EUROPEAN UNIVERSITY ASSOCIATION

TRENDS 2024

European higher education institutions in times of transition

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Foreword

The European University Association (EUA) Trends 2024 report presents the responses of Europe's higher education sector to ongoing European policy reform developments, in the context of wider societal changes.

This timely report comes at the end of a working cycle of the Bologna Process, culminating in the Tirana Ministerial Conference in May 2024. While many key commitments of the Bologna Process, such as quality assurance, degree cycles and recognition, remain on the agenda and still require attention, this is also a moment to set priorities for the future. This means (re)thinking issues of importance to higher education in view of the changes brought about by digitalisation, new formats of learning and teaching, and, more generally, the altered landscape within the European Higher Education Area (EHEA). In this context, it is interesting to see that higher education institutions (HEIs) confirm quite unequivocally the continued relevance for them of the Bologna Process and the EHEA, in addition to recognising the changes effected by the European Education Area (EEA). In particular, the European Universities Initiative of the European Union (EU) has highlighted the importance of HEIs as organisations of transnational collaboration and partnership. This has contributed to making visible the gaps in the implementation of existing policies and tools for seamless cross-border education and exchanges.

For HEIs in Europe, the five past years has been a period of change and transformation, some gradual, others more drastic and disruptive. Managing digital transformation amid and in the aftermath of the Covid-19 pandemic tested and challenged existing practices, yet at the same time provided invaluable opportunities to mainstream the use of digital tools and digitally enhanced teaching practices. Geopolitical challenges, the war in Ukraine, and the subsequent energy and economic crises in Europe have brought to the forefront questions related not only to economic and technological sovereignty, but also to integrity, solidarity and inclusiveness. HEIs are increasingly managing diverse student profiles and cohorts, leading to a reflection on what flexible learning could and should look like.

Against this background, the Trends 2024 report provides an overview of how HEIs themselves describe their situation and how they see future developments in their sector. The report analyses the institutions' perspectives with regard to their missions, current and prospective student enrolment, education offers, learning and teaching enhancement, societal outreach, international policies and more. Across the board, internationalisation and the contribution of, and engagement with, society are high priorities in institutions' current and future strategies. Another area that clearly requires continued attention is the development of non-degree short education provision; this calls for a reflection on the complementarity of degree and non-degree education in higher education, and on the role of universities in lifelong learning more broadly. While issues of university autonomy and student and staff participation were addressed in previous Trends reports, the current document also addresses for the first time the wider question of values.

In conclusion, Trends 2024 explores and analyses in detail many of the issues identified in EUA's *Universities without walls* document (EUA, 2021), which sets out a vision for the sector in 2030. It provides some answers, but, crucially, it also raises new questions. At a time when these issues need to be addressed through varied and complementary lenses, we hope that this report will be useful for HEIs, as well as for policy makers and researchers. EUA looks forward to continued dialogue on future developments in the EHEA and EEA, and at national policy levels.

Amanda Crowfoot
Secretary General

Acknowledgements

First and foremost, EUA is most grateful to the colleagues at the 489 higher education institutions who responded to the Trends 2024 survey. The questionnaire was long and encompassed many different topics, some of which probably required internal consultation within your institutions. Thank you for your effort and commitment.

We would like to thank the members of the EUA Learning & Teaching Steering Committee for their advice on the first draft of the Trends 2024 questionnaire.

EUA friends and partners contributed to the dissemination of the questionnaire, thus supporting our endeavour to gather perspectives from a broad range of higher education institutions in Europe. In this regard, we would like to express our gratitude to colleagues at the Association Européenne des Conservatoires, Académies de Musique et Musikhochschulen (AEC), the European Association of Institutions in Higher Education (EURASHE), the Coimbra Group, the Young European Research Universities Network (YERUN), the European University Foundation (EUF), the Network of Universities from the Capitals of Europe (UNICA) and the Académie de Recherche et d'Enseignement supérieur (ARES) in Belgium, as well as in the European university alliances ARQUUS, Circle U, ECIU and YUFE. Thanks should also go to our national rectors' conferences, which supported the dissemination of the survey to ensure as much as possible a large, but also representative and geographically balanced, response sample.

As the Trends 2024 data collection and the preparation of this report coincided with that of the Bologna Process Implementation Report, we would like to thank David Crosier and Daniela Kocanova from the Eurydice office of the European Commission's Education, Audiovisual and Culture Executive Agency (EACEA) for the fruitful exchanges. We are grateful to have had the opportunity, once again, to share Trends 2024 data, especially on the topic of learning and teaching, in the corresponding chapter of the 2024 Bologna Process Implementation Report that Eurydice produced.

We would like to thank our colleagues at EUA for their expertise on specific points explored in this report. The first version of Trends 2024 data was also presented at an internal EUA meeting, and the feedback received was helpful for structuring data analysis.

The Trends 2024 study is the result of a collective effort. At EUA's Higher Education Policy Unit, Henriette Stoeber compiled the data, provided the longitudinal analysis and ensured data accuracy throughout the report, in addition to supporting the drafting process. Her contribution was key to Trends 2024. We also thank Raphaèle Fischer-Angoulvent for their administrative support, and Theodora Famprikezi, former Project & Policy Officer at EUA, for her contribution to the first drafts of the Trends 2024 questionnaire.

Finally, thanks go to colleagues in EUA's Communication Unit, in particular to Inès Mezher, who conducted the design process for the report.

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Executive summary

Like its predecessor reports in the Trends series, Trends 2024 provides an institutional perspective on the development of, and in, the European Higher Education Area (EHEA). It explores how higher education institutions (HEIs) relate to policy actions and priorities, as well as to other major political, societal and economic developments. It provides an overview of the state of play at HEIs, the policies and actions they undertake, and the challenges they encounter, notably in the areas of education, service to society, values, equity, diversity and inclusion (EDI), and internationalisation.

Chapter 1 – The Trends 2024 survey

- **Methodology:** The Trends 2024 online survey was open between April and July 2023, and collected a response from 489 HEIs in 46 higher education systems of the EHEA. The questionnaire addressed major changes and their impact, with a focus on the past five years (since Trends 2018 was published) and the institutions' prospects for the next five years. Comprehensive universities made up the largest group of the sample, which also comprised technical and specialised universities, universities of applied sciences, music and art schools, and open universities.

Chapter 2 – European, national and institutional strategies and reforms in times of change

- **Europe matters:** Over 98% of HEIs find the Erasmus+ programme of the European Union and the Bologna Process highly important. Other European policies and initiatives attract slightly less interest, but still count as important to institutions. Interestingly, there is no major difference between institutions in EU member states and those in the rest of the EHEA.
- **Importance of national reforms:** About two thirds of institutions across Europe confirm the importance of national reforms in the areas of quality assurance, digitalisation, internationalisation, institutional funding, research policy, and learning and teaching. All but 5% of HEIs are involved in the development of system-level strategies and reforms, usually via consultations. For 44% of institutions, national reforms set the direction, whereas the implementation lies with the institutions themselves. About a quarter of HEIs see themselves as initiators of at least some system-level strategies and reforms.
- **Issues impacting institutional strategies:** Digitalisation, the Covid-19 pandemic, enhanced inter-institutional cooperation, greening and the United Nations Sustainable Development Goals (SDGs), and economic developments are the top five issues that have impacted institutional strategies since 2018. Other changes, such as political changes, geopolitical challenges, migration and demographic change, have had some impact on some university strategies, with considerable country differences. One issue that represents a serious threat is underfunding, at a time when HEIs face increased responsibilities to respond to multiple changes and challenges in their environment. Forty-four per cent of institutions report either continuously low or decreasing funding over the past five years, while 70% of HEIs identify underfunding as one of the top three obstacles for improving learning and teaching.
- **Impact of the Covid-19 crisis and post-pandemic changes:** Some 40% to 66% of institutions confirm enduring changes in their education offer, on various aspects such as online and blended learning, and their institutional organisation. But the most profound change, happening at two thirds of institutions, is the increased attention on students' wellbeing and mental health; about half of institutions make the same point for their staff.

- **Digital preparedness – better, but not good:** Over 90% of institutions have policies in place for ethics, integrity and data protection, and access for disabled students. But digital resources and infrastructure require more attention and investment. Institutional attention to artificial intelligence and blockchain is increasing, but institution-wide approaches are not yet widespread.

- **Greening and environmental sustainability:** Some 72% of institutions have a strategy in place, which not only represents an increase compared with 61% in 2021, but also suggests a more holistic approach, both within the institution and towards society.

- **Attention to fundamental values:** The majority of institutions report good and even enhanced respect for the values defined and highlighted in the Bologna Process. But some also report low and decreasing attention on academic freedom (11% of HEIs), academic integrity (8%) and institutional autonomy (26%), as well as on the participation of students (11%), the participation of academic (8%) and administrative staff (13%), and the participation of external stakeholders (9%). While most institutions assess the situation of student and staff participation positively, there seems to be growing awareness of the scope for enhancement of participatory institutional cultures beyond granting formal rights.

- **Growing support and demand for academics and students at risk:** Most institutions have a relevant policy in place for students (57%); of which 73% host students at risk or have done so in the past. Moreover, 34% have a policy in place for researchers at risk; of which 64% currently host such researchers or have done so in the past.

- **Collaboration with Ukraine:** Two out of three institutions host Ukrainian students, about half of them under special conditions (reduced fees, support grants, etc.), and 41% host academic staff from Ukraine. Importantly, institutions in the EHEA have enhanced existing collaborations and established new ones with Ukrainian partners.

- **Decreased exchanges with Russia and Belarus:** As a consequence of the war, most institutions have discontinued or reduced their collaboration with Russian and Belarusian institutions, resulting in diminishing numbers of incoming students and staff. However, exchanges among individual academics seem to be continuing.

Chapter 3 – Higher education missions

- **Valuing and linking missions:** Most institutions surveyed under Trends 2024 perceive research and education as equally important missions, with concrete measures to interrelate them – such as including research experience in master's and bachelor's programmes. In addition, the third mission (service to society) and internationalisation are highlighted as important areas for engagement, followed by innovation, industry collaboration, sustainable development and equity, diversity and inclusion. Two thirds of institutions see the third mission as a strategic priority that is on the rise, though they point to related challenges, such as underfunding, understaffing, the lack of recognition for their action, and increasing performance pressure from external partners.

- **Enhancing the education mission:** The majority of institutions provide teacher training and support exchanges and collaboration among teachers. There is also a growing trend towards the development of new and the enhancement of existing learning and teaching centres. About two thirds of institutions have such centres already in place, in some countries much more commonly than in others. While a majority of institutions confirm that teaching is taken into account in career assessment, at many it still plays a minor role compared with research. Student feedback surveys are the most commonly used means of assessing teaching. But generally, institutions confirm the need to improve and diversify teaching assessment approaches, and almost half of them already use teaching portfolios combining different instruments.

- **Equity, diversity and inclusion:** In line with European policies, almost all HEIs perceive EDI to be a major priority. Most have established strategies and policies, and concrete measures through student and staff policies have increased over the past five years. Challenges lie ahead: HEIs point to insufficient funding, and to concerns over addressing EDI with superficial and insufficient measures instead of taking EDI as an opportunity and installing a holistic approach geared towards quality and excellence in education.

Chapter 4 – Students at the centre

- **Growth in domestic student numbers, but not in all higher education systems:** The majority of institutions report growing or at least stable student numbers in the past five years. However, in several countries, a higher proportion of institutions have experienced decreases in the number of bachelor's and, to a lesser extent, master's students. In particular, HEIs in Central and Eastern European countries project a decrease in their domestic student numbers, a trend that is confirmed by the 2024 Bologna Process Implementation Report.

- **Continued increase in the number of international and mature students:** Over recent years, the student population has become more diverse due to rising numbers of international students at most institutions and increased or stable numbers of mature learners. HEIs in most EHEA countries expect this trend to continue, and most HEIs have strategies in place for international student recruitment.

- **Learning outcomes implemented at most institutions, but to different degrees and with notable country differences:** Learning outcomes are fully implemented for all courses across the entire institution at 71% of HEIs, and for some courses at another 18% of HEIs. These numbers suggest a stagnation since 2018. There are noticeable differences between countries, with some countries where learning outcomes are the norm at all institutions, and others where implementation is mostly partial and not for all courses at HEIs.

- **Matured institutional practices in the use of learning outcomes:** Compared with 2018, the majority of HEIs seem to face fewer problems in implementing learning outcomes, as they have either solved such problems, or do not recall having had any. Interestingly, institutions with partial implementation of learning outcomes are more likely to face problems than those that have fully implemented them. However, even HEIs in matured systems where learning outcomes have been fully implemented still face some issues, though probably different ones to those encountered during the phase of introducing learning outcomes. This might explain why the most persistent problem is insufficient resources for supporting staff in learning outcome implementation.

- **Increased demand for and use of blended learning, with study remaining campus based:** Students are mostly back on campus: on average, 79% of students in the EHEA study with a physical presence on campus, 9% study off campus, and 12% combine the two. But students' and staff's demand for blended learning is reported to have increased, and the meaning of studying on campus may have changed since the pandemic. It can encompass a mix of study modes, from physically attending a class to online learning undertaken at campus facilities.

- **Increase of flexible learning offers at some institutions, but decrease in the share of institutions offering it:** By 2018, 80% of surveyed HEIs in the EHEA had already seen a need for more flexible provision for degree programmes. Over half of institutions now report an increase in their flexible learning offer over the past five years. However, the share of institutions granting flexibility through concrete steps in learning and teaching has slightly decreased since 2018. The most common way to offer flexibility is through optional courses, and most institutions also allow students to revise their choice during their studies, and grant flexibility in their time-to-degree.

- **Employability measures in place at most institutions:** Almost all institutions have measures in place to support students' employability: guidance and counselling services, job and career fairs, recruitment events, work placement and internship opportunities, integration of transferrable skills and entrepreneurship into curricula, and/or creation of incubators for student start-ups. Data suggests that compared with the bachelor's graduates themselves, HEIs are much more optimistic regarding students' preparedness for the labour market.

Chapter 5 – The rise of non-degree education

- **Considerable differences among higher education systems in the institutional take-up of non-degree education:** Some 70% of HEIs offer non-degree education and a further 21% plan to do so. In some EHEA countries almost all institutions offer it, while in others fewer than half of HEIs do so.

- **Micro-credentials continue to be popular, but not without challenges:** Micro-credentials are high on the European and national policy agendas, and are popular with institutions. In the Trends 2024 survey, 75% of HEIs perceive them as a great opportunity to innovate, diversify and enlarge their education offer, and to address inclusion. Between half and two thirds of institutions also identify challenges, mainly resulting from the lack of frameworks and processes for the development of micro-credentials: there are difficulties in defining the format and design of courses, the status of learners, the establishment of funding models, recognition, and other legislative or regulatory issues. For most institutions it is also too early to predict the usefulness and impact of micro-credentials. HEIs are somewhat concerned about overly high expectations and rising external pressures to engage more with micro-credentials, especially considering the persistence of legal, transparency and compatibility issues at higher education system level.

- **MOOCs replaced or redefined:** With just over a quarter of HEIs offering them, Massive Open Online Courses (MOOCs) seem to have stagnated, if not declined. The reasons may lie with the inclusion of more blended learning in curricula and the availability at institutions of a wealth of other non-degree courses, some of which can be taken online. MOOCs, once the sole driver for exploring digital learning innovation in higher education, may become a more profiled and strategic means for outreach, knowledge-sharing and institutional promotion.

- **Non-degree learning is growing, in both learner numbers and importance:** Half of institutions expect an increase in enrolment in non-degree education in the next five years, and another 25% anticipate at least stable numbers. This calls for increased capacity building and organisation, such as defining learners' enrolment status, recognition processes, and, in particular, the recognition of prior learning (RPL) for non-formal and informal learning, which only 21% of HEIs use for admission. The growing engagement in non-degree education offers, in terms of the number of courses and learners, calls for a reflection on its complementarity with degree education offers – and, ultimately, on the role of higher education in lifelong learning.

Chapter 6 – International exchanges and collaboration between institutions

- **Internationalisation remains a high priority, including because of its European setting:** Internationalisation continues to be a high priority for European HEIs, in a context where it is inspired and supported by policy reforms, instruments and funding, in the frameworks of the EEA, the European Research Area (ERA) and the EHEA.

- **Credit mobility has increased, but is affected by known and increasing challenges:** Until the pandemic, most institutions experienced rising or at least stable credit mobility rates. While only half of institutions were back at pre-pandemic rates in 2023, most of them still predict increasing numbers for mobility in the future. However, the Bologna Process benchmark of 20% of graduates having a mobility experience is still in the far distance. As obstacles to mobility, most institutions point to the lack of funding, the lack of sufficient fellowships in both number and cost coverage, but also the rising costs and the shortages of affordable accommodation. Recognition continues to pose problems at all but 18% of institutions, but at most institutions for fewer than 10% of mobile students. In addition, institutions face problems in fitting mobility into degrees, both in specific disciplines (69%) and generally in bachelor's programmes (49%), and even more in master's programmes (53%). All this illustrates that the Bologna Process reforms have not yet been fully implemented everywhere, and that Erasmus+ rules are not followed consistently. This should set the agenda for actions to reach the benchmark of 20% of graduates having a mobility experience, while also considering the general changes in internationalisation.

- **More mainstreamed virtual exchanges:** The Covid-19 crisis turned virtual exchanges into a more mainstreamed form of higher education internationalisation, which had previously relied almost exclusively on physical mobility. Under the influence of the Covid-19 crisis, Erasmus+ made blended mobility – a combination of virtual exchanges and physical mobility – eligible. Between 2020 and 2023, this led to a major increase in the use of virtual exchanges, from 12% to 54% of institutions, with another 20% planning to introduce them. Institutions perceive virtual exchanges to be a useful supplement to physical student mobility and an alternative for students who cannot or do not want to spend longer periods abroad. Formats, workload, organisational and legal issues are still causing problems.

- **Staff mobility as a priority, but with no systematic approach to it:** Staff mobility is an increasing priority for institutions, with only 14% stating that it is not, and 57% of institutions dedicating efforts to improving their approaches. Compared with student mobility, staff mobility is probably still approached in a less systematic way, as it has its own dynamic resulting from research and teaching collaboration. This might change if the strong emphasis on transborder institutional collaboration, expressed in various institutional and policy contexts, for example the European Strategy for Universities, is to continue.

- **Towards sustainable and effective models for inter-institutional collaboration:** Joint programmes and joint degrees have existed for almost two decades. About half of institutions surveyed under Trends 2024 currently offer joint programmes and joint degrees – but usually only in small numbers, with each benefitting a relatively small number of students. They have become a high priority for European and national policy makers and institutions to boost and mainstream structured transnational education provision. Overall, institutions are quite positive regarding joint programmes and degrees, despite the complexity of the matter and the effort it entails for institutions. It will be important to map and analyse the feasibility and development potential. Joint education provision also entails collaborative activities in areas such as virtual exchanges, staff development, and strategic innovation in learning and teaching.

- **Strategies and capacities for internationalisation:** Across Europe, almost three quarters of institutions (72%) have structures and resources in place for a systematic approach in their international activities. However, one fifth of HEIs suffer from a lack of staff resources, with notable differences between countries. Overall, what is at stake is a reconceptualisation of internationalisation, in the context of new formats and means for internationalisation, changing demands and conditions notably influenced by targeted European and system-level policies, and the impact of broader trends (such as geopolitics, greening, technological development, and economic and social changes).

Chapter 1

The Trends 2024 survey

1.1. AIMS

For more than 20 years, the European University Association (EUA) and its predecessor organisations[1] have published the Trends report series to provide reliable data from the perspective of higher education institutions on the impact of the Bologna Process reforms and the situation in institutions. A first edition in 1999 followed up the Sorbonne Declaration and provided an input for the then-called Bologna Forum, which resulted in the signing of the Bologna Declaration.

Trends 2024 is the ninth edition of the series. After the 2015 and 2018 reports had focused on learning and teaching, Trends 2024 has reprised its ambition to provide a broad overview of changes and challenges in the EHEA. It comes at a time when such an outlook is much needed, following a disruptive pandemic that has changed and challenged the way institutions operate, with Russia's war against Ukraine continuing, and in a time of digital, environmental and economic transitions. In this context, the higher education sector is expected to play its role and contribute through its education, research and service to society missions. Moreover, the years 2018–2024 have been particularly productive in terms of EU policies and initiatives on higher education, resulting notably in increased attention to micro-credentials and the European university alliances, with a renewed emphasis on transnational cooperation in higher education and changed dynamics in the field of internationalisation.

1 EUA is the result of a merger in 2001 between the Association of European Universities and the Confederation of European Union Rectors' Conferences. For further information about past Trends reports, see https://www.eua.eu/issues/10:bologna-process.html#sec-trends-reports

How would HEIs themselves define their priorities, challenges and operational capacities? In an attempt to grasp the multiple and diverse responses to these developments from the EHEA higher education sector, Trends 2024 has collected information directly from institutions and analysed it within a comparative perspective.

1.2. THE TRENDS 2024 QUESTIONNAIRE

The Trends 2024 data is based on a survey conducted from April to July 2023.

Institutions participating in the survey were invited to provide comprehensive information on:

- **the institution and its context:**
  - its profile, primary missions and priority areas
  - societal developments and possibly disruptive changes that have impacted its strategy, as well as internal policies developed and implemented
  - the importance of European and national-level strategies, initiatives, funding programmes and reforms
  - the level of participation of staff and students in the governance of the institution, as well as the participation of the institution in national reforms
  - the progression or regression in relation to fundamental values;
- **the student lifecycle and experience:**
  - the evolution of student populations in the past five years and predictions for the next five years, as well as recruitment strategies in place
  - measures to address flexible learning and the employability of graduates
  - the state of play for non-degree, shorter education offers;

- **learning, teaching and teachers:**
  - measures to support the connection between the research and education missions
  - the implementation of learning outcomes
  - the ratios of students in different study modes
  - support measures and structures in place for enhancing teaching
  - the role of teaching in promotion and career progression;
- **equity, diversity and inclusion:**
  - general trends and developments at institutional level
  - inclusion policies and measures;
- **engagement and outreach with society and community:**
  - general trends and developments at institutional level, areas of activity
  - strategies for the green transition and environmental sustainability;
- **internationalisation:**
  - general trends and developments at institutional level
  - the situation and evolution of student mobility, and associated challenges
  - recognition-related issues
  - virtual exchanges and related challenges
  - the state of play for joint programmes and joint degrees
  - the situation of staff mobility
  - specific measures in place with regard to the war in Ukraine.

A full version of the Trends 2024 questionnaire can be found in Annex I.

1.3. THE SURVEY SAMPLE

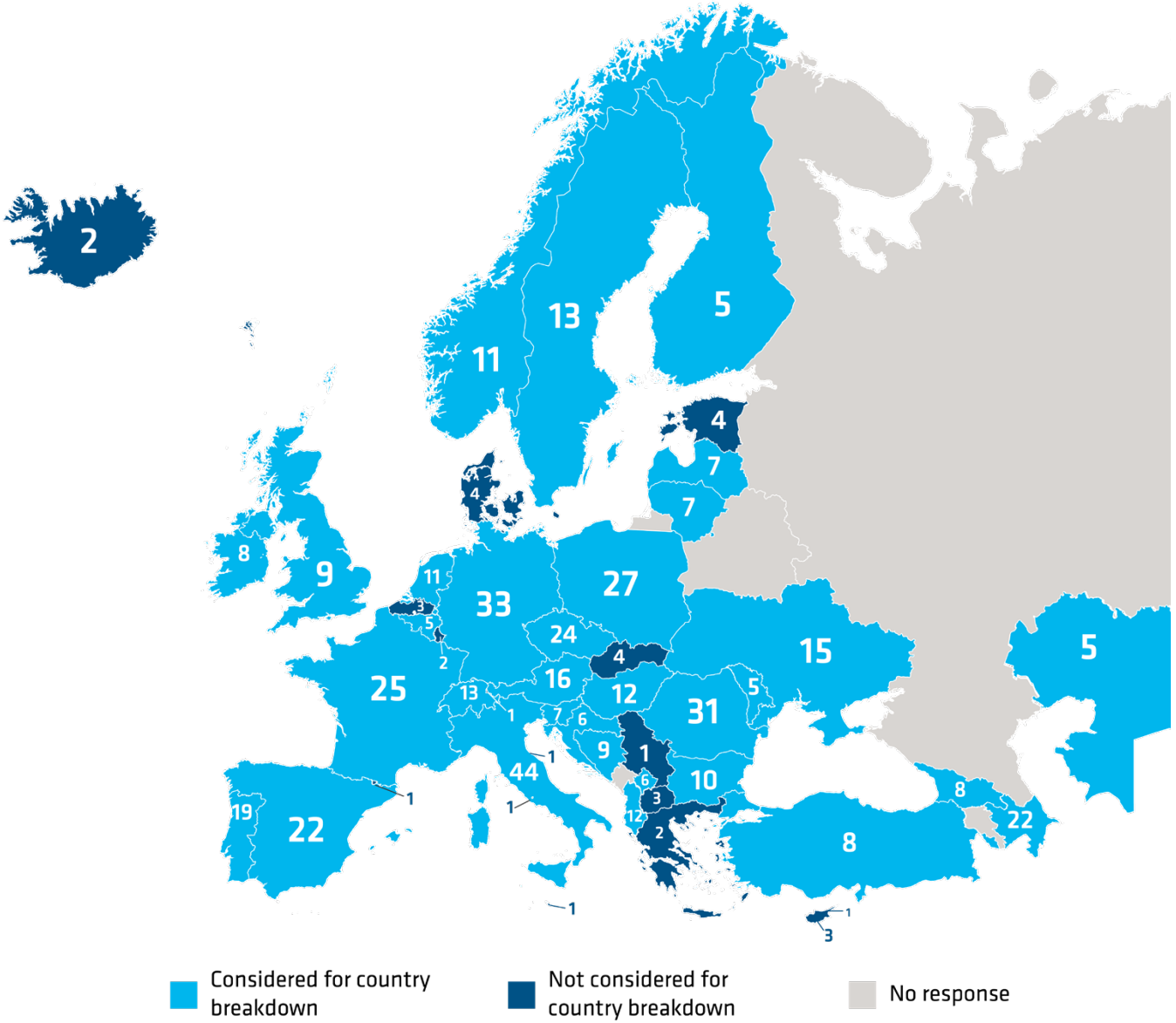
The Trends 2024 survey collected a total of 489 responses from higher education institutions in 46 systems[2] across the EHEA. Only one response per institution was collected, for which a senior institutional representative was asked to take responsibility.

The country with the highest number of responses was Italy (44 responses), followed by Germany (33), Romania (31), Poland (27), France (25), Czech Republic (24), Azerbaijan (22) and Spain (22).

2 The term "higher education system" refers to countries, as well as to regions within countries where the competence for higher education is devolved and autonomously managed. For instance, Belgium is one country with three systems (the Flemish Community, the French-speaking Community, and the German-speaking Community).

Figure 1: Trends 2024 survey participants by country

Q3. Please select your country/higher education system and institution from the drop-down menu below. N=489.



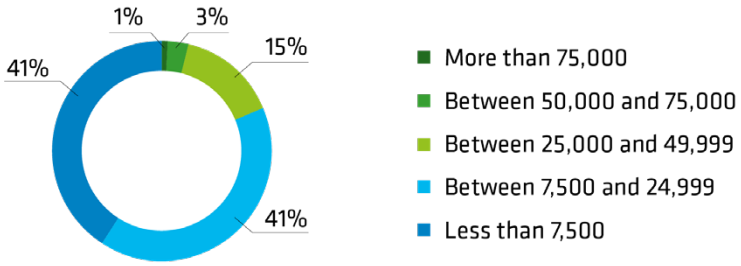
In the analysis of responses, only higher education systems with five or more participating institutions were considered for the country breakdowns, i.e. when data from the overall sample is compared and aggregated into system-level results. Trends 2024 offers specific data for a total of 32 of the 46 higher education systems (Figure 1).[3] Differences at system level were further analysed and are cited in the report when they varied by more than 15% of the average response for the full sample.

The survey was open to any higher education institution in the EHEA that offers bachelor's, master's or doctoral degrees. Only very few institutions in the sample do not offer master's degrees (3) or doctoral degrees (17). The majority of the institutions participating in the Trends 2024 survey are comprehensive, multidisciplinary universities (57%); 18% are specialised universities and 12% are universities of applied sciences or university colleges. The survey also collected responses from technical universities (8%), from higher music and art schools (5%), and from three open universities (0.6%).[4]

Compared with previous Trends surveys, the share of small institutions (up to 7,500 students) is significantly higher (40%, compared with 23% in 2015 and 28% in 2018). Most of these are specialised institutions, though a third of them are comprehensive universities. By contrast, the share of large institutions (more than 25,000 students) was higher in previous years (19%, compared with 25% in 2015 and 29% in 2018).

Figure 2: Size of participating institutions in student numbers

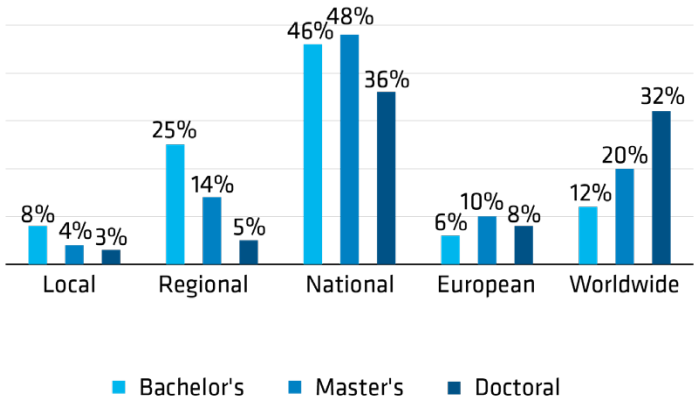
Q4. What is the approximate number of students enrolled at your institution? Please select the applicable range from the list below based on the total number of students (head count) enrolled in the 2022/23 academic year. N=489.



The majority of responding HEIs perceive themselves as primarily serving their national community, rather than the worldwide, European, regional or local community. However, HEIs also see themselves as serving different communities. For example, they indicate that their bachelor's degrees focus more on regional and local communities, while masters' degrees, and even more so doctoral degrees, have a worldwide dimension (Figure 3).

Figure 3: Community primarily served

Q6. Which community do you see that your institution is primarily serving? Please choose one option per column. N=489.



3 For Trends 2024, it was decided to disregard the devolved nature of some systems (Germany, Spain and the United Kingdom), as this would have complicated the analysis with too-small samples.

4 Because of system differences, there is no consistent typology of European HEIs. In Trends 2024, the following categorisation has been used: comprehensive universities award degrees in all three cycles and are multidisciplinary (i.e. programmes in more than two subject areas/fields of science); specialised universities award degrees in all three cycles and are specialised in a particular subject area/field of science; technical universities award degrees in all three cycles and are specialised in technology, engineering and natural sciences; universities of applied sciences, or university colleges, offer more profession-oriented studies, usually at the first and second degree cycles only; music and art schools specialise in arts and/or music; open universities offer mainly distance learning, granting access to students without the formal entry requirements requested by conventional universities (i.e. upper secondary school certificate, academic degree).

Chapter 2

European, national and institutional strategies and reforms in times of change

Main points

- Europe matters: over 98% of HEIs find the Erasmus+ programme of the EU and the Bologna Process highly important. Other major EU initiatives, including the EEA, the ERA, Horizon Europe, the European university alliances, and the European Strategy for Universities, are important to 89% or more of HEIs. Interestingly, there is no major difference in the response patterns of institutions in EU member states, Erasmus+ programme countries, and elsewhere in the EHEA.
- Most institutions report major national higher education reforms in various areas that have taken place over the past five years. Two thirds of institutions across Europe confirm the high importance of national reforms in the areas of quality assurance (69%), digitalisation (68%), internationalisation (67%), institutional funding (64%), research policy (63%) and learning and teaching (63%). Reforms in some of these areas are reported to be highly important by a larger proportion of HEIs in the Eastern European countries, but also in Finland and the United Kingdom (UK).
- Only 5% of HEIs indicate that they are not at all involved in the development of national, system-level strategies and reforms. Most institutions confirm that they are at least consulted, either directly on an ad hoc basis (50%) or systematically (36%), and mainly through a representative body such as a national-level rectors' conference (59%). Forty-four per cent also point out that national reforms just set the direction and it is then up to the institutions to develop their own implementation approaches. Twenty-six per cent of the respondents report that HEIs themselves initiate some of the system-level strategies and reforms.
- Digitalisation, the Covid-19 pandemic, enhanced inter-institutional cooperation, greening and the SDGs, and economic developments are the top five issues that have impacted institutional strategies over the past five years. Other changes, such as political changes, geopolitical challenges, migration and demographic changes, have had some impact on some university strategies, with differences between countries.
- Underfunding represents a serious threat to HEIs, in a time when they have increased responsibilities to respond to multiple changes and challenges in their environment. Forty-four per cent of institutions report either continuously low or decreasing funding in the past five years. Seventy per cent of HEIs agree that underfunding is one of the top three obstacles for improving learning and teaching.
- Beyond the immediate disruption it caused in 2020, the Covid-19 pandemic is likely to have resulted in enduring changes for 40% to 66% of HEIs, depending on the aspects impacted. Online learning and the general organisation of work are among the issues, but for two thirds of institutions the most profound change brought by the pandemic is increased attention to students' wellbeing and mental health. Almost half of institutions make the same point for staff (47%).
- Digital preparedness has improved. However, while most institutions have policies in place for ethics, for integrity and data protection, and for enabling access for disabled students (all at over 90% of HEIs), digital resources and infrastructure appear to have received less attention. Institutional attention on artificial intelligence and blockchain is slightly less in evidence: full institution-wide approaches are not yet widespread.

- Seventy-two per cent of institutions have a strategy in place on greening and environmental sustainability; there has been progress since 2021, when the figure was 61%. The increase also suggests more holistic approaches within institutions, and towards society.
- On fundamental values as defined in the Bologna Process (academic freedom, academic integrity, institutional autonomy, student and staff participation, and the responsibility of and for higher education), the vast majority of respondents describe the situation as stable and quite good (53–63%), or even improving (21–32%). Nevertheless, it is concerning that almost a fifth of institutions (19%) report a decrease in institutional autonomy, and another 7% see it as continuously low. To a lesser extent, the same decreasing trend applies to academic freedom (11% of HEIs) and academic integrity (8%). While most institutions also assess the situation of student and staff participation positively, there might be scope for enhancement of participatory institutional cultures beyond granting formal rights.
- Support for academics and students at risk is increasing due to rising demand for support and refuge. Most institutions have a related policy in place for students (57%); of which 73% host students at risk or have done so in the past. Some 34% have a policy in place for researchers at risk; of which 64% host or have hosted such researchers in the past.
- Russia's war against Ukraine has enhanced the importance of support for those at risk, and in many countries and institutions has resulted in broad support. Almost two out of three institutions in the EHEA host Ukrainian students, 50% doing so under special conditions (reduced fees, support grants, etc.), and 41% host academic staff from Ukraine. Institutions also confirm the enhancement of existing collaboration with Ukrainian partners and the establishment of new partnerships. These partnerships are often in specific disciplinary areas and driven by individual faculties and academics.
- As a consequence of the war, most institutions have discontinued or reduced their collaboration with Russian and Belarusian institutions, resulting in diminishing numbers of incoming students and staff. However, exchanges among individual academics seem to have continued.

This chapter explores how universities relate to major European and national higher education policies and actions, as well as national reforms, in the past five years. During this period, major disruptions caused by political, societal and economic developments have also impacted higher education institutions. In this regard, this chapter examines the consequences of the Covid-19 crisis, the institutions' preparedness for digital transformation, and greening and sustainable development. It also provides an overview of how institutions respond to fundamental values and engage in active solidarity with academics and students at risk, notably in the context of Russia's war against Ukraine.

2.1. INSTITUTIONS' VIEWS ON EUROPEAN POLICIES AND ACTIONS

While the first period of the Juncker Commission was marked by little or no attention being paid to education and research, the 2017 Gothenburg Summit and the resulting European Universities Initiative initiated a new era, with a strong focus on higher education institutions as organisations, on their collaboration and on mobility.

How do HEIs perceive European policies related to their sector? Almost all of them (98%) find the EU flagship programme Erasmus+ to be of high (90%) or medium (8%) importance. While the financial aspect matters, in particular in countries with little or no national funding instruments for internationalisation, the value of the programme also lies in its ability to establish communities and networks, and it has become a part of the European identity, shared with global partners.

More surprising is that the Bologna Process and the EHEA score similarly highly (98%), though with a slightly smaller proportion of institutions attaching high importance to them (84%). Since its launch in 1999, the Bologna Process has been coordinating major reforms and adopted a number of widely used tools, such as the European Credit Transfer and Accumulation System (ECTS) and the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG). But its immediate impact on HEIs' everyday life and operations may not be self-evident, as transposition and implementation of agreed reforms lie with national authorities.

Generally, EU policies, programmes and initiatives targeting HEIs, such as Horizon Europe, the ERA, the EEA, the European university alliances, and the European Strategy for Universities, are all considered highly important by more than 50% of respondents, and this increases to more than 89% if aggregated with those finding them of medium importance.

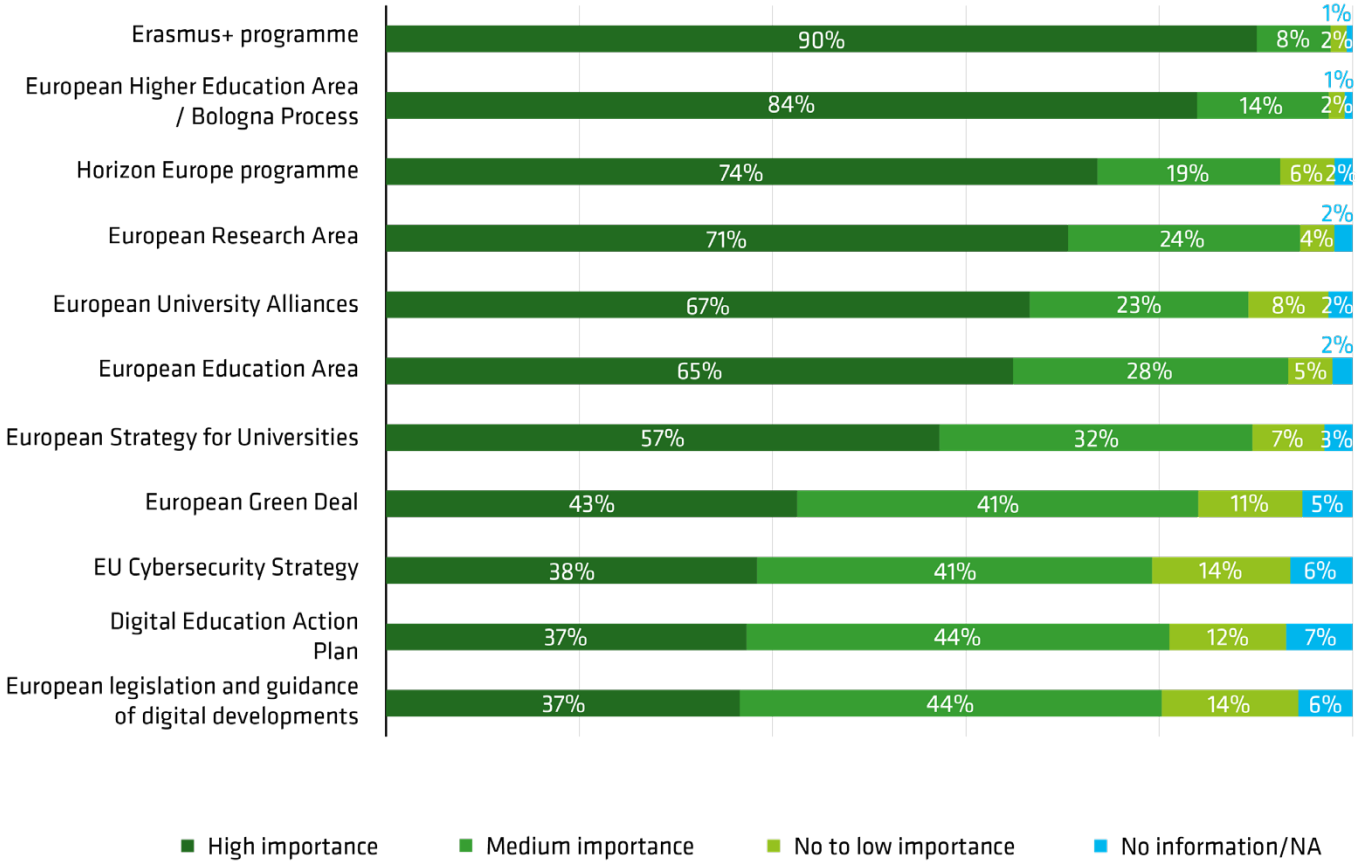
The "high importance" score that other more specific EU initiatives receive is slightly lower. This is the case for the Green Deal (43% of institutions), the Cybersecurity Strategy (38%), the Digital Education Action Plan (37%) and other legislation and guidance on digital developments (37%). Again, however, if aggregated with institutions finding them of medium importance, the proportion is over 70%.

This is a confirmation that not only are EU policies and programmes known by European HEIs, they are also of considerable importance to them. It also shows that these perceptions are shared across Europe, irrespective of the type and mission of the institution, its geographical location, and whether or not it is situated in the EU. For example, European policies are just as important for HEIs primarily serving a local, regional or national audience as they are for institutions targeting more European or global audiences.

For EU policy initiatives, no significant or systematic difference is found between institutions from EU member and non-member countries. This is particularly surprising for the European Strategy for Universities, whereas it is easy to explain for initiatives that invite global participation, such as the ERA and Erasmus+. Despite the fact that they currently cannot participate, 69% of Swiss institutions and 44% of UK institutions still find Erasmus+ to be of high importance to them, which supports the call for further exploring association with the programme in the interest of the entire European higher education sector.

Figure 4: Importance of European strategies, initiatives and funding programmes

Q10. What level of importance do the following European strategies, initiatives and funding programmes have for your institution? Please select one option per line. N=484.

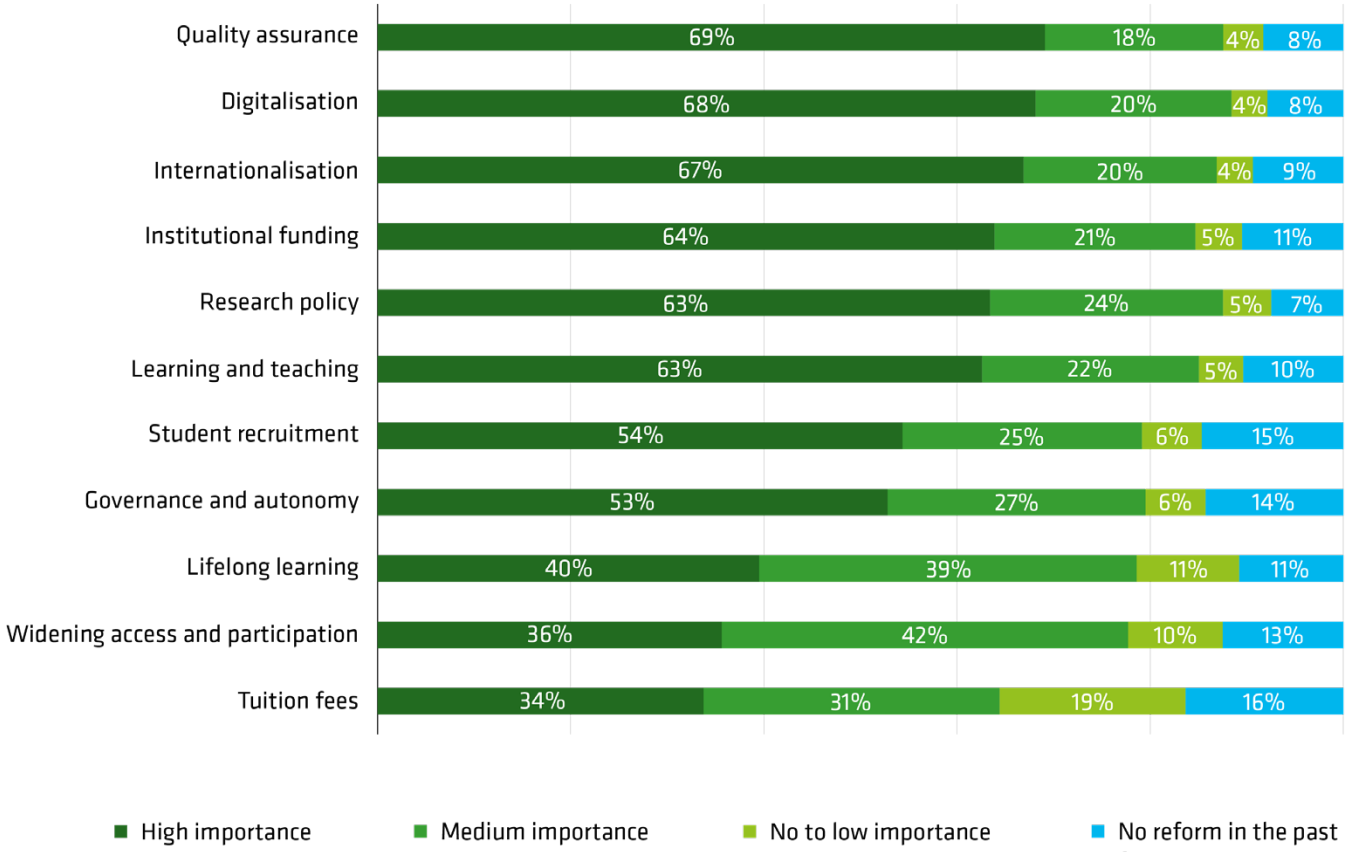


2.2. INSTITUTIONS' VIEWS ON NATIONAL REFORMS

All institutions have been subject to reforms in their national system during the past five years. The vast majority of HEIs also confirm that these reforms have been of high or at least medium importance for them, most significantly in quality assurance (of high importance for 69% of HEIs, of medium importance for another 18%), digitalisation (68%, 20%) and internationalisation (67%, 20%). Almost half of all respondents (46%) find all these three areas of reforms highly important. Reforms on institutional funding (64%, 21%), research policy (63%, 24%) and learning and teaching (63%, 22%) also receive high scores. Some of these resonate with European and global changes that also impact institutional strategies, such as digitalisation and internationalisation. Some other reforms are on perennial topics (quality assurance, funding, research policy, and learning and teaching) that also relate to transitional changes in recent years. For example, the impact that digitalisation has on education provision and the student experience is likely to have required reforms in learning and teaching, but also in quality assurance.

Figure 5: Important national reforms, past five years

Q11. In the past five years, how important have national reforms in the following areas been for your institution? Please choose one option per line. N=483.



While more than half of respondents also highlight important national reforms concerning student recruitment, and governance and autonomy, other reforms – for example on lifelong learning, and widening access and participation – are of high importance for 40% or fewer of the institutions.

In a few countries, the high impact of national reforms is confirmed by 75% or more of their institutions.

Table 1: Country-specific trends for highly important national reforms

Q11. In the past five years, how important have national reforms in the following areas been for your institution? Please choose one option per line. N=483.

Reform topic	Countries
Quality assurance	Albania, Bulgaria, Georgia, Latvia, Moldova, Türkiye, Ukraine
Digitalisation	Albania, Bulgaria, Croatia, Hungary, Kosovo, Latvia, Moldova, Romania, Slovenia, Ukraine
Internationalisation	Albania, Azerbaijan, Bosnia and Herzegovina, Croatia, Georgia, Hungary, Kosovo*, Latvia, Moldova, Türkiye, Ukraine, United Kingdom
Institutional funding	Albania, Belgium (FR), Finland, Latvia, Moldova, Romania, Slovenia, United Kingdom
Research policy	Bulgaria, Finland, France, Ireland, Latvia, Moldova, Slovenia
Learning and teaching	Albania, Azerbaijan, Belgium (FR), Bosnia and Herzegovina, Finland, Kazakhstan, Latvia, Lithuania, Moldova, Poland, Ukraine, United Kingdom
Student recruitment	Albania, Finland, Kosovo, Lithuania, Moldova, Ukraine, United Kingdom
Governance and autonomy	Bosnia and Herzegovina, Croatia, Kazakhstan, Latvia, Moldova
Lifelong learning	Albania, Bosnia and Herzegovina, Croatia, Finland, Kazakhstan, Moldova, Norway
Widening access and participation	Bosnia and Herzegovina, Georgia, Moldova
Tuition fees	Moldova, United Kingdom

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

Data correlations suggest that some of these reforms may already have had an impact. To take one example, institutions that have experienced national reforms on widening access in the past five years are more likely to have dedicated strategies for different types of underrepresented or disadvantaged learners in place across the entire institution. For instance:

- 36% of the total sample have a strategy for supporting students from ethnic minority groups, while 52% of institutions that report a national reform on widening access have such a strategy;

- fewer than 36% of the total sample have an institutional strategy on female and male students, compared with 47% of HEIs with a strategy for attracting female students and 56% with a strategy for attracting male students, where such national reform has taken place.

The Trends 2024 survey did not collect details on the reforms themselves. But it did ask how reforms have been developed and implemented, and what role HEIs have played in this regard:

- HEIs are usually involved in one way or another in the development of system-level strategies and reforms; only 5% of responding institutions indicate that they are not involved at all.

- There are different ways of involving HEIs in reform development:
  - the most common approach is through a representative body such as a national-level rectors' conference (59% of respondents), which is the dominant model in Czechia, Hungary, Ireland, Lithuania and Switzerland;
  - 50% of institutions also report participating in ad hoc consultations, which is dominant in Belgium (FR), Georgia, Ireland, Latvia, Poland and the UK;
  - slightly less common (36%) are systematic consultations, which appear to be widespread in Finland, Moldova, Sweden and Switzerland.
  - The arrangement whereby national reforms set out the direction and it is left to institutions to develop the implementation approaches reflects the experience of 44% of HEIs. In some countries (Finland, Georgia, Hungary, Norway, Switzerland and Ukraine), a bigger share of institutions believe that they do have such autonomy. In some others (Bosnia and Herzegovina, Kazakhstan, Latvia, the Netherlands and Spain), the proportion of institutions believing that they have such autonomy is lower than average. Interestingly, there is not a single country where all HEIs either agree or disagree that it is happening in this way.
  - About a quarter of respondents (26%) report that HEIs themselves initiate some of the system-level strategies and reforms. This is the case for over half of institutions in Belgium (FR), Moldova and Sweden.

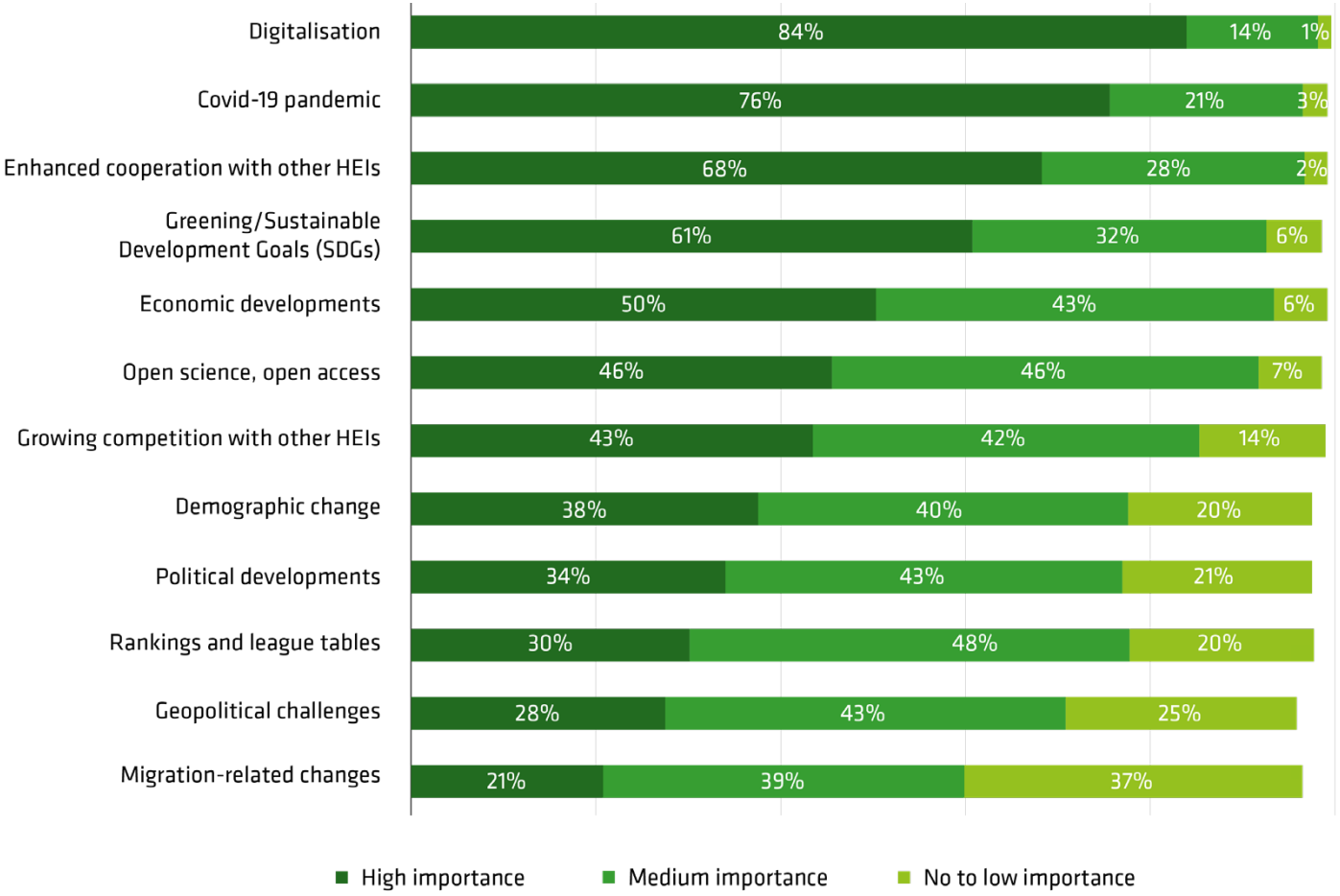
Finally, data correlations suggest that the higher education sector generally is more likely to initiate national reforms or strategies in systems where public authorities give a more proactive role to the sector, by allowing institutions to develop their own strategy, or at least consulting them on national reforms, either directly or through a representative body.

2.3. INSTITUTIONAL RESPONSES TO CHANGE

For at least half of the institutions, the top five developments of high importance for their institutional strategies are digitalisation, the Covid-19 pandemic, enhanced inter-institutional cooperation, greening and the SDGs, and economic developments. Aggregated responses indicating impacts of high and medium importance point to these five areas as dominant in at least 93% of HEIs, followed closely by open science and open access (92%), and growing competition with other HEIs (85%).

Figure 6: Developments impacting institutions' overall strategy, past five years

Q9. Which of the following developments have impacted your institution's overall strategy in the past five years? Please select one option per line. N=485.



Most HEIs see their strategies as being somehow impacted by demographic changes, political and geopolitical developments, and migration, although over a fifth of HEIs find these to be not important. This is uneven across the EHEA, with considerable numbers of institutions in certain countries confirming high impact.

Table 2: Country-specific trends, highly important developments impacting institutions' overall strategy, past five years

Developments	Countries
Demographic changes	Bosnia and Herzegovina, Croatia, Germany, Latvia, Lithuania, Moldova, Poland
Political developments	Bosnia and Herzegovina, Finland, Latvia, Lithuania, Moldova, the Netherlands, Norway, Switzerland, Ukraine, United Kingdom
Geopolitical challenges	Latvia, Moldova, Ukraine
Migration-related challenges	Bosnia and Herzegovina, Kazakhstan, Kosovo, Moldova, Poland, Ukraine
Economic developments	Bosnia and Herzegovina, Finland, Latvia, Moldova, Türkiye

The importance granted to these developments may also vary depending on the type of institution. For instance, demographic changes are of high importance for 38% of all institutions but for 58% of the universities of applied sciences; meanwhile they are not very important to a larger share of music and art schools, probably because they have smaller and selected student cohorts.

Many of these challenges cited by HEIs are analysed in EUA's vision for 2030, *Universities without walls* (EUA, 2021), based on a broad sector consultation conducted in 2020. Issues identified there as impacting on higher education include climate change and sustainability, technological developments and their impact on citizens and labour markets, persisting social disparities, demographic changes, political developments, geopolitics, democratic systems being put under pressure, and misinformation jeopardising the public debate. In the middle of all this, the Covid-19 pandemic can be seen as a challenge, but also as an accelerator for change. *Universities without walls* concluded that these are areas where HEIs have played, and are often expected to play, a prominent role through their diverse missions.

However, universities are expected to do more regarding the grand challenges of our times, but with fewer or the same resources: underfunding in many higher education systems continues to be a challenge. In the Trends 2024 survey, a third of institutions (34%) indicate that their financial means had decreased during the past five years, with another 10% reporting them stable but not very good. In contrast, 29% of institutions think that their financial means have increased, and another 27% that they have remained stable and are quite good. This overall picture reveals differences between countries.

Table 3: Development trends of institutions' financial means in the last five years

Q14. (partial). Which of the following trends have you observed in the past five years? Please select one option per line. N=483.

Budget increase (at 50% of HEIs or more)	Budget decrease (at 50% of HEIs or more)
Albania	Belgium (FR)
Azerbaijan	Finland
Bosnia and Herzegovina	Ireland
Hungary	Norway
Kosovo	Poland
Romania	Portugal
Slovenia	Ukraine

Underfunding is confirmed by a much larger proportion of HEIs in a specific area of activity: 70% of HEIs see the lack of funding as one of the top three obstacles for improving learning and teaching, including 44% that have it as the top obstacle (see also Chapter 4).

2.4. CONSEQUENCES OF THE COVID-19 PANDEMIC

The Covid-19 pandemic not only required the pivoting of learning and teaching, research and international collaboration to online working modes, but similarly impacted administration, services and all major resources. As for the rest of society, the pandemic was a major disruptor for HEIs and their members, and had immediate but also long-term impact.

Table 4: Post-Covid-19 increases

Q31. In 2023, do you see any increase in the following areas, compared to the situation before the Covid-19 pandemic? Please choose all applicable options. N=480.

Attention to students' mental health and wellbeing	66%
Blended learning	64%
Teleworking for administrative staff	58%
Students' demand for more blended learning	57%
Flexible learning offer	52%
Online testing and examinations	50%
Institutional preparedness for emergencies and crisis management	48%
Attention to staff's mental health and wellbeing	47%
Teleworking for academic staff	47%
Hybrid learning	45%
Online learning offer	45%
Virtual exchange / virtual mobility	41%
Collaborative learning provision with other institutions	36%
Academic staff's demand for more blended learning	35%
Lack of academic preparedness of secondary school students entering your institution	29%

For two thirds of institutions, the most profound change brought about by the pandemic has been the increased attention to students' wellbeing and mental health; almost half of institutions (47%) make the same point for their staff. The 2024 Eurostudent report suggests that half of all students experience mental health issues: based on 2022 data, these might still relate partly to the experience of the Covid-19 pandemic and associated measures (Eurostudent, forthcoming). But there seems to be broad agreement in the higher education sector that this issue requires further institutional and possibly also system-level attention, beyond the pandemic. Therefore, there has been strong interest in the issue among institutions in recent years. An EUA 2022 Thematic Peer Learning Group Report on staff and student wellbeing recommended that institutions address wellbeing in a systematic fashion, on a broad range of issues, from support services to communications and infrastructure (Prescott *et al.*, 2023).

As in many other industries (see, for example, EU-OSHA, 2023, pp. 5–10), another clear challenge triggered by the pandemic is the reorganisation of staff work: 58% of institutