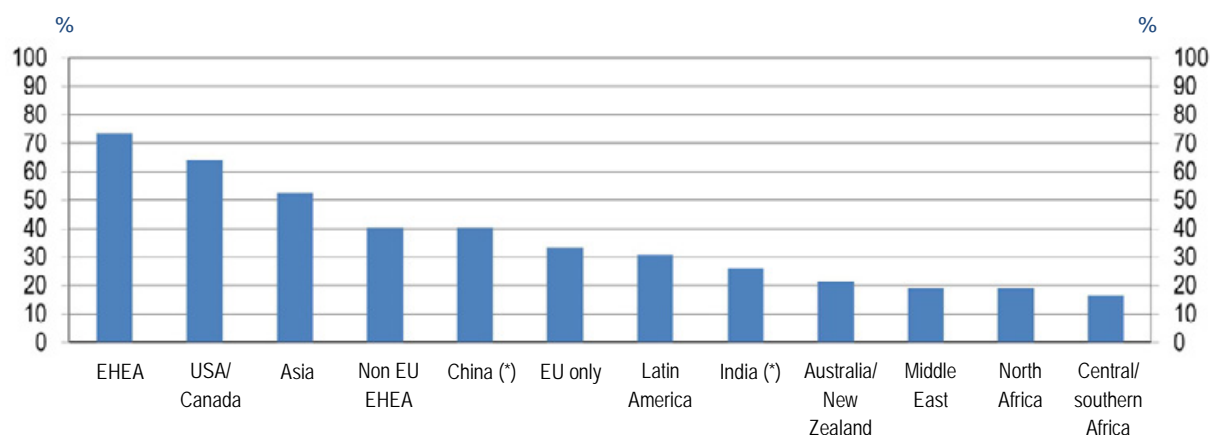
Source: BFUG questionnaire.

Estimations show that the EHEA region is the main region of cooperation (67 %), followed by USA/Canada (31 %), and then by Asia and "non EU EHEA countries" (both 26 %), "EU countries" (19 %), China (19%) and Latin America (16 %). Australia/New Zealand, India, the Middle East and Africa in general are estimated to be less chosen for developing joint programmes/degrees at the moment.

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, and this situation might render estimations difficult to make. Nevertheless, more than half of the EHEA higher education systems where estimations are available answered 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 estimations are available) , 2013/14



(*) specifically

Source: BFUG questionnaire

Countries' perceptions show that there is a high degree of activity with the EHEA region and USA/Canada (more than 60 %). These regions are followed by Asia (52 %) and by China and "non EU EHEA countries" (both 40 %). Australia/New Zealand, the Middle East and Africa stand at the end of the spectrum, but they remain priority regions of activities for a certain number of EHEA countries.

Campuses abroad

As stated above, the implementation of campuses abroad is rather a limited internationalisation activity, the number of campuses being usually limited to less than ten. Moreover, about one third of EHEA higher education systems provided estimations on the main regions of cooperation for this activity. According to data available, these countries seem to prioritise the EHEA region, Asia and China specifically.

Indeed, in the cases of countries where foreign campuses are not high in numbers, they are often situated in other European countries and in particular in neighbouring countries. However, there are examples of foreign campuses in China (Denmark, Italy, Norway, United Kingdom), USA (Spain and the United Kingdom (Scotland)), South Africa, Qatar, Thailand, Indonesia (the Netherlands). In the case of Germany, branch campuses and bi-national universities are located in a variety of countries (Egypt, Jordan, Oman, Turkey, China (2), South Korea, Vietnam, Singapore, Mongolia, Kazakhstan, Kyrgyzstan, Hungary and Bulgaria).

Other internationalisation activities

Some countries mention other internationalisation activities, such as capacity building with developing and emerging countries and cooperation through staff mobility. Staff mobility will be addressed later in this chapter (7.2.2 International staff mobility).

It is clear that there are disparities or imbalances regarding the regions of cooperation in higher education. Migration policies, security issues, operational obstacles or simply the geographical situation can slow down the development of higher education relations with some parts of the world. The main challenge is to remove these obstacles when possible, in order to give the opportunity to all regions of the world to cooperate in higher education and to benefit from the enhanced knowledge gains brought by these activities.

7.2. Mobility

International mobility is a major driver of the internationalisation of higher education, as the phenomenon concerns several key actors of higher education systems. It allows students to acquire valuable competences and skills needed to live and work in the global market, while it helps staff to gain new ideas, methods and skills and to develop relations between institutions. Mobility also forces higher education institutions (home and host institutions) to change and adapt and therefore to learn. Mobility thus contributes to the internationalisation of higher education in ways that are interconnected and relatively complex.

As mentioned in the introduction of the chapter, 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, paving the way for more high quality mobility exchanges and fewer obstacles across the continent for student and staff mobility. Some of these issues will be addressed in the current section, namely the questions of target setting, obstacles to mobility, measures to tackle these obstacles and monitoring.

This section will first address student mobility questions and will then turn to staff mobility issues.

7.2.1. International student mobility

The 2012 Communiqué underlines that learning mobility is, "essential to ensure the quality of higher education, enhance students' employability and expand cross-border collaboration within the EHEA and beyond" ⁽²¹⁾. Specific terms have been developed to describe different forms of student mobility. Firstly, **incoming mobility** takes the perspective of the country of destination – the country where the student moves to in order to study. The 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 where the student moves. 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).

Degree mobility is a long-term form of mobility which aims at acquiring a whole degree or certification in the country of destination, which is different from the student's country of origin ⁽²²⁾. **Credit mobility** is a short-term form of mobility – usually a maximum of one year – aiming at acquiring credits in a foreign institution in the framework of on-going studies at the home institution. The most famous example for credit mobility is given by the Erasmus mobility programme, with over 3 million students having participated in the programme between its start in 1987 and the academic year 2012-13 ⁽²³⁾.

⁽²¹⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 3.

⁽²²⁾ 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.

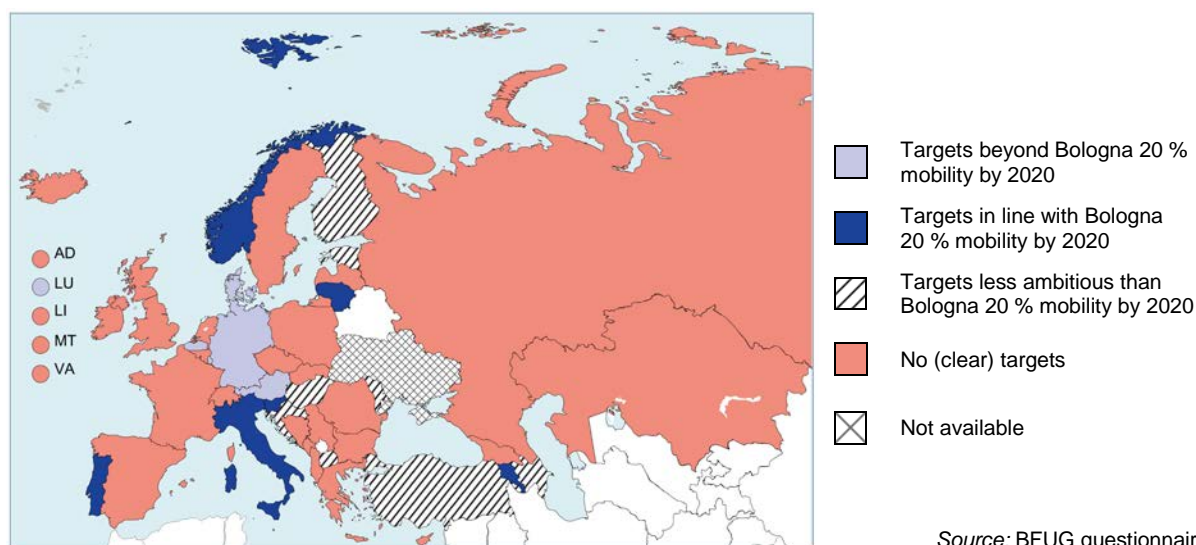
⁽²³⁾ European Commission, 2014. *The Erasmus Impact Study. Effects of mobility on the skills and employability of students and the internationalisation of higher education institutions*, [Online] Available at http://ec.europa.eu/education/library/study/2014/erasmus-impact_en.pdf [Accessed 9 December 2014], p. 61.

7.2.1.1. Target setting

The 20 % by 2020 EHEA target adopted in 2009 ⁽²⁴⁾ is a benchmark at European level that may or may not correspond to the situation of specific countries. For some it may be over-ambitious while for others not ambitious enough. Thus, through the Mobility Strategy, Ministers agreed that countries should develop and implement their own internationalisation and mobility strategies with their own measurable and realistic mobility targets.

Figure 7.12 below shows that, at national level, around half of the countries do not have any (clear) national targets regarding outward degree or credit mobility ⁽²⁵⁾.

Figure 7.12: Countries with outward student mobility targets, 2013/14



Explanatory note

Outward targets include either degree, credit or both degree and credit mobility

Armenia, Italy, Lithuania, Norway, Portugal and Slovenia have adopted national targets in line with the European one. In most cases targets have only been defined for credit mobility, the short-term form of mobility. This could be explained by the fact that, from a certain perspective, outward credit mobility might be preferred to outward degree mobility. Indeed, outward credit mobility implies that students spend a short period abroad and typically return to the home institution in order to finish the programme. Generally, this form of mobility is not perceived as generating a loss of revenues for national institutions. Conversely, outward degree mobility implies that students leave the country in order to acquire a degree and may be associated with a loss of revenues and/or a potential brain drain. However, it should be underlined that 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 in their countries after a long period spent abroad, contributing to the development of the society. The challenge for national authorities is to create the conditions to attract graduates back to their home countries after their studies abroad.

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,

⁽²⁴⁾ At least 20 % of those graduating in the EHEA should have had a study or training period abroad by 2020.

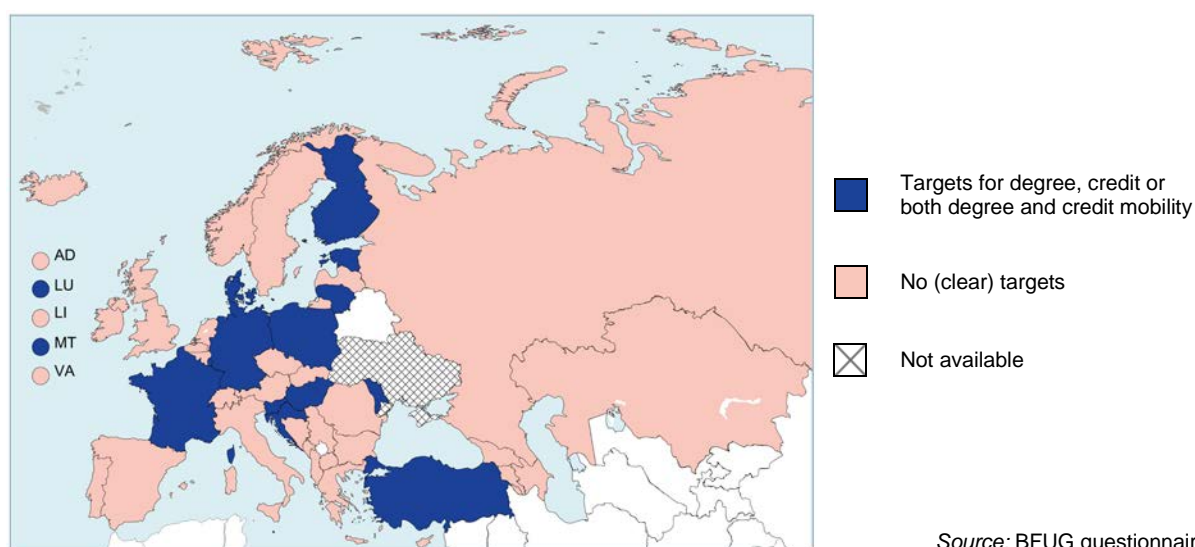
⁽²⁵⁾ Ideally, a "clear target" should be either quantitative or qualitative and associated with a timeline or a year when the target should be reached.

while Belgium (Flemish Community) has a national target of 33 %. Luxembourg, a special case, has a 100 % target which it currently achieves since all students must have a study experience abroad. Azerbaijan, Croatia, Estonia, Finland, "The former Yugoslav Republic of Macedonia", Hungary, Moldova and Turkey have less ambitious targets than the collective target of 20 % mobility ⁽²⁶⁾. These cases show that reaching the European benchmark may be desirable for many countries, but not for all. Some countries such as Finland set a short-term target (e.g. 2015), while some others that have a limited experience of structured mobility, express their target in numbers of students. Although objectives are often limited, they encourage institutions to move forward. For example, in Russia, the student population is massive, mobility is encouraged, but few students are going abroad (see Figure 7.16 and 7.17). This is also the case for many of Russia's neighbouring countries.

Figure 7.13 shows that very few countries have defined clear national targets. 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 entails potential benefits such as additional revenues to higher education institutions and to the national economy through an influx of highly skilled people.

Poland is an example of a country that has set a target. Here the target is for 5% by 2020 for credit and degree mobility (from 1,4 % in 2011). Malta also has the objective of welcoming 5 000 degree mobile students by 2020. A small number of countries focus on the share of doctoral students in third cycle programmes: these include Estonia, Finland and France, where the share of international doctoral candidates by 2015 should be 10 %, 20 % and 14 % respectively.

Figure 7.13: Countries with incoming student mobility targets, 2013/14



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.

⁽²⁶⁾ Question to Azerbaijan, Finland, Hungary, Moldova and Turkey: Could you please confirm?

Targets for incoming students with a first degree outside the EHEA

Countries are also encouraged to adopt a national target for incoming international students with a first degree obtained outside the EHEA. This is a topic of policy relevance and importance in the EHEA. However, no countries report any clear targets on this particular topic. This may be more a function that is 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 in the section 7.2.2.2. of the current chapter. Regarding international partnerships, for example, the percentage of cooperative agreements on joint degrees between international and Danish educational institutions should increase by 20 % by 2020, compared to 2012 (50 agreements for joint programmes). Lithuania²⁷ has set the target of 30 successfully implemented joint study programmes by 2020. In France, where the share of foreign doctoral candidates is about 40%, the target set concerns the annual numbers of foreign doctoral candidates registered in a « co-tutelle » or in joint international supervisions of thesis. They should be 2000 in 2015 according to the target defined by the 2014 annual performance plan (versus 1695 in 2013). Finally, by 2020, at least one fifth of doctoral students should study in joint programmes in Slovenia.

Denmark has set other targets such as the number of students spending short period abroad in 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 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 (2 167 students in 2011).

7.2.1.2. Student mobility flows

The systematic collection of mobility data is currently possible only for degree mobility, with some limitations regarding outward mobility. Thus, this chapter will present information on degree mobility only. However, data on credit mobility is currently in the process of being collected in the EU framework. It should be made available from 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 can be distinguished: 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

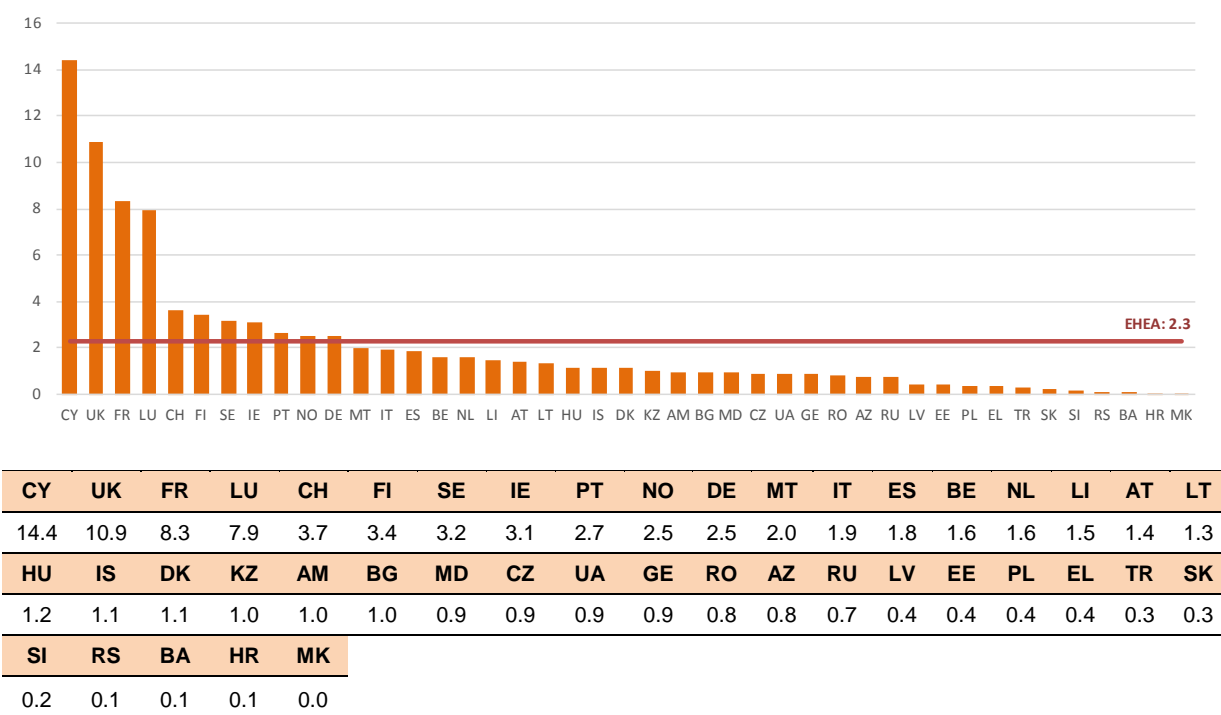
Figure 7.14 depicts the incoming degree mobility rate to EHEA countries, showing mobile students from the whole world coming to each EHEA country for which data is available (excluding mobile students from other EHEA countries). It compares the number of students from outside the EHEA that were attracted to the country, with the total student population in the country concerned. 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. Indeed, two tertiary education systems that attract the same

²⁷ **Question for Lithuania:** Could you provide the current data on joint programmes, so that the difference with the target becomes clear

number of students from outside the EHEA but that send 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



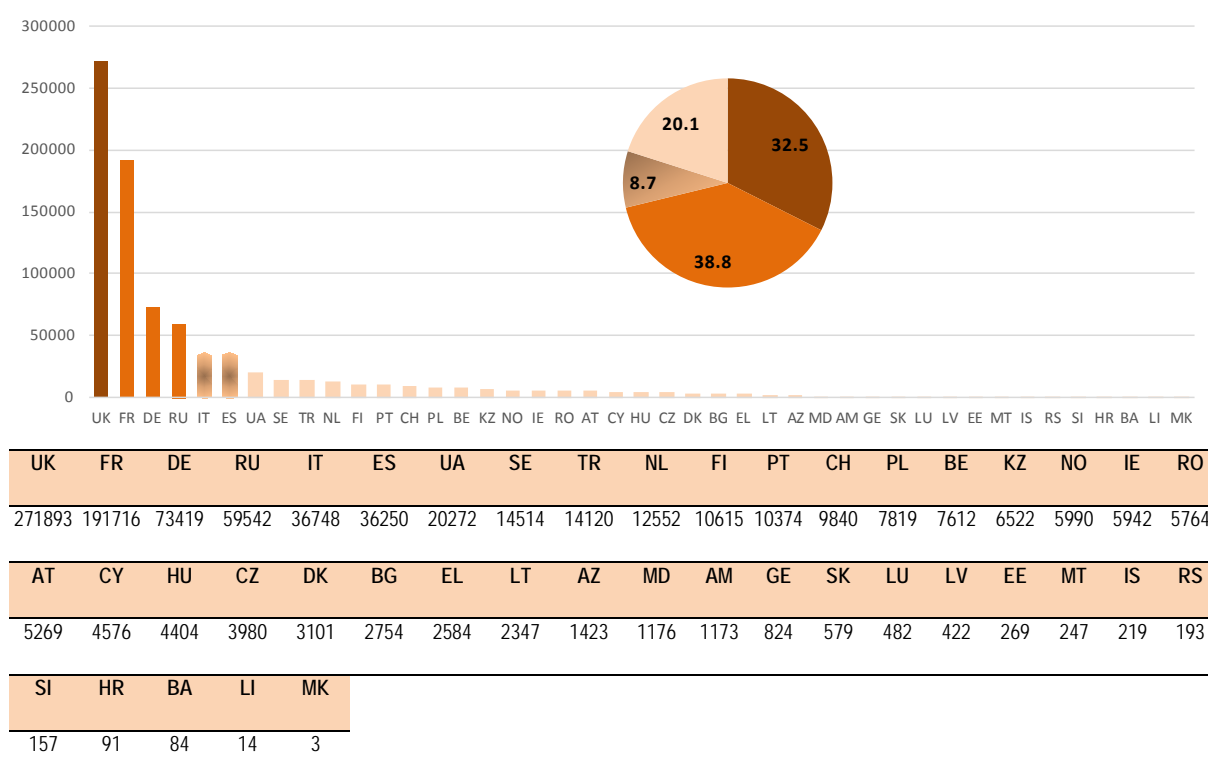
Notes: Albania, Andorra, Holy See and Montenegro are not included. EHEA is the EHEA weighted average.

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, 18 countries reach less than 1 %. The weighted average of all EHEA countries is 2.27 % (2.25 % in 2008/09).

Figure 7.14 should be complemented by the number of tertiary mobile students from outside the EHEA (see Figure 7.15). Indeed, the most attractive EHEA countries are those countries which attract the lion's share of the total flow of mobile students from outside the EHEA. Four countries, namely the United Kingdom, France, Germany and Russia, attract 71.3 % of all non-EHEA mobile students enrolled in the EHEA. The same four countries attracted 76% of all students from outside the EHEA in 2008/09. Thus the share of these countries has diminished for the benefit of other EHEA countries.

Figure 7.15: Number of incoming degree tertiary education mobile students from outside the EHEA by country of destination, 2011/12



Note: Germany: ISCED 5A only. Bildungsausländer only, i.e. foreign students that gained their higher education entrance qualification abroad

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

The United Kingdom, with more than 270 000 incoming degree students, is the EHEA country that attracts the most of mobile students from outside the EHEA (32.5 %-comparing to 30 % in 2008/09). 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 also belong to the top four but with 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 raised for the United Kingdom and France, but has decreased for Germany and Russia. Moreover, France, Germany and Russia represented 46 % of the share in 2008/09, but declined to 38.8 % in 2011/2012. 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 that are 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 is capable to 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 on this issue and use the same mobility criterion (e.g. prior education or usual residence). However, this is far from being the case at the moment.

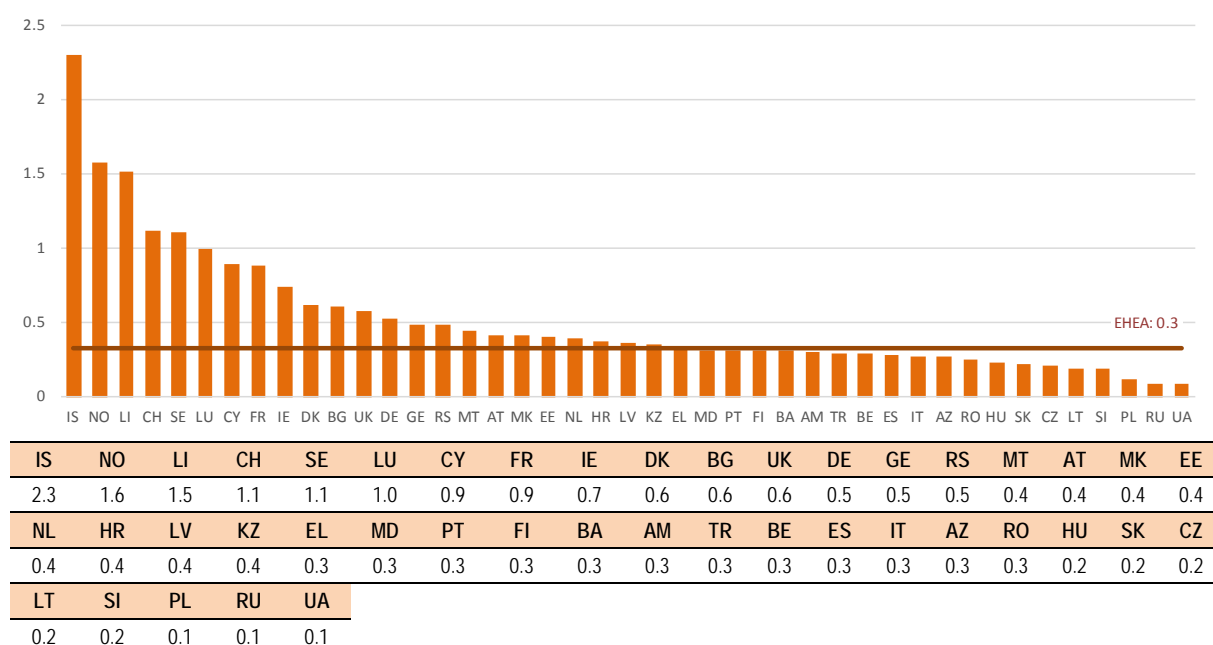
Currently, the reliability of outward mobility data is limited by:

- The availability of data in the countries covered and the number of countries covered: the data exploited here included the mobility data from the EHEA (excluding the following missing countries: Albania, Andorra, Holy See and Montenegro) and a selection of non-EHEA countries: Australia, Canada, Japan, New Zealand and the United States.
- The quality of data provided: whenever provided, as stated above, mobility data may rely on different criteria (i.e. citizenship, prior/permanent residence, prior education), which do not measure exactly the same phenomenon.

In 2011/2012, the outward degree mobility rate is highest in Iceland, reaching slightly more than 2 % (see Figure 7.16). This country is followed by Norway, Liechtenstein, Switzerland, Sweden, and Luxembourg, where the range is from 1 % to 1.6 %, far higher than the weighted average of the EHEA countries which reaches only 0.33 % (0.34 % in 2008/09).

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 rates of these countries are caused by a limited supply of tertiary educational programmes (e.g. the lack of programmes in some fields of study).

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

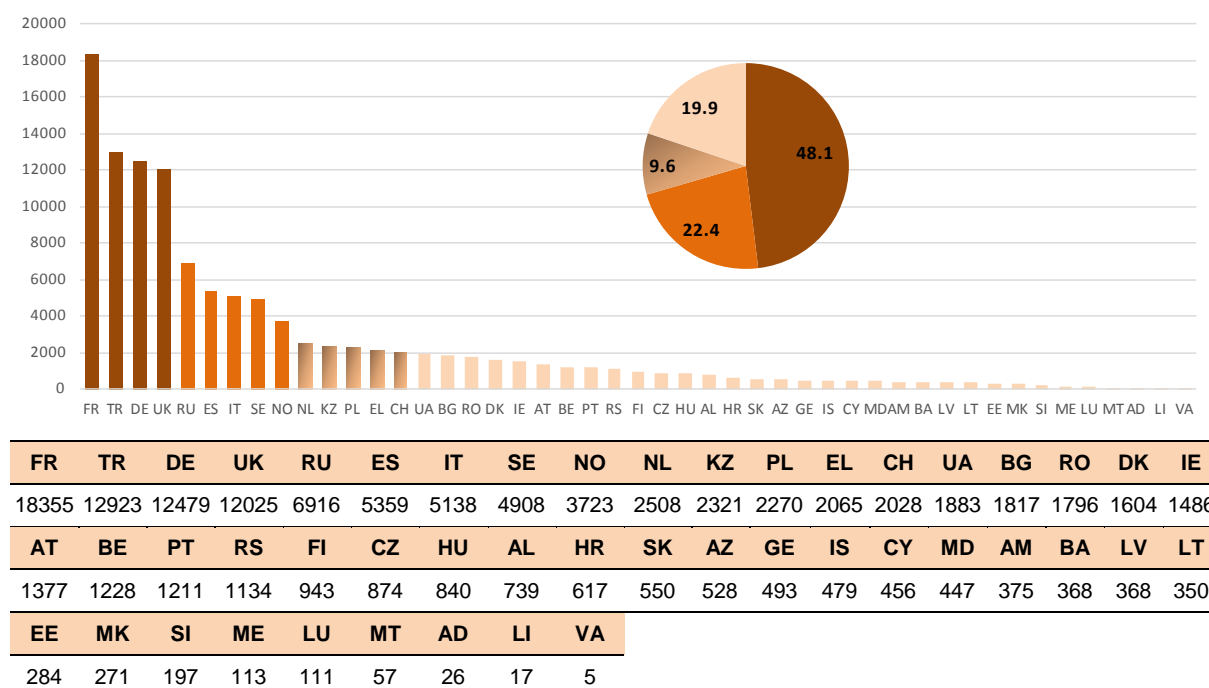


Notes: Destinations outside of the EHEA considered are Australia, Canada, Japan, New Zealand and the United States. Data refer to foreign students instead of mobile students for the following country of destination: Japan. EHEA is the EHEA weighted average.

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

The distribution of outward degree students from the EHEA to non-EHEA countries (Australia, Canada, Japan, New Zealand and the United States) is very imbalanced (see Figure 7.17). In 2012, the students originating from four countries (France, Turkey, Germany and the United Kingdom) account for nearly half (48.1 %) of all outward mobile students from the EHEA. These four countries sent from around 12 000 students (United Kingdom) to slightly more than 18 300 students (France) to the non-EHEA countries considered in the reporting exercise. The same four countries had a 48 % share in 2008/09. However, the numbers have decreased for France, Turkey and Germany in 2011/2012, while they have very slightly increased for the United Kingdom.

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 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 22.4 % of all outward mobile students from the EHEA going in non-EHEA countries. These countries send less than 10 000 students (from 3723 students for Norway to 6916 students for Russia). They had an 18 % share in 2008/09. The share of countries sending between 2 000 and 4 000 students has diminished from 19 % (2008/09) to 9.6 % (2011/12). 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 half of the countries of this group). Nevertheless, the share of countries sending less than 2000 students changed from 16 % (2008/09) to 19.9 % (2011/12).

Data show that inward and outward mobility flows with non-EHEA countries is 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.

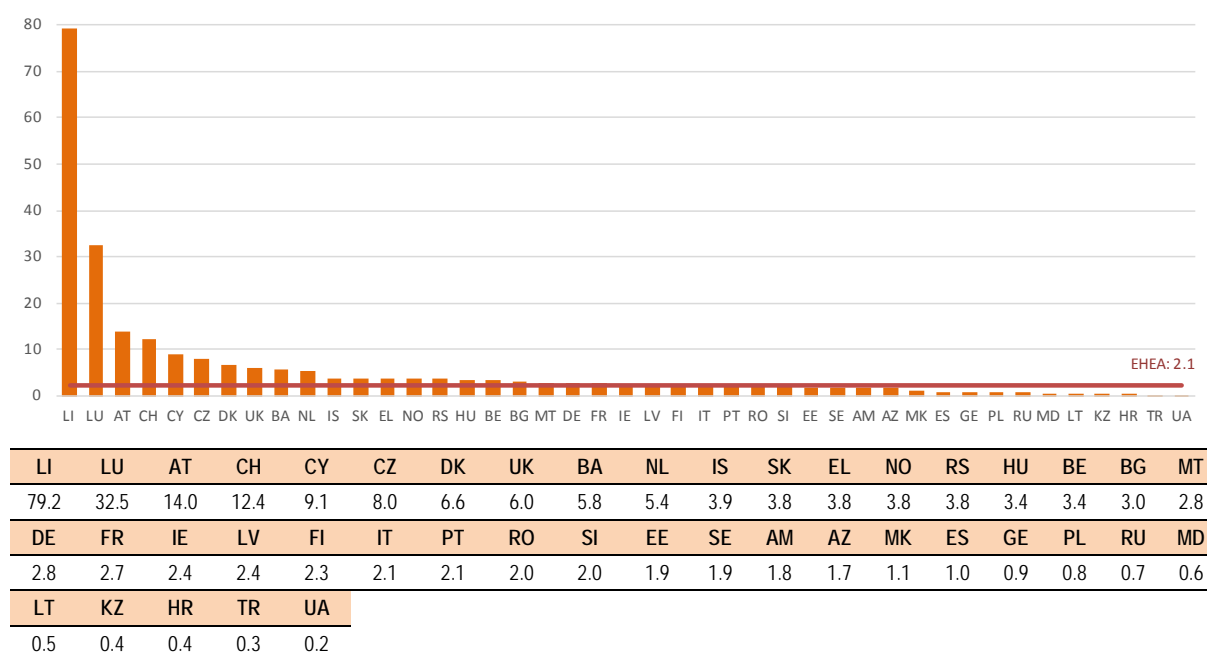
Outward and inward mobility flows within the EHEA

The purpose of this section is to analyse mobility flows within the EHEA, looking at inward and outward mobility, as well as the balance of mobility flows.

Inward mobility flows within the EHEA

Figures 7.18 and 7.19 show the incoming degree mobility flows within the EHEA. Austria with 14 % and Switzerland with 12 % have the highest incoming mobility rate of the EHEA, along with smaller states such as Liechtenstein, Luxembourg and Cyprus (see Figure 7.18). All other countries show levels below 10 % out of which all but five (Czech Republic, Denmark, the United Kingdom, Bosnia and Herzegovina and the Netherlands) are below 5 %. The EHEA weighted average stands at 2.1 % (1.72 % in 2008/09).

Figure 7.18: Incoming degree mobility rate – tertiary education mobile students from the EHEA studying in the country as a percentage of the total number of students enrolled, by country of destination, 2011/12



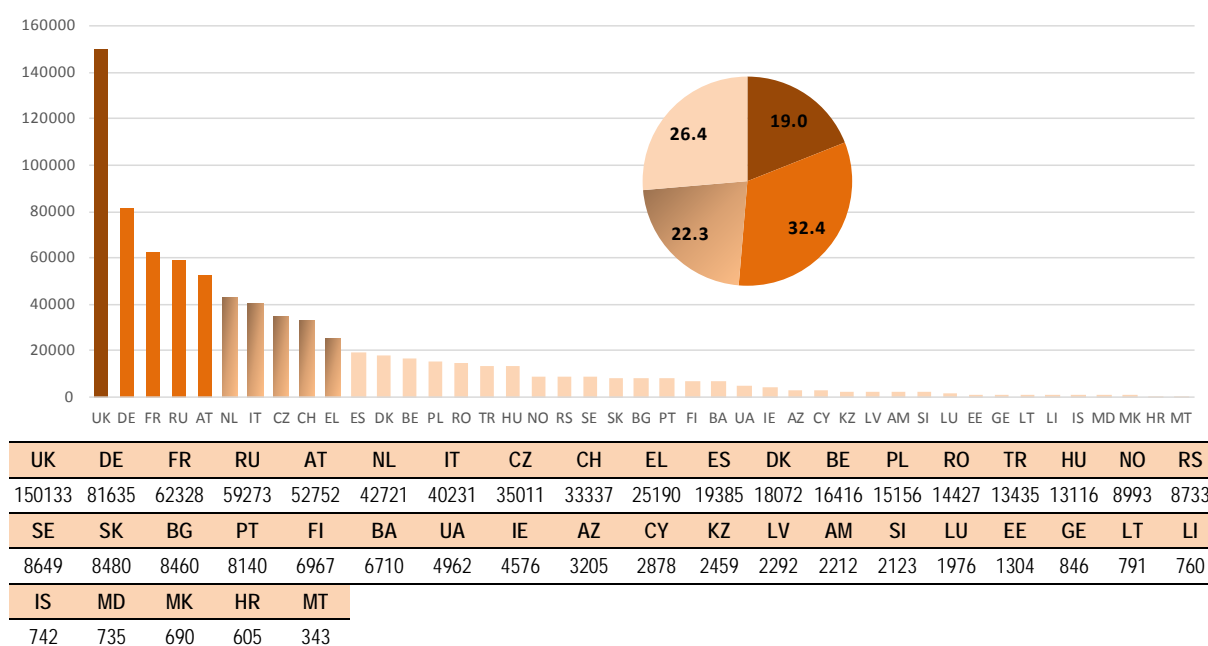
Note: EHEA is the EHEA weighted average.

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

Figure 7.19 presents the distribution of incoming degree mobile students within the EHEA for each country. It turns out that 51.4 % of all incoming students from inside the EHEA choose the United Kingdom, Germany, France, Russia or Austria as their destination of study. Each of these countries receives more than 50 000 students from other EHEA countries. In 2008/09, 54 % of all incoming EHEA students were going to the United Kingdom, Germany, France and Austria. This shows that the share of these countries has slightly decreased since the last collection of data.

Similarly to the situation presented in Figure 7.15 (incoming students from outside the EHEA), the United Kingdom is by far welcoming the highest number of mobile students from the EHEA. With 150 133 students (130 203 in 2008/09), the United Kingdom hosts nearly twice as much students from the EHEA than Germany and almost 3 times the number of hosted students in Russia.

Figure 7.19: Number of incoming degree tertiary education mobile students from the EHEA, by country of destination, 2011/12



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

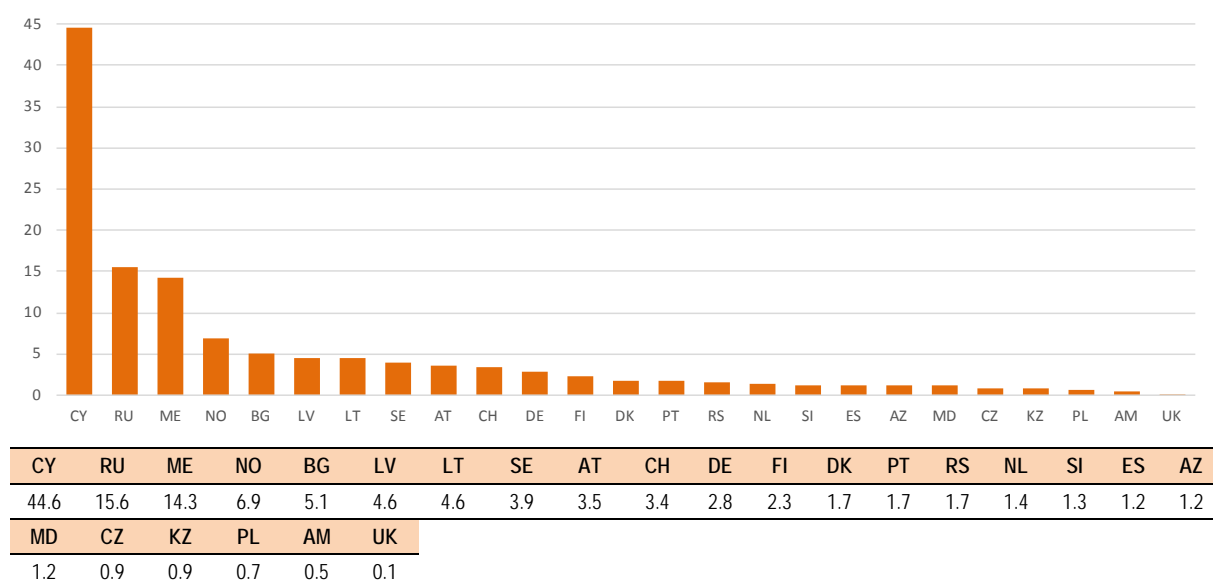
Overall, the Netherlands, Italy, Czech Republic, Switzerland and Greece host 22.3 % of incoming students from the EHEA. It is interesting to note that the Netherlands hosted 19 081 students from the EHEA in 2008/09, while it hosted more than 40 000 in 2011/12.

In the light of the current data, and similarly to the previous Report, incoming degree mobility flows do not reach significant values compared to the tertiary student population. Indeed, 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, this rate has slightly increased since 2008/09 where it reached 4%.

Outward mobility flows within the EHEA

Figure 7.20 shows graduates from a country of the EHEA who have graduated abroad inside the EHEA 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 taken with extreme caution due to the low country coverage (only 19 countries provided data on graduates by country of origin).

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

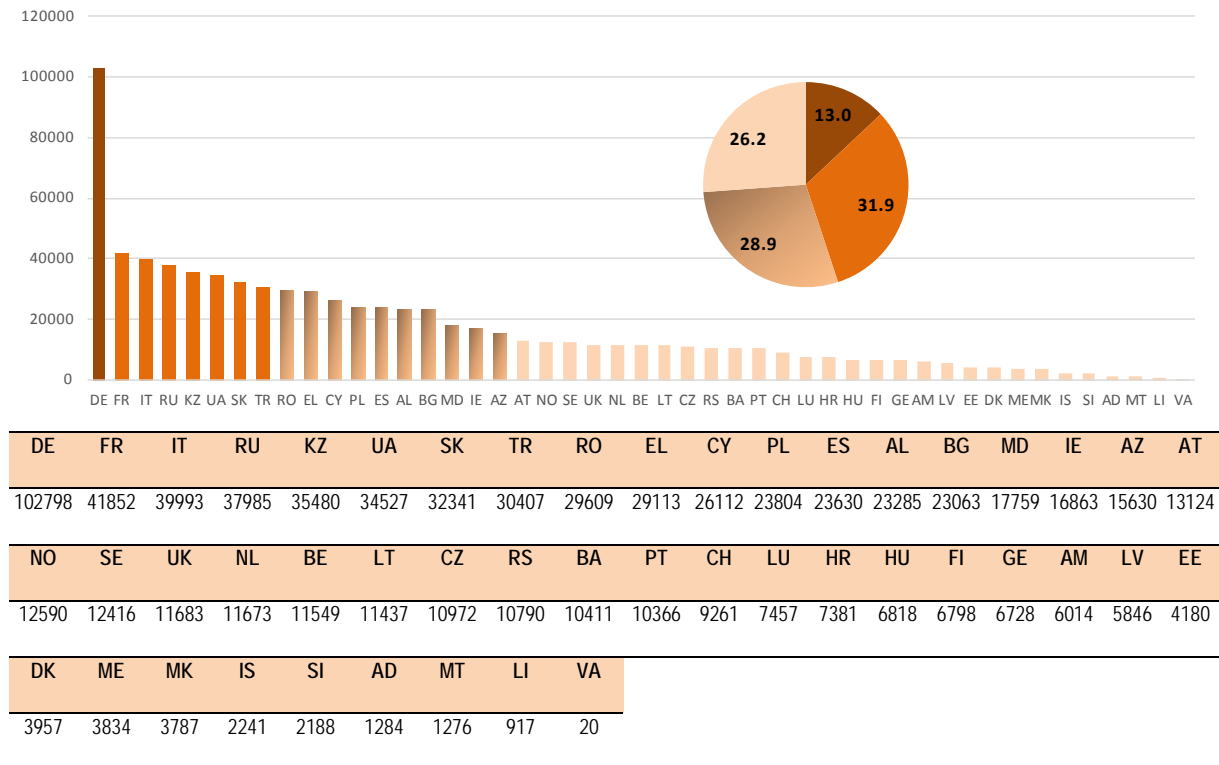


Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Cyprus with an outward degree mobility rate of graduates of around 44 %, Russia, Montenegro, Norway and Bulgaria display the highest values, between 5.1 % and 15.6 %. The vast majority of EHEA countries for which data is available, however, reach values of less than 5 %.

Figure 7.21 presents information on outward degree mobility within the EHEA. Similarly to the 2008/09 data, it shows that Germany is the country that sends the highest number of students for a degree in another EHEA country. Indeed, nearly 102 800 students move away from Germany to study in another EHEA country, representing 13 % of the total number of EHEA students being abroad within the EHEA. In 2008/09, the share was also 13 %, but the number of students was lower (76 717)).

Figure 7.21: Number of outward degree tertiary education mobile EHEA students within the EHEA, by country of destination, 2011/12



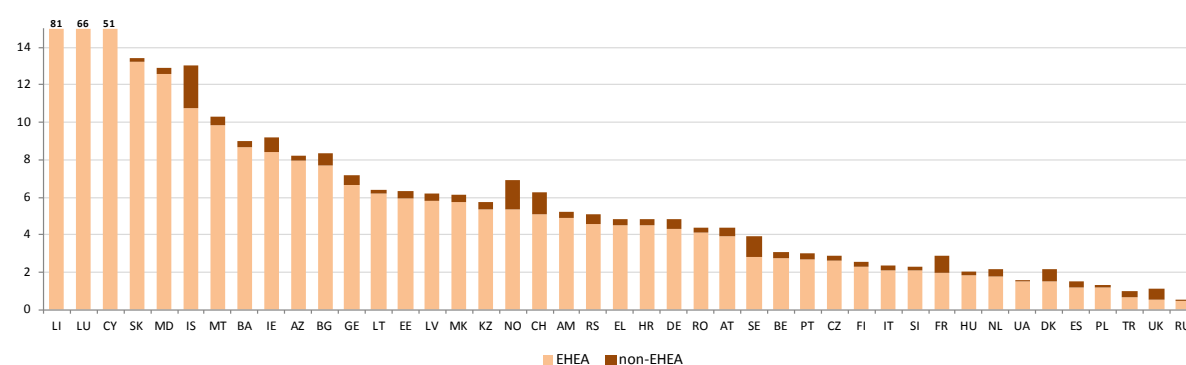
Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

Far behind Germany, a group of seven countries send more than 30 000 students across the EHEA. The situation is still disparate among them: France and Italy send around 40 000 students in the EHEA, while Turkey sends 30 407 students.

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 outward degree mobility rate by area of destination, 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 is thus a measure of the 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, by country of origin, 2011/12



Area	LI	LU	CY	SK	MD	IS	MT	BA	IE	AZ	BG	GE	LT	EE	LV	MK	KZ	NO
EHEA	81.9	66.7	51.3	13.2	12.6	10.7	9.9	8.7	8.4	8.0	7.7	6.7	6.2	5.9	5.8	5.7	5.4	5.3
non-EHEA	1.5	1.0	0.9	0.2	0.3	2.3	0.4	0.3	0.7	0.3	0.6	0.5	0.2	0.4	0.4	0.4	0.4	1.6

Area	CH	AM	RS	EL	HR	DE	RO	AT	SE	BE	PT	CZ	FI	IT	SI	FR	HU	NL
EHEA	5.1	4.9	4.6	4.5	4.5	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
non-EHEA	1.1	0.3	0.5	0.3	0.4	0.5	0.3	0.4	1.1	0.3	0.3	0.2	0.3	0.3	0.2	0.9	0.2	0.4

Area	UA	DK	ES	PL	TR	UK	RU
EHEA	1.5	1.5	1.2	1.2	0.7	0.6	0.5
non-EHEA	0.1	0.6	0.3	0.1	0.3	0.6	0.1

Notes: Destinations outside of the EHEA considered are Australia, Canada, Japan, New Zealand and the United States.

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

Three countries show a specific profile in the EHEA, namely, Liechtenstein, Luxembourg and Cyprus. They present a particularly high outgoing mobility rate: students abroad are more numerous than those who stay studying in their own country. This phenomenon may be explained by two main factors such as a limited provision of programs for some fields of study as well as short distances from the borders.

Apart from these countries, Slovakia, Moldova and Iceland are the only countries to reach 10 % of students enrolled abroad in the EHEA. On the opposite, three countries do not reach the threshold of 1 % (Turkey, United Kingdom and Russia).

Figure 7.22 also shows that the EHEA students have a preference for undertaking studies in the EHEA rather than in other parts of the world (being understood here as 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 is the EHEA country which 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 and the Netherlands. In all other countries, mobility outside the EHEA accounts for less than 20 % of the overall mobility.

Balanced vs. imbalanced mobility

The aspiration for more balanced mobility was reinforced with the Bucharest Communiqué ⁽²⁸⁾ and the 2012 Mobility Strategy, in which Ministers ask for more balanced mobility (especially for degree mobility), "since it have 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"⁽²⁹⁾.

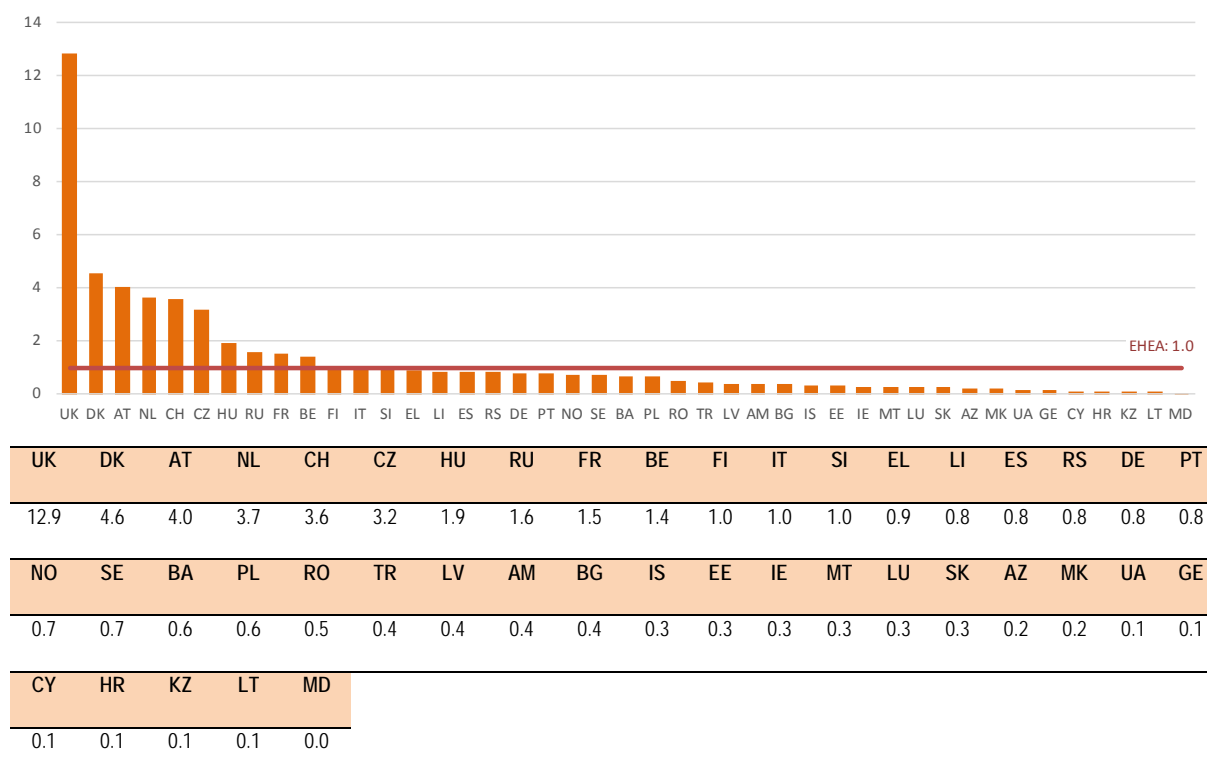
This section looks at the balance between outward and incoming mobility flows and examines the national incoming/outgoing mobility ratio with EHEA and non-EHEA countries. The main aim is to identify 'net importing countries' (ratio greater than 1 – the country receives more mobile students than it sends) and 'net exporting countries' (ratio below 1 – the country sends abroad more students than it hosts). It should be kept in mind that a balanced mobility hides different realities. 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).

Figure 7.23 show that most EHEA countries (30 countries out of 43 for which data is available) are net exporters of students towards other EHEA countries (i.e. outgoing students outnumber incoming students; ratio below 1). Only three countries (Finland, Italy and Slovenia) show a balanced mobility with the rest of EHEA countries (ratio equal to 1), while few countries are net importers of students with the rest of the EHEA (i.e. incoming students outnumber outgoing students; ratio above 1). These net importers, mostly Western European countries, are the United Kingdom, Denmark, Austria, the Netherlands, Switzerland, the Czech Republic, Hungary, Russia, France and Belgium.

⁽²⁸⁾ Bucharest Communiqué: Making the Most of Our Potential: Consolidating the European Higher Education Area, 26-27 April 2012, p. 4.

⁽²⁹⁾ EHEA, 2012. *Mobility for Better Learning – Mobility strategy 2020 for the European Higher Education Area*. [Online] Available at: [http://www.ehea.info/Uploads/\(1\)/2012 %20EHEA %20Mobility %20Strategy.pdf](http://www.ehea.info/Uploads/(1)/2012%20EHEA%20Mobility%20Strategy.pdf) [Accessed 15 October 2014].

Figure 7.23 : Mobility balance: incoming/outgoing tertiary students ratio within the EHEA, 2011/12



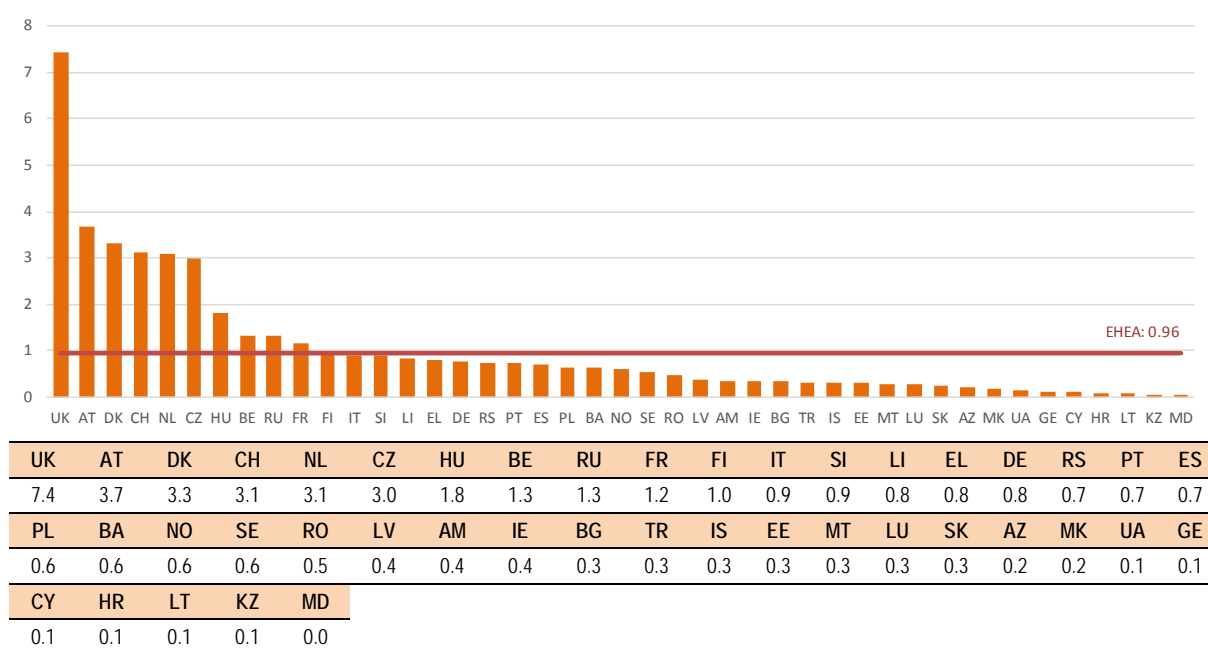
Source: Eurostat (UOE data collection) and additional collection for the other EHEA countries.

The data in Figure 7.24 show that nearly all countries that are net importers of students from the rest of the EHEA (i.e. incoming students outnumber outgoing students) keep a similar position when considering the non-EHEA countries. However, the imbalance is less pronounced for most of them.

Finland shows balanced mobility flows with EHEA and also when considering non-EHEA partners, while Italy and Slovenia record a balance with the EHEA but short imbalance when taking into account non-EHEA countries, with a ratio of 0.9 (i.e. net exporter).

It is important to underline again that the incoming/outgoing ratio outside the EHEA (Figure 7.24) suffers from a clear under-coverage as only a selection of countries (Australia, Canada, Japan, New Zealand and the United States) is considered as the non-EHEA countries. This under-coverage has a differentiated impact on countries. For instance, it is expected that countries that established privileged links with some areas of the world because of shared languages (English-speaking area, 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



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

Specific bilateral imbalances ⁽³⁰⁾

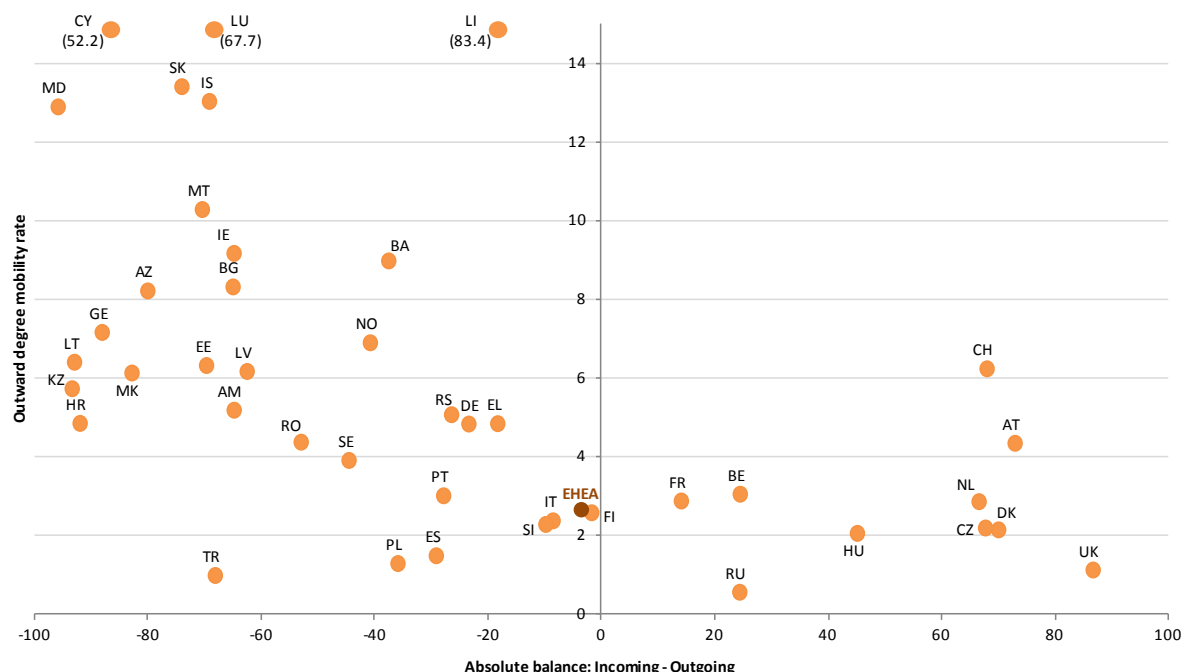
Significant imbalances exist between particular countries. For example, the United Kingdom is a net importing country whatever the EHEA partners, but the imbalance is especially high with Ireland, Greece, Germany and Cyprus. Each of these countries sends far more students (a surplus of more than 10 000 students) to the United Kingdom than they receive from it. Austria is also a net importing country especially from Germany, Italy and 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. On the opposite, 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 exceeds 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. The extent to which imbalanced mobility can create damage to society and higher education system depends on the situation of individual country. When problematic, partners should work together in order to find the reasons and solutions for these imbalances. However, even when imbalanced mobility does not lead to major problems for partners, better balanced mobility should be sought.

³⁰ 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, Wejwar, Unger, Terzieva (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.

Figure 7.25 below allows adding some information to the mobility balance. It shows an obvious relationship between the mobility balance (X axis) ⁽³¹⁾ and the outward degree mobility rate (Y axis) ⁽³²⁾: 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



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

Explanatory note

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.

Figure 7.25 allows highlighting some atypical countries. Indeed, 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).

Conversely, the Baltic countries, Croatia, "The former Yugoslav Republic of Macedonia", Georgia and Kazakhstan are much more sending than receiving students (they are situated on the left of the X axis), but such "exportation" does not result in the highest outward mobility rates (their outward

⁽³¹⁾ 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.

⁽³²⁾ Both axis include mobility flows within and outside the EHEA.

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, 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 comes along with a relatively high outward degree mobility rate, meaning intense mobility flows from and to this country.

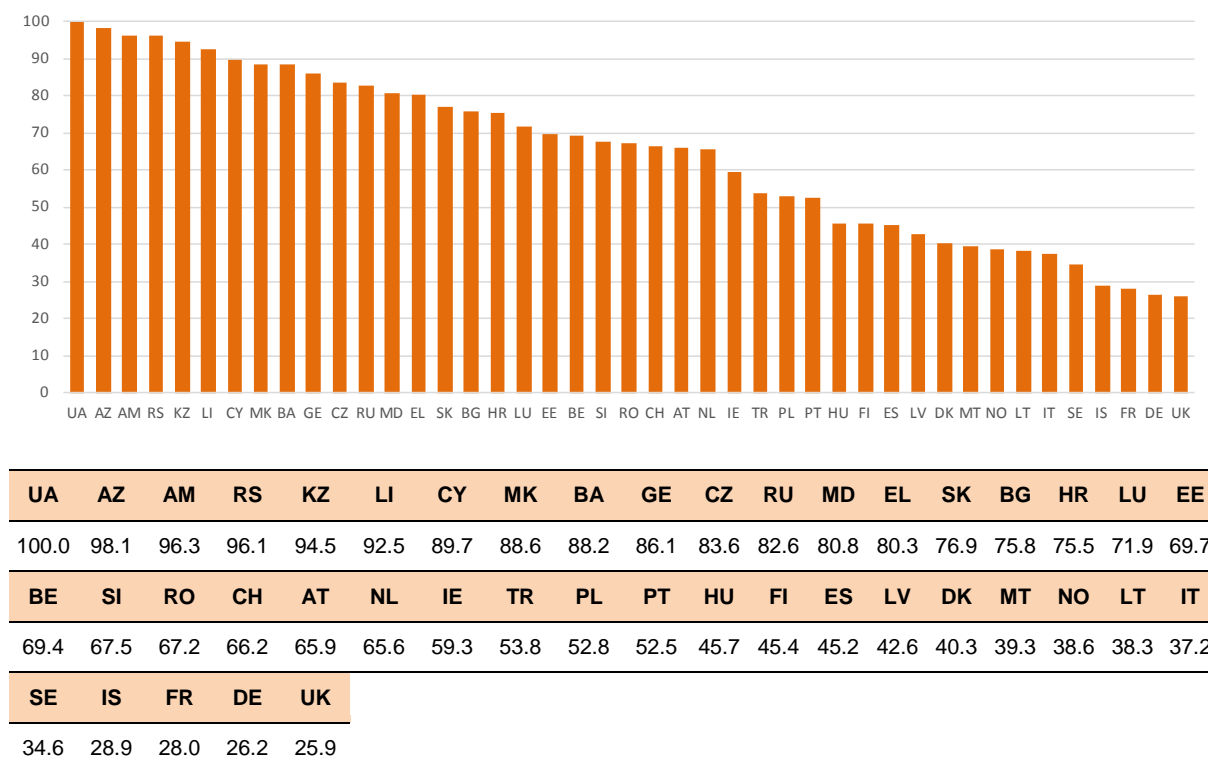
The main findings are that the number of countries with balanced mobility is rather low, and that few countries combined balanced mobility with higher degree of inward and outward mobility (Liechtenstein).

Mobility imbalances: Origin of students and destinations

From a more qualitative perspective, the balance of mobility flows could also be understood in terms of origin (for host countries) and destination (for sending countries).

The indicator on inward degree mobility diversity (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. As for other indicators, the restriction of the geographical coverage to some countries outside the EHEA (Australia, Canada, Japan, New Zealand and the United States) is a clear limitation, especially for those countries that receive students from countries from other parts of the world that are not covered here.

Figure 7.26: Student mobility flows: top 3 countries of origin (inward) in %, 2011/12



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

In the majority of the EHEA countries for which data is available, the origin of incoming students is not highly diverse. Indeed, more than 65 % of the total incoming degree mobility flow involves students from three countries of origin. In some countries, the inflow of students is even more concentrated, as

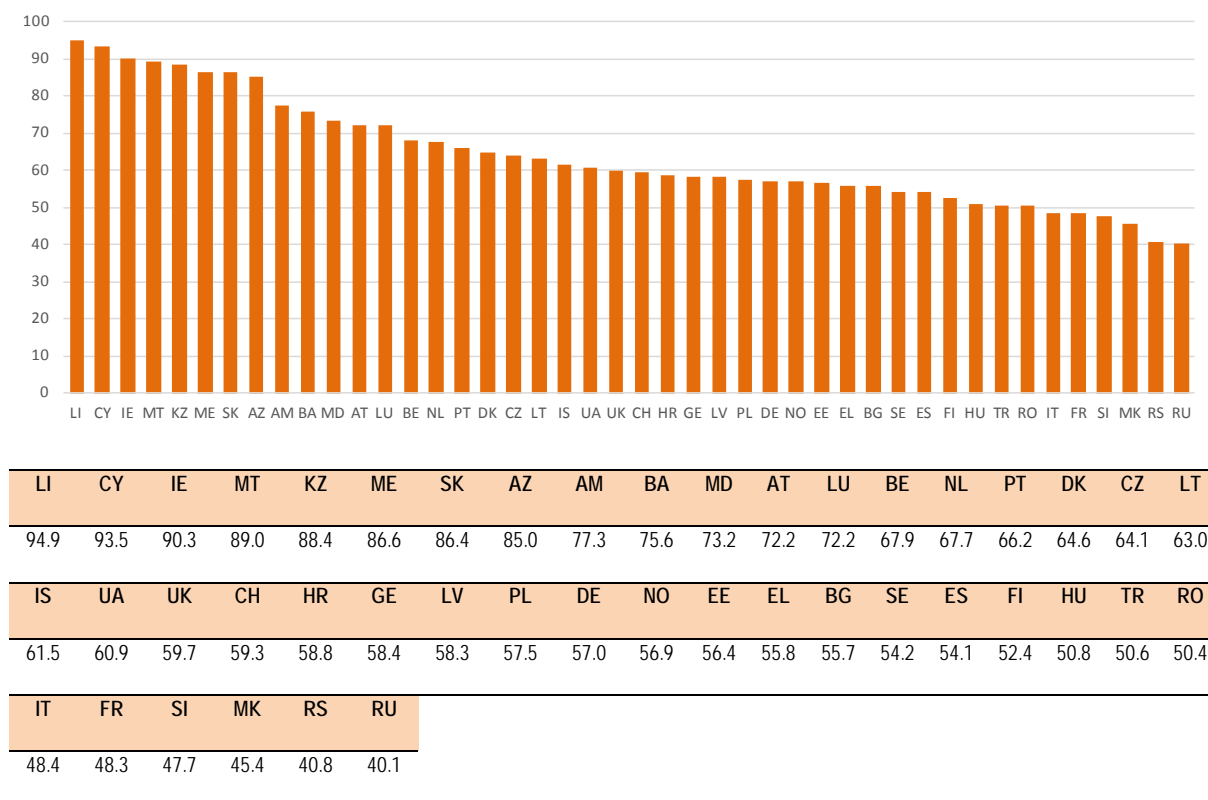
more than 90 % of incoming students come from three countries. This is especially the situation in Azerbaijan (where nearly all mobile students are from Turkey, Russia and Georgia), Serbia (from Bosnia and Herzegovina, Montenegro and Croatia), Kazakhstan (from Russia, Turkey and Azerbaijan) and Liechtenstein (Austria, Switzerland and Germany). Ukraine offers a particular picture as nearly all incoming students come from Russia, Moldova and Turkey.

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 three countries that host the highest number of EHEA students (refer to Figure 7.19). Indeed, in the United Kingdom, France and Germany, students from the top-three origins account for 28 % or less of the total number of incoming students. In the United Kingdom 25.9 % of incoming students originate either from Germany, Ireland or the United States. In Germany, 26.2 % of incoming students originate from Russia, Austria or Bulgaria, while in France, students from Germany, Italy and Spain account for 28 % of all incoming tertiary students. In addition to the United Kingdom, US students are among the top-three most represented origins in three EHEA countries: Ireland, Malta and Sweden. In Ireland, 59 % of hosted students come from the United Kingdom, the US and Canada.

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), Finland (from Russia, Estonia and Sweden) or in Georgia (from Turkey, Azerbaijan and Russia).

The indicator on outward degree mobility diversity (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: Destinations outside of the EHEA considered are Australia, Canada, Japan, New Zealand and the United States.

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

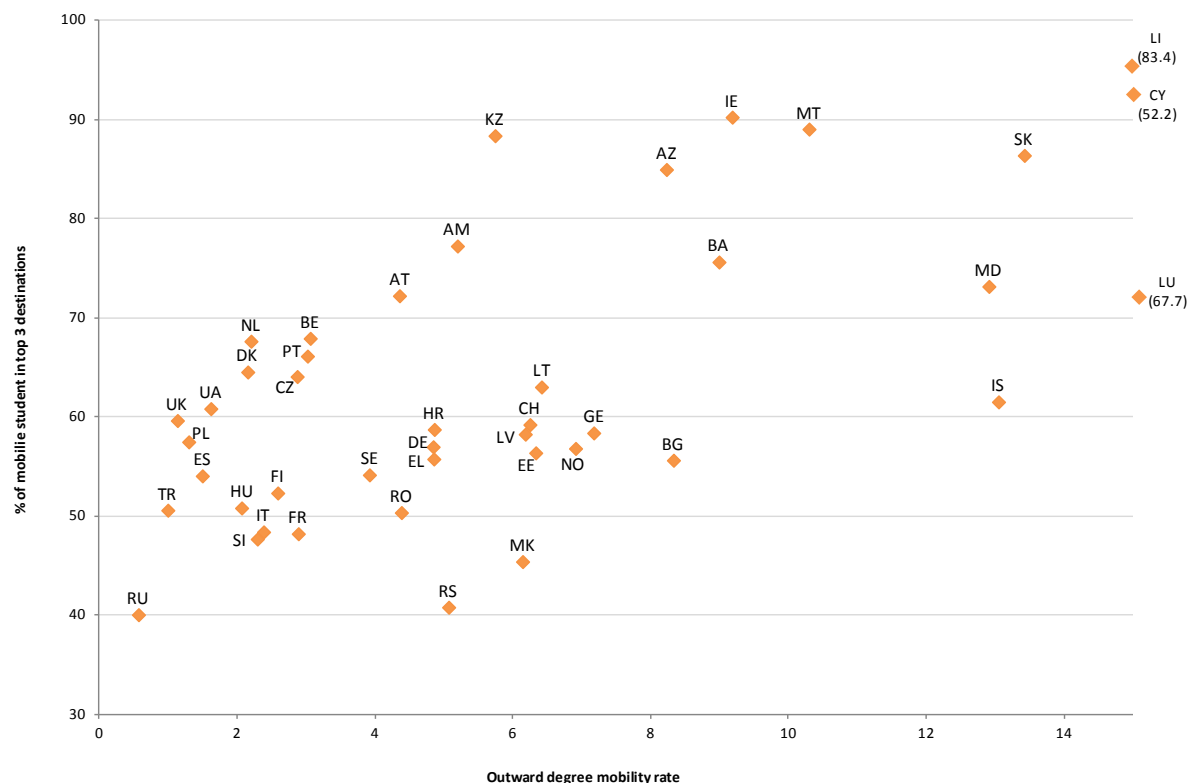
More than 90 % of outgoing students from Liechtenstein, Cyprus and Ireland are pursuing their tertiary studies in three countries. Most students away from Liechtenstein are enrolled for a degree either in Switzerland, Austria or Germany, which can surely be explained by their shared language and geographical proximity. Those away from Cyprus are mainly studying equally in Greece or in the United Kingdom. The US are the third destination but for fewer Cypriot students. The geographical proximity with Greece as well as the historical legacy with the United Kingdom may explain such pattern. The United Kingdom, the US and France are the top three destination of students away from Ireland. However, the United Kingdom accounts for the lion's share as it is the destination of nearly 82 % of Irish students undertaking a degree abroad.

As the United Kingdom is by far the EHEA country that is receiving the highest number of mobile students, it is not surprising that it is the top destination for students from numerous other countries: Switzerland (24 %), Denmark (28 %), Estonia (27 %), Greece (38 %), Spain (20 %), Finland (25 %), France (21 %), Italy (18 %), Lithuania (42 %), Latvia (36 %), Norway (27 %), Poland (24 %), Romania (19 %) and Malta (83 %). Besides, the US is the favourite destination of outgoing student from three EHEA countries: Sweden (22 %), Turkey (27 %) and the United Kingdom (38 %). 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. 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) ⁽³³⁾.

Figure 7.28: Outward mobility versus diversity of destination countries (mobility flows within and outside EHEA), 2011/12



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 to Switzerland, while mobile Cypriot students undertake a degree in Greece (48 %) and in the United Kingdom (44 %).

Some other countries show specific patterns. Kazakhstan records an outward mobility rate of 5.7 % but a very large majority of mobile students (78 %) go to Russia. Inversely, the outward mobility rate of Serbia is 5.1 % but the top three destinations (Bosnia and Herzegovina, Austria and Hungary) accounts each for less than 17 %. Russia is in a similar position, outward mobility rate is relatively low (0.6 %) and the top three destinations account altogether for only 40 %.

Overall, degree mobility flows are imbalanced either in terms of numbers, countries of origin and countries of destination. As said above, imbalances do not lead necessarily to major problems, but more balanced mobility should constantly be sought. It will be interesting, in the light of the collection of data on credit mobility, to see whether this type of mobility has a positive influence on mobility balance.

⁽³³⁾ Figure created by plotting the diversity of country of destination and the outward mobility rate.

7.2.1.4. Obstacles to student mobility

Data show that mobility still concerns relatively small numbers of students in proportion to the EHEA student population. This situation may be partly explained by the fact that many obstacles continue to prevent some students from being mobile. It is thus vital to identify the main obstacles to student mobility in order to find ways to overcome them and to improve mobility. For the reporting exercise, countries have identified the three most important obstacles that they perceive towards 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. This concern is equally spread across EHEA countries. However, for incoming mobility, language-related barriers are considered to be equally important as funding. The significance of language obstacles diminishes by half in the context of outgoing mobility, the second main important obstacle for outward mobility being the lack of information and encouragement. 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 can result in additional financial burden.

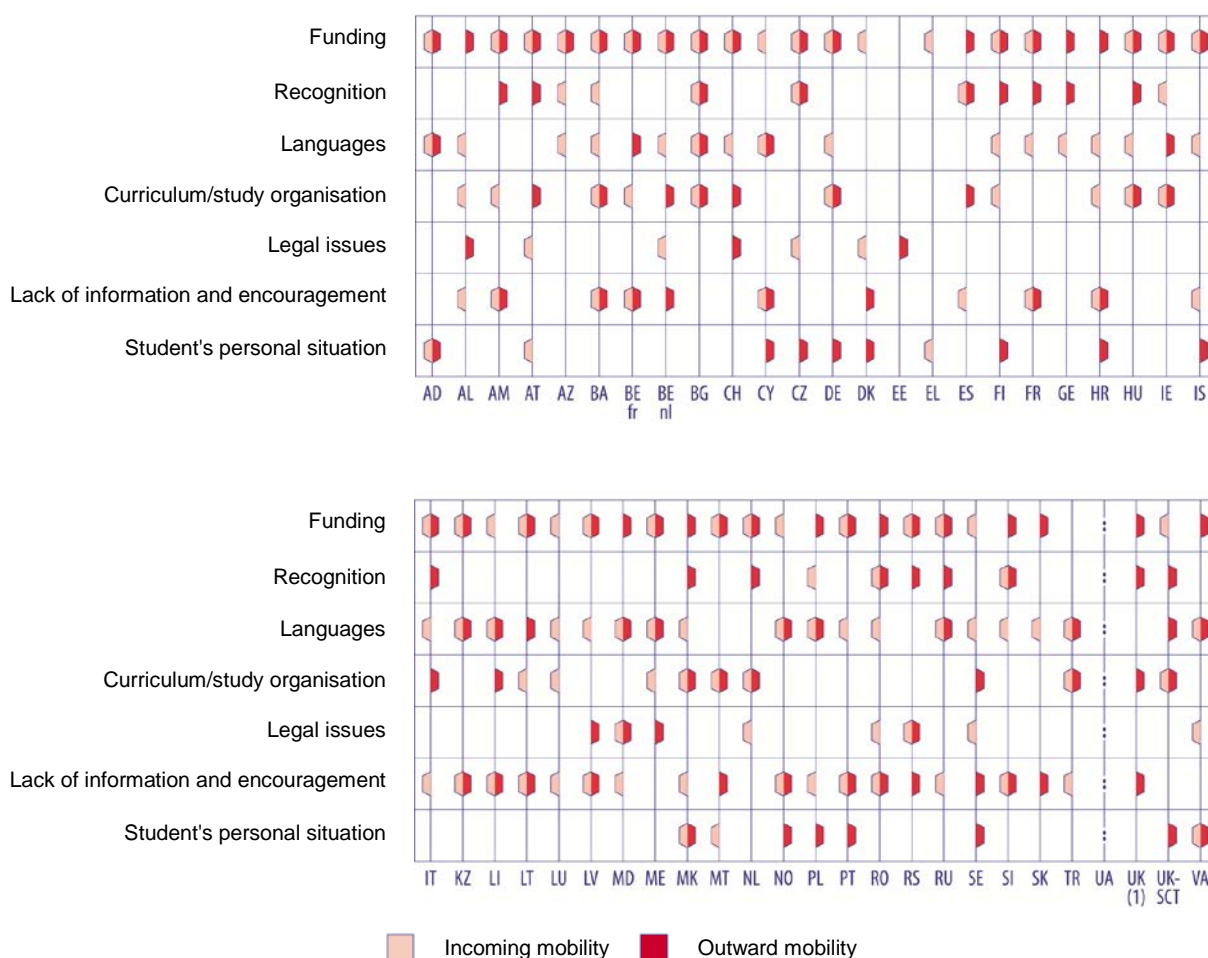
The third most often cited obstacle to incoming mobility perceived by countries is the lack of information and encouragement, while recognition and curriculum organisation issues are considered equally important for outgoing mobility in third place.

It is interesting to note that recognition issues are cited twice more often in relation to outgoing mobility as compared to incoming one. Similarly to the question of languages, this may be explained by an issue of perception. In other words, these findings suggest that countries see their own systems and students more positively than those elsewhere. For example, there might be a tendency to consider national students better prepared regarding languages for going study abroad than incoming students from other countries.

Only a small minority of countries mention legal obstacles like immigration regulations and visa procedures. 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 mention 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 incoming and outgoing mobility, the main obstacles perceived by countries 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.

Figure 7.29: Obstacles to student mobility, 2013/14



Source: BFUG questionnaire.

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

Countries have also reported whether some obstacles as identified above are particularly relevant for a specific study cycle, field of study and/or credit or degree mobility. The majority of countries highlight persisting difficulties with recognition and inflexible curricula. Regarding various fields of studies, medical and natural sciences, law and teaching appear to be more challenged 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) to the satisfaction of the relevant national professional regulator / body. Most often countries report specific obstacles related to either credit or degree mobility. The most common concerns for credit mobility lie in recognition and curriculum organisation. The issue of increasing demand for traineeships abroad and persisting problems related to it has been particularly singled out. The most relevant obstacles to degree mobility appear to be funding and languages.

The Eurostudent survey allows the comparison between countries' and students' perceptions with regard to obstacles to mobility. Figure 30 below shows obstacles as perceived by students when considering enrolment abroad (outward mobility). Data do not distinguish between credit and degree mobility.

The main obstacles identify 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. Moreover, student personal situation is still the second obstacle cited by students

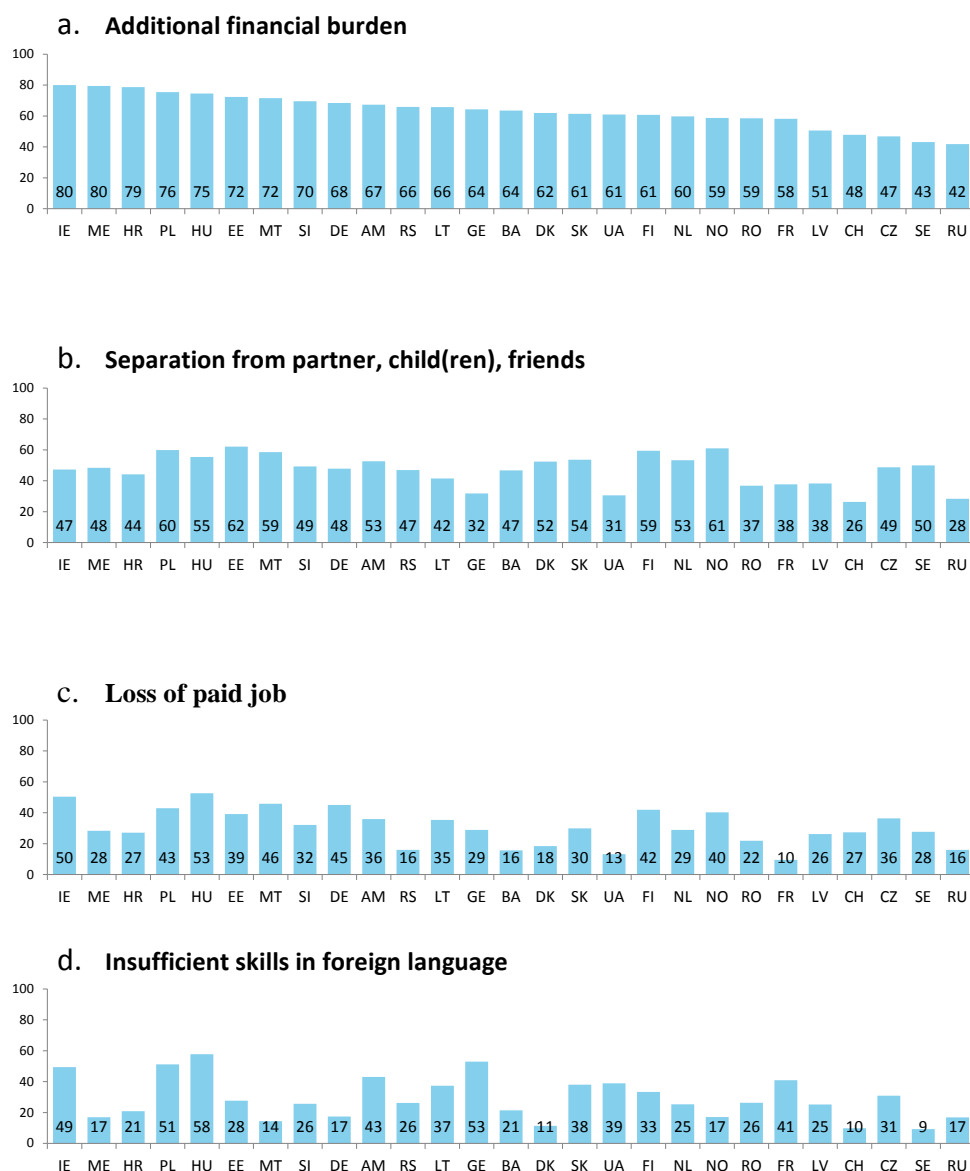
whereas it is not a particularly critical obstacle according to countries' perceptions. However, while countries highlight the lack of information and encouragement as the second obstacle that could prevent students from undertaking studies abroad (outward mobility), this issue appears not to be a top obstacle in students' perspective. Similarly, recognition issues seem to be more important for countries than for students.

Study organisation and language issues are fairly equally important for 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.

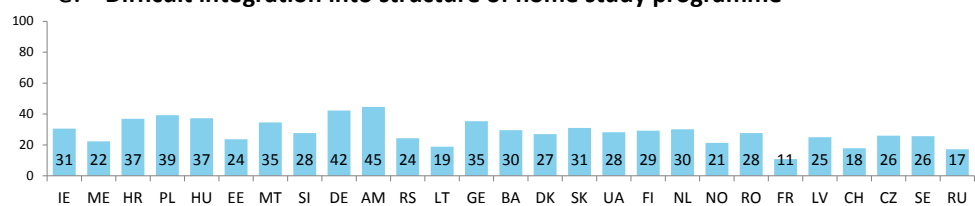
Besides, visas and legal issues do not appear to be of critical importance for both countries and students.

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).

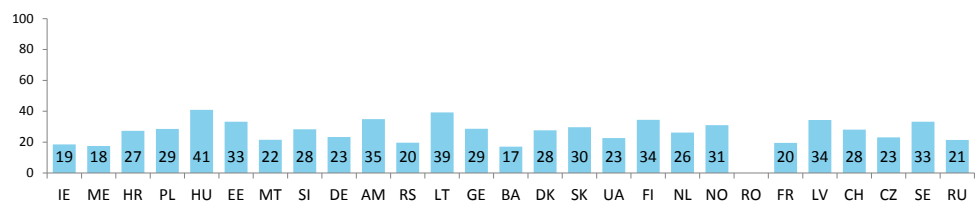
Figure 7.30 : Share of students who have not been enrolled abroad and do not plan to enrol abroad considering selected issues as (quite) big obstacles (in %)



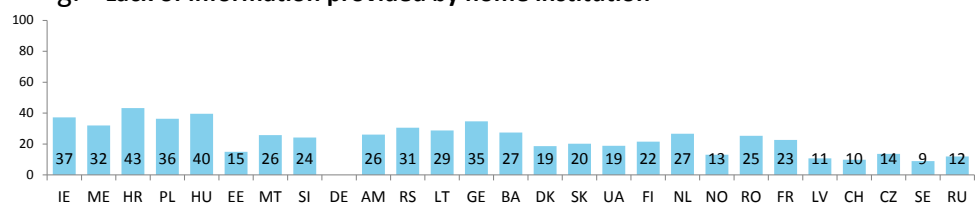
e. Difficult integration into structure of home study programme



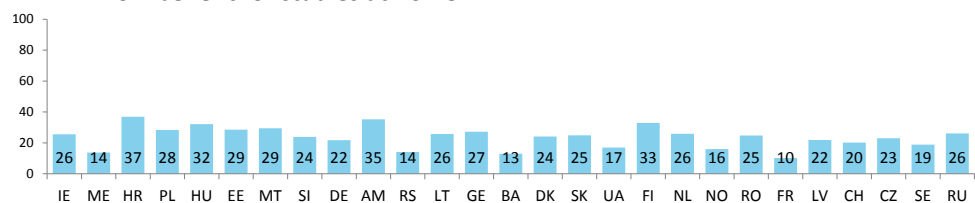
f. Lack of motivation



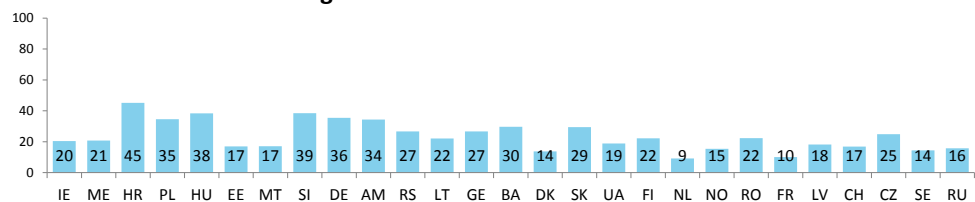
g. Lack of information provided by home institution



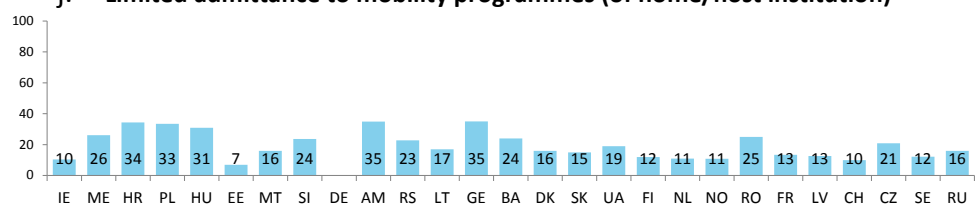
h. Low benefit for studies at home



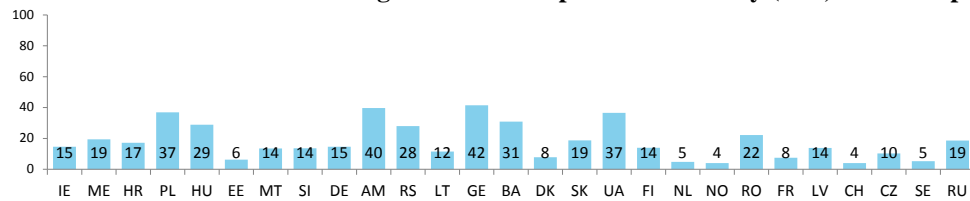
i. Problems with recognition of results achieved abroad



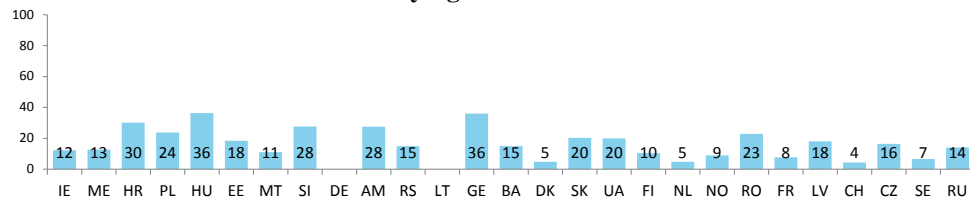
j. Limited admittance to mobility programmes (of home/host institution)



k. Problems with access regulations to the preferred country (visa, residence permit)



l. Insufficient marks for studying abroad

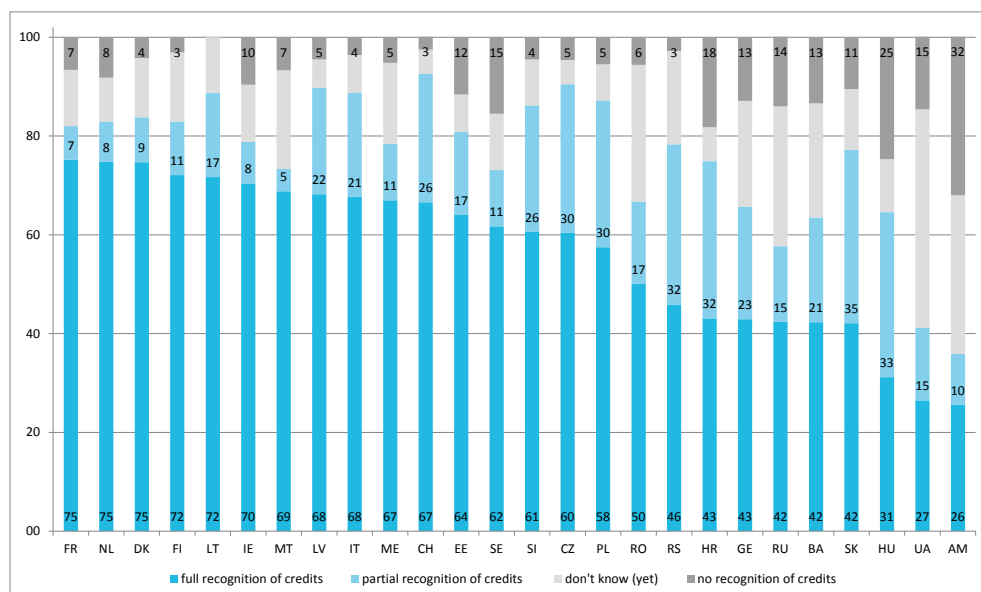


Data source: EUROSTUDENT V, K.15. **No data:** AT, IT. No data for “lack of information provided by home institution”: DE. No data for “lack of motivation”: RO. No data for “insufficient marks for studying abroad”: DE, LT. No data for “limited admittance to mobility programmes”: DE.

Eurostudent has conducted a survey regarding recognition issues. Figure 7.31 presents the recognition of credits (ECTS, certificates) that students have gained abroad after being temporarily enrolled abroad and returning to their home institution. Full recognition of credits seems to be the tendency among the countries where data is available, although great differences between countries emerge (from 26 % of student who have been enrolled abroad in Armenia to 75 % in France, the Netherlands and Denmark). Nevertheless, the share of students who do not get any recognition of credits is relatively high in some countries (Armenia, Hungary, Croatia and Sweden).

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 ECTS and learning outcomes (within the National Qualifications Framework) would also help in the recognition of credits.

Figure 7.31: Recognition of credits gained during (most recent) enrolment abroad - Share of students who have been enrolled abroad (in %)

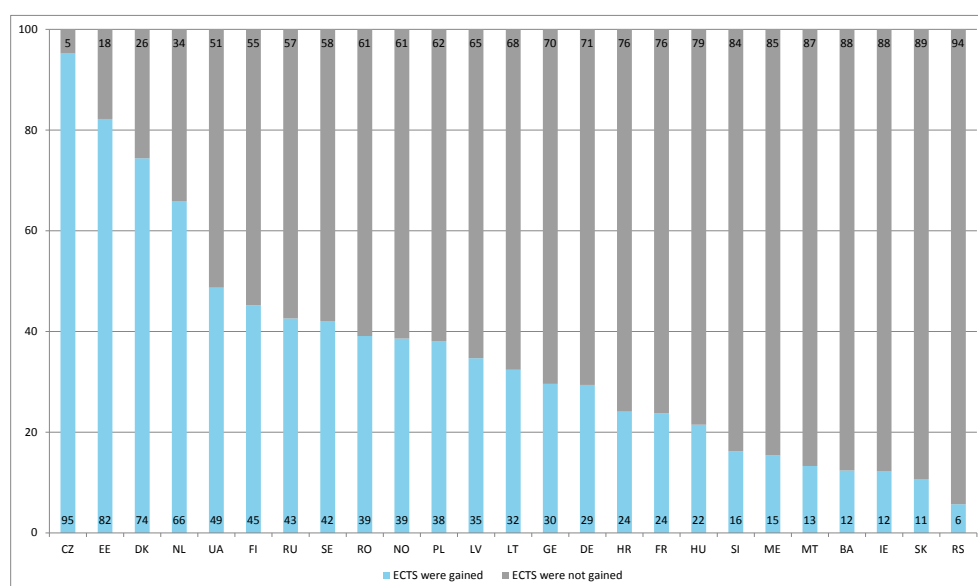


Data source: EUROSTUDENT V, K.8. **No data:** AT, DE, NO.

Figure 7.32 shows the recognition of credits (ECTS, certificates) that students gained after having spent a period abroad for study-related activities, such as internships/work placements, language courses, research stays, summer schools, etc. Again, significant differences emerge between countries (from 6 % of student who have experienced study-related activities abroad in Serbia to 95 % in the Czech Republic).

The results from Eurostudent survey regarding recognition show that there is still room for improvement. As recognition is an obstacle to mobility for some students and may lead to longer studies as well as additional costs, it will be important to address this issue in the future.

Figure 7.32 : Attainment of ECTS for study-related activities abroad (other than enrolment) - Share of students who have been abroad (in %)



Data source: EUROSTUDENT V, K.20. **No data:** AT, IT CH.

7.2.1.5. Measures to support student mobility

Countries in the EHEA implement a range of measures in order to foster mobility and tackle obstacles that prevent students from being mobile. Some obstacles such as the re-organisation of programmes and strengthening of information provision can be perhaps addressed more easily – provided that there is the 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 national or European levels.

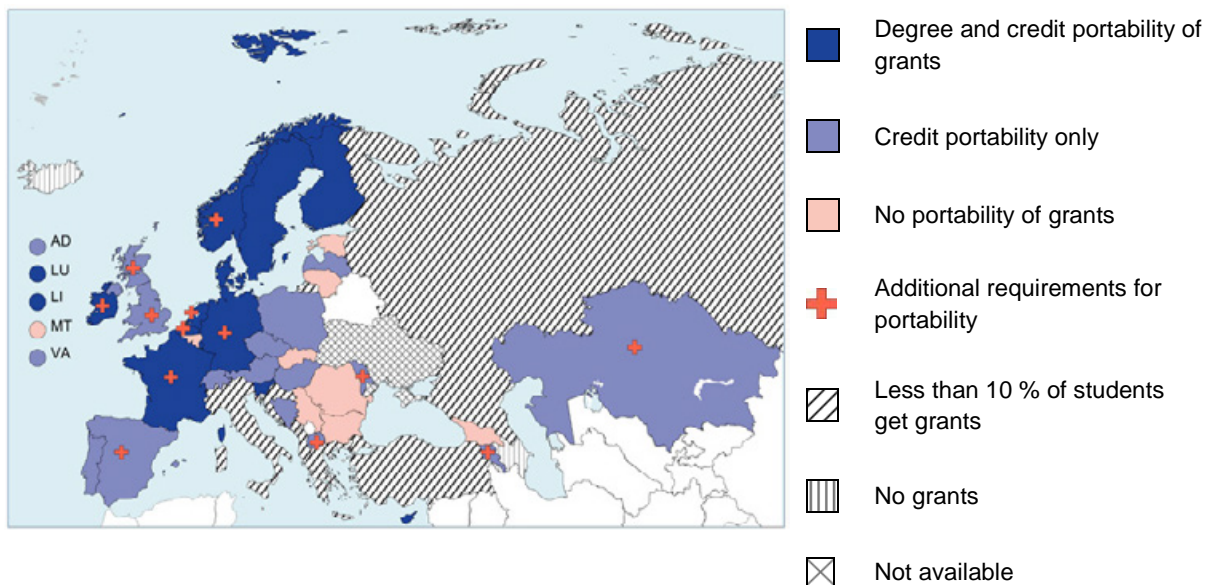
Financial support: Portability of grants and loans

As the lack of funding seems to continue to be a major barrier to student mobility in almost all EHEA countries, it is vital to give much attention to this issue. The portability of grants and loans ⁽³⁴⁾ is a key element to address this issue in ensuring students equal access and mobility opportunities. 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.

⁽³⁴⁾ 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.

Figures 7.33 and 7.34 below illustrate the main characteristics of portability of grants and loans across the EHEA. In this regard, this section distinguishes between credit portability (portability of grants or loans for credit mobility) and degree portability (portability of grants or loans for degree mobility). Furthermore, 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 that can be spent abroad, or the requirement that students need to study full time. The most severe restriction is when students can only take 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'.

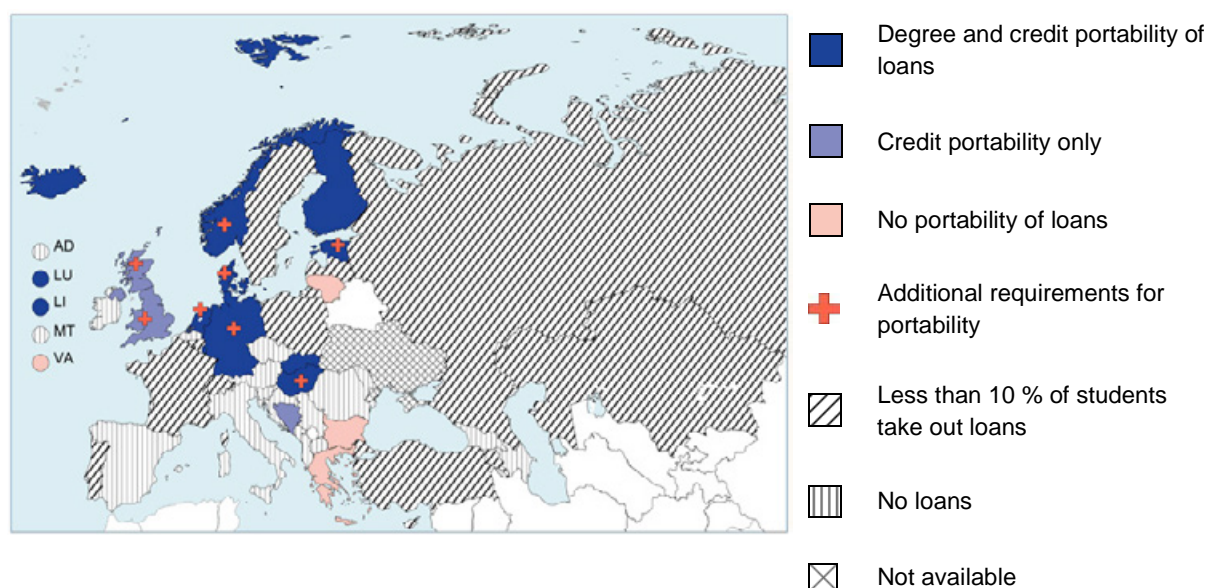
Figure 7.33: Portability of grants, 2013/14



Source: BFUG questionnaire

In almost three quarters of education systems in the EHEA, grants are portable for either degrees or credits taken abroad. However, portability of grants is far more common for credit than for degree mobility. Similar patterns can be seen with regard to loans, although there are fewer countries offering publicly subsidised loans as part of the student support system. Thus overall, portable loans are offered in fewer than half of the countries.

Figure 7.34: Portability of loans, 2013/14



Source: BFUG questionnaire

Cyprus³⁵, Denmark, Finland, Germany, Liechtenstein, Luxembourg, the Netherlands and Norway offer portability for degree and credit mobility, for both grants and loans, while Sweden, Ireland, the Czech Republic, France and Slovenia offer both degree and credit portability for grants only. In Andorra, Armenia, Austria, "The former Yugoslav Republic of Macedonia" and the Holy See, there is credit portability for grants only, as there is no loan system.

In many countries however, there are some additional requirements that need to be fulfilled for both grants and loans. Looking only at grants, there are additional requirements to be fulfilled in 13 higher education systems, and for portability of loans, additional requirements need to be fulfilled in Denmark, Estonia, Germany, Hungary, Norway and the United Kingdom. In Belgium (French Community), the grants are portable on the condition that the programme followed abroad is not given by any higher education institutions.

There are disparities between the EHEA countries regarding the portability of grants and loans and thus there is still room for improvement. This issue is critical and countries must go forward if they wish to increase mobility and reach the 20% mobility target.

Other financial supports

Some countries report a number of specific financial instruments in support of incoming and outgoing students. In Austria for instance, incoming mobility is encouraged by providing possibilities for student 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 plus extra funds for study abroad that can be used for degree mobility.

Belgium (French Community) provides support notably through the 'Erasmus Belgica' programme, the FAME (support fund for student mobility, targeting firstly students from lower socio-economic background) and excellence scholarships.

³⁵ Question for Cyprus: Could you please confirm?

In Germany, for outgoing mobility, the 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 BA 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.

Other measures to support student mobility

Other measures are linked to other obstacles to student mobility as presented in Figure 7.29. Recognition continues to be perceived as a significant barrier halting student mobility, and thus an issue in need of improved practice. 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 concrete 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 problem 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.

Language competency is an ultimate pre-condition for studying abroad and thus often one of the main obstacles. Consequently, around half of the countries mention 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. In Italy, for instance, the Ministerial Decree 104 of 2014 and Ministerial Decree 1059 of 2013 provide for new measures to overcome the language barrier for incoming students and, where numerous clausus is compulsory, entrance exams are conducted in English and can be sat at a distance.

In spite of introducing and enlarging programmes in foreign languages, studies at higher education institutions in a language different to the official language of the country might fall under restrictions. 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 master 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 7th November 2013 goes even further in the possibility 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 master's programme, up to 50 % (except the master's 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. Finally, higher education institutions can ask the minister responsible for higher education an exception to these rules if the programme shows an international dimension or a high scientific quality.

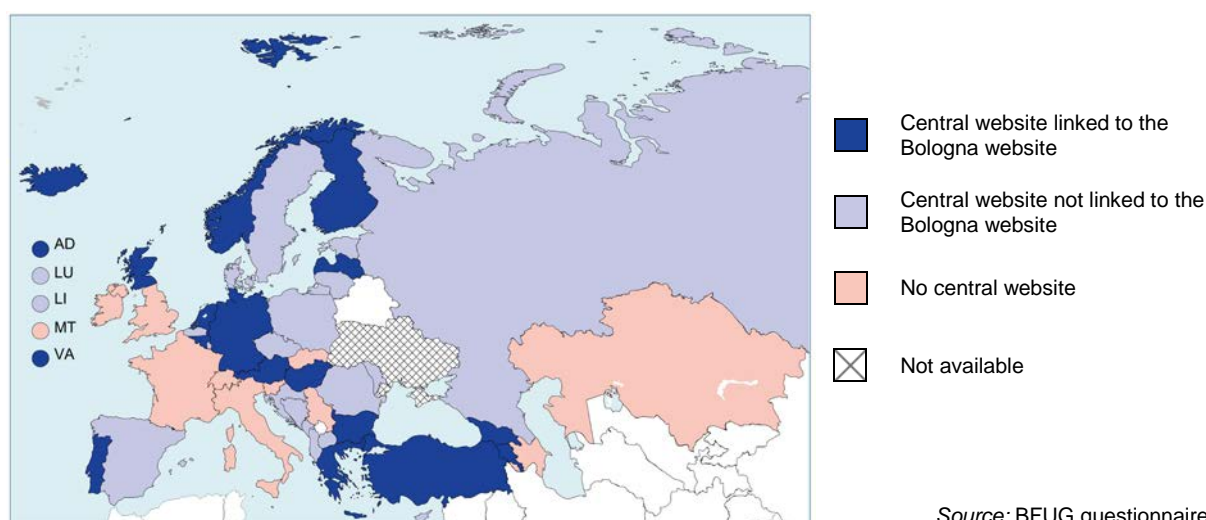
Overall in the EHEA, higher education programmes taught in widely spoken, non-native languages usually fall under the same legal regime as programmes taught in official languages. Different legal

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. Moreover, in Ireland and the United Kingdom no higher education programmes in non-native languages are being offered.

Improving the information on and the promotion of student mobility opportunities are crucial actions to undertake in order to tackle obstacles link to the 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.

Moreover, 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.

Figure 7.35: Existence of a central website with information about all mobility schemes for national and international students, 2013/14



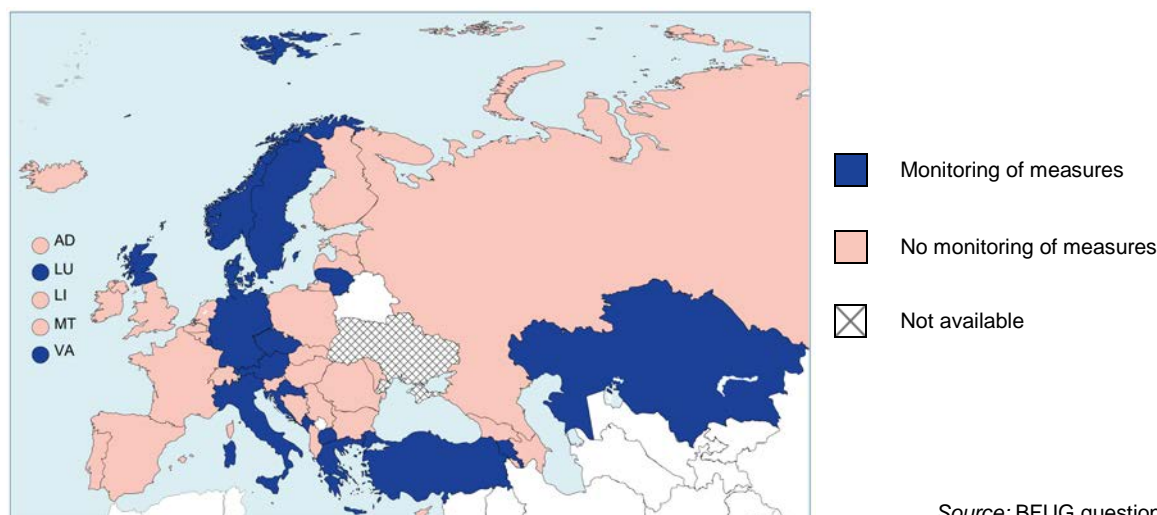
Source: BFUG questionnaire

Finally, some countries mention persisting legal issues including visa arrangements. Dialogue with the authorities concerned aims to improve conditions of mainly incoming non-EU students. In particular, Italy, Croatia and Latvia mention recent measures to simplify legal frameworks and visa regimes regarding incoming students. With regard to this issue, there are still efforts to do in order to optimise student mobility flows across the EHEA and beyond. Ideally, countries should adapt their visa and residence permit policies in order to align them with their engagement toward internationalisation and mobility.

7.2.1.6. Monitoring

Only around one third of all the countries that adopt programmes or measures to tackle obstacles to student mobility monitor their effects (see Figure 7.36).

Figure 7.36: Monitoring the effects of measures to tackle the obstacles to student mobility, 2013/14



Source: BFUG questionnaire

In some countries like 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 are not yet due. Countries that already undertake monitoring do so annually or biannually. Various institutions like the ministry of education or other government agency, quality assurance agencies, higher education institutions or national student unions could be involved in the monitoring process.

7.2.2. International staff mobility

Staff mobility has become an issue of increasing importance within the Bologna Process over the years. It is now considered as a key driver of internationalisation of higher education, as it contributes, with other international activities, to reinforce the attractiveness and the competitiveness of national higher education institutions. Mobile staff can also contribute to stimulate student mobility as they act as multipliers, while mobility of administrative staff can contribute to the quality of administration, management and student services. However, despite the political attention to the topic, there is still no definition of the concept of staff mobility at European level ⁽³⁶⁾.

Similarly to student mobility, staff mobility is a complex topic and several elements are 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 – from a few days to a few years), the categories of staff, that is, academic staff (mostly teachers and researchers, but to some extent doctoral candidates ⁽³⁷⁾), technical and administrative staff (including international officers and

⁽³⁶⁾ Recent deliberations of the Working Group on Mobility and Internationalisation has led to a proposed definition of staff mobility.

⁽³⁷⁾ 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.

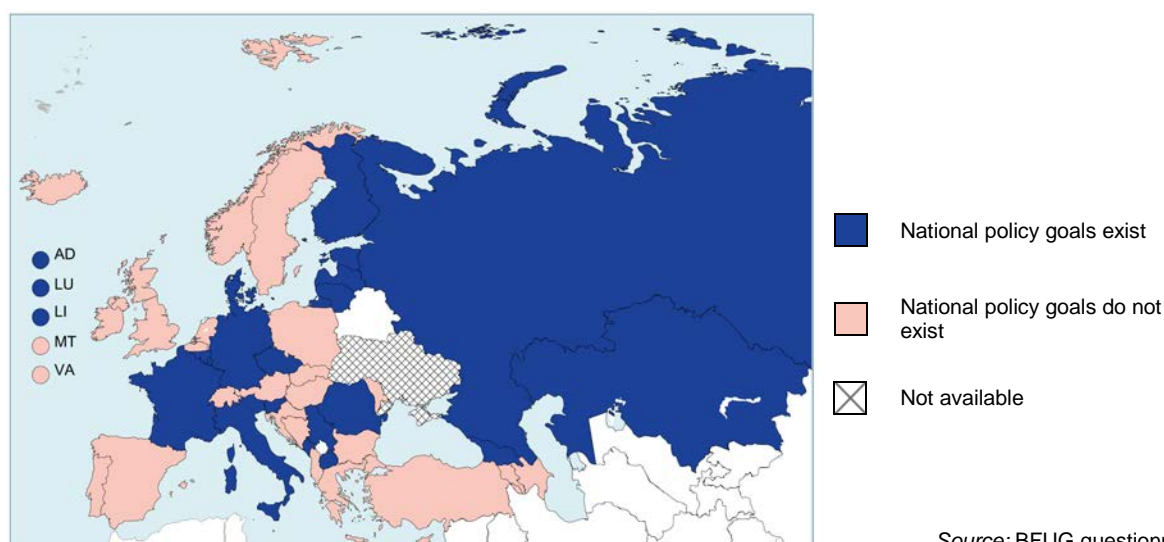
guidance counsellors, for example). In addition, the purposes of periods spent abroad are essential to know in order to categorise staff mobility. For example, academic staff may be mobile to participate in international conferences, for study visits, for periods of teaching or academic exchange, for a sabbatical with defined objectives, etc. ⁽³⁸⁾.

This part of the chapter will first examine national policies and programmes regarding staff mobility. Then it will turn to the topics of target setting and participation rates, obstacles to mobility, measures to tackle these obstacles and monitoring.

7.2.2.1. National policy goals for staff mobility

While there seems to be general policy support for mobility, including staff mobility, it appears that less than half of EHEA countries have defined any specific national policy goals that explicitly seek to promote staff mobility in higher education (see Figure 7.37).

Figure 7.37: Existence of national policy goals explicitly aimed at promoting staff mobility, 2013/14



Source: BFUG questionnaire

The national policy goals that have been reported are sometimes very general in character, for example stating in law that the mobility of students and academic personnel is encouraged. However, 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, France, "The former Yugoslav Republic of Macedonia", Lithuania, Romania, Russia and Slovenia (target setting for staff mobility will be addressed later in this section).

Other countries have developed detailed national policy goals, but without quantitative targets. For example, in the Czech Republic, the Ministry of Education, Youth and Sports has included mobility of academic staff in public higher education institutions as a priority in its Strategic Plan. This envisages programmes to support staff mobility as well as to create 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

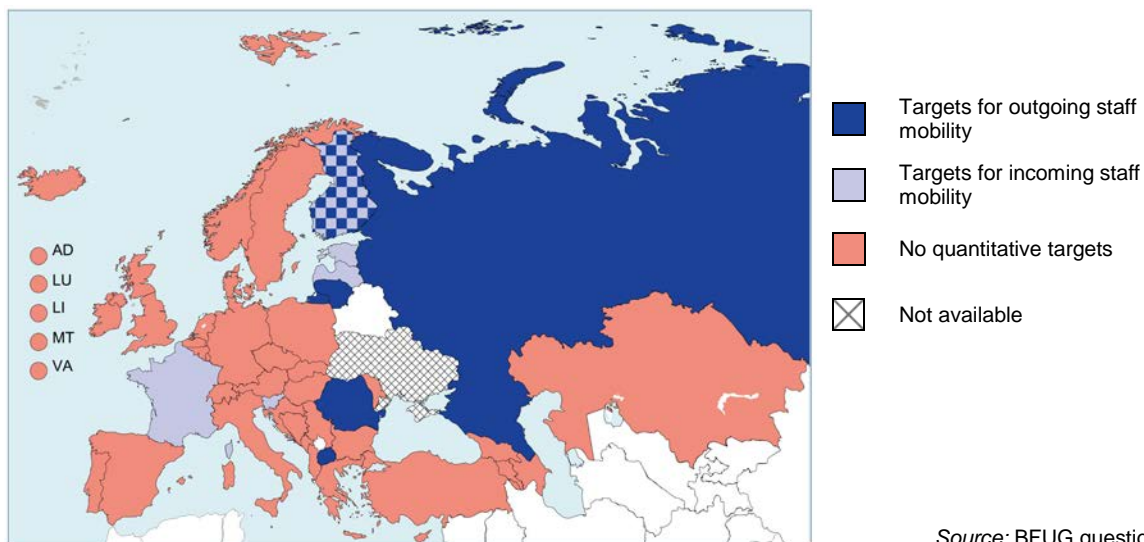
⁽³⁸⁾ EHEA, 2013. *Staff Mobility in Higher Education – National Policies and Programmes*. [Online] Available at: <http://eacea.ec.europa.eu/education/eurydice/focus-on/documents/156EN.pdf> [Accessed 26 October 2014].

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 and wider international levels. 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.).

7.2.2.2. 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 the teaching staff category or, to a lesser extent, researchers (very rarely for doctoral candidates), and 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.

Figure 7.38: Existence of quantitative targets for staff mobility, 2013/14³⁹



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 need to realise activities 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, while 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 Erasmus⁴⁰.

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-

³⁹ **Question for Spain:** Could you please confirm? In the previous Implementation Report (2012), Spain had a quantitative target for staff mobility.

⁴⁰ **Question for Lithuania, Romania:** Could you provide the current data on staff participating, so that the difference with the target becomes clear?

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, whether at national or international levels.

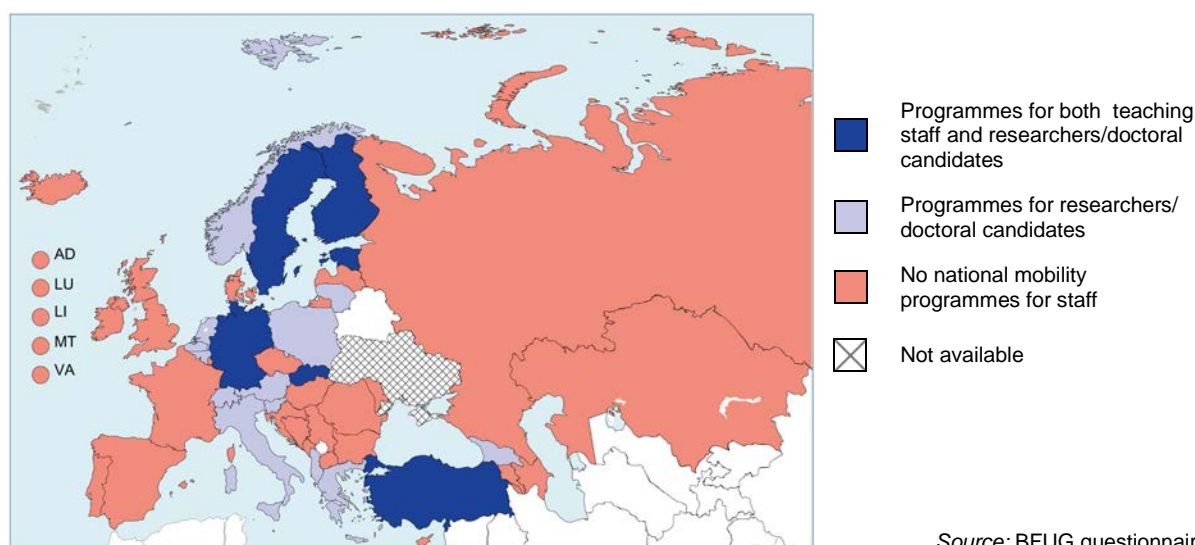
As for incoming staff mobility, Estonia aimed at reaching 3 % of foreigners in permanent teaching staff positions, while in France, the share of foreign professors or « researcher-teachers » among newly recruited staff should reach 20 % by 2015. The target in Slovenia is to include at least 10 % of foreign teachers, staff and researchers in higher education by 2020⁴¹. In Latvia, the Law on Higher education institutions stipulates that at least 5 % foreign guest professors should be teaching in higher education institutions as of September 2014 (when the data were collected the rate was 4 %).

Finland has defined targets for both incoming and outward staff mobility. The proportion of outgoing university teachers and researchers should reach 29 %, while outgoing staff in polytechnics should reach 62 % of all teacher and expert staff by 2015. For the same timeline, incoming teachers and researchers in university should reach 29 %, whereas incoming staff in polytechnics should reach 47 %⁴².

7.2.2.3. National mobility programmes for staff mobility

In some countries, staff mobility is made possible with European programmes such Erasmus + or regional programmes as CEEPUS. However, a certain number of EHEA countries, but less than half of them, have developed national mobility programmes in order to foster staff mobility (see Figure 7.39).

Figure 7.39: Existence of national mobility programmes for staff, 2013/14



In most cases, such programmes exist to support both inward and outward mobility and are designed for the mobility of researchers. These are often financed by national research councils or foundations. For example, Albania has a national programme in collaboration with the Austrian Federal Ministry of Science, Research and Economy which aims to conduct joint scientific research and plans exchanges

⁴¹ Question for Estonia, France, Slovenia: Could you provide the current data on staff participating, so that the difference with the target becomes clear?

⁴² Question for Finland: Could you provide the current data on incoming and outgoing staff mobility, so that we can understand the difference with the target

of researchers. The Swiss National Science Foundation (SNSF) with its career funding schemes focus also on researchers. 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. 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 teaching staff mobility. In Germany, various grant programmes exist for both incoming and outgoing mobility and it is the DAAD that is in charge of the administration of these programmes. In Finland, mobility of teaching staff is funded in CIMO programmes: FIRST for exchange with Russia, the CIMO China programme, North-South-South programme for cooperation with developing countries. The Finland Distinguished Professor Programme provides competitive grants to projects recruiting highly esteemed scientists, who are able to commit to long-term cooperation with a Finnish university or research institute. The Programme is financed by the Academy of Finland and the Finnish Funding Agency for Innovation (Tekes).

Beyond these examples, however, no countries have provided evidence of having national mobility programmes for other types of staff, such as administrative or technical staff. This therefore appears to be a rather neglected aspect of internationalisation efforts.

7.2.2.3. Information on participation rates

Information on participation rates in staff mobility is collected mainly with regard to mobility of researchers, teaching staff and doctoral candidates in less than half of higher education systems across the EHEA. Only a few countries report that information on participation rates are collected for administrative and technical staff.

It 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 report 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 individually 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 + and Euraxess. Overall, however, a lack of attention to monitoring participation in staff mobility appears to be a widespread characteristic of countries in the EHEA.

7.2.2.4. 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 ⁽⁴³⁾. Language knowledge was clearly the most commonly identified obstacle for both incoming and outward staff mobility.

⁽⁴³⁾ EHEA, 2012. *The European Higher Education Area in 2012: Bologna Process Implementation Report*, p. 171.

For the current report, countries were asked to rank a certain numbers of 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 perceptions.

Lack of funding now seems to be the most important obstacle particularly for outgoing mobility, followed by administrative burden, language issues and a lack of motivation among personnel. Other obstacles such as recognition and legal issues, immigration restrictions or incompatibility of pension and/or social security systems are also cited, but they are deemed to be slightly less important according to countries' perceptions. Regarding the two last topics, immigration restrictions appears to be more a concern 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 other obstacles to 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.

As for incoming staff mobility, two types of obstacles dominate: 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 reasons reported as a hindrance to incoming staff mobility. The incompatibility of pension and/or social security systems appears again to be a concern for EU countries.

Measures and programmes to remove obstacles to staff mobility

Around half of the EHEA countries report having measures and/or programmes to tackle obstacles to staff mobility. The most often cited, without distinguishing between incoming or outward mobility, 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 regarding the assistance for accompanying people (e.g. family members).

Facilitating the granting of visas is vital in the pursuit of staff mobility (as well as student mobility) and some countries have made advancements in this regard. A European initiative adopted in 2013, the European Scientific Visa, is also worth mentioning. It applies in all Schengen states, and aim 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 much 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.

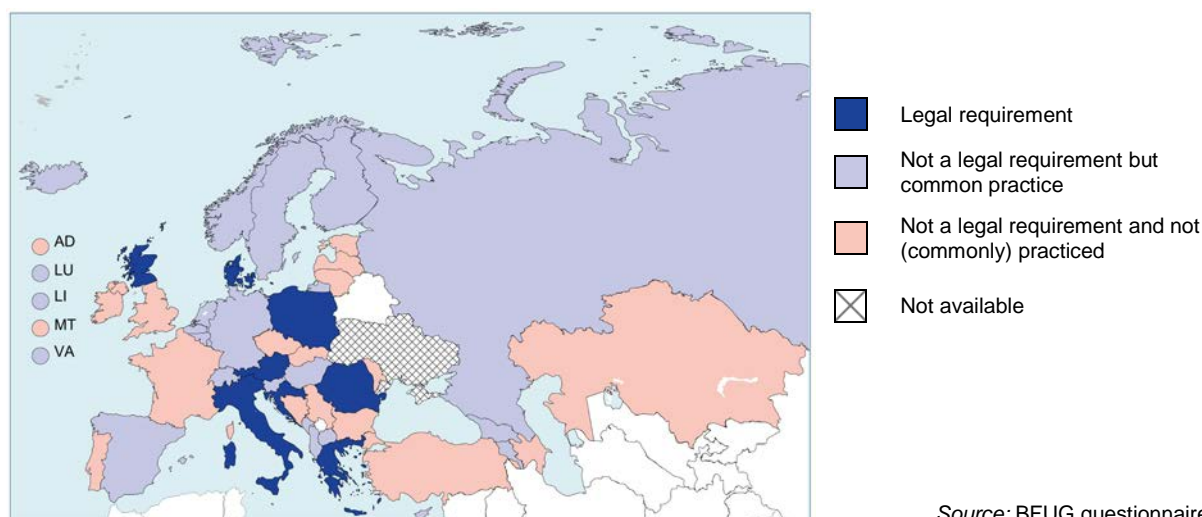
The provision of a unique website which provides information about all international mobility schemes for staff is also a way to respond to the lack of information. In the previous report, countries reported that the provision of information for employees interested to make use of opportunities to work abroad was generally insufficient ⁽⁴⁴⁾. This situation does not seem to have evolved greatly. Indeed, the information about staff mobility opportunities seems to be either inexistent or scattered in different websites. Some countries have one or several websites, but they do not cover all possibilities (incoming and outgoing mobility, all types of staff). However, there are some European websites that

⁽⁴⁴⁾ EHEA, 2012. *The European Higher Education Area in 2012: Bologna Process Implementation Report*, p. 172.

give 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 operating outside their countries is another way to promote staff mobility. It appears that it is a common practice in the majority of EHEA countries (see Figure 7.40). In some cases this is done as a legal requirement (Austria, Croatia, Denmark, Greece, Italy, Poland, Romania and the United Kingdom (Scotland)). More often, however, such publication is a common practice, without being mandatory. At the same time, almost 20 education systems report that publishing academic vacancies in foreign media is not required and would be very unusual.

Figure 7.40: Legal requirement to publish vacancies in foreign media, 2013/14



Finally, rewarding mobile staff can be another means used to remove obstacles to staff mobility. Many countries report having rewards for members of staff who participate in mobility programmes, but only a small number of countries have national systematic reward mechanisms. Indeed, individual higher education institutions are often the provider of rewards.

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.

Monitoring

Systematic monitoring of the impact of the measures/programmes to remove obstacles to higher education 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.

Reported data show that there are many things to be done at national and institutional levels to foster staff mobility. First, countries should agree on a definition and measurable parameters in order to set targets and collect data. Besides, staff mobility should be included in the internationalisation strategies and national immigration laws should support the mobility of staff (e.g. by allowing partners or family members to obtain visas, etc.). Improving the promotion of mobility opportunities is critical (especially for administrative and technical staff) and fund for institutions and agencies promoting staff mobility should be provided.

At institutional level, higher education institutions should also provide information on mobility opportunities and create a supporting environment for staff mobility by creating a culture of welcome, integrate staff mobility into career development. Staff mobility should also be embedded in a comprehensive internationalisation strategy.

Conclusions

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.

Most countries encourage the internationalisation of higher education through their steering documents. However, more than half of them 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. 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 in order 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.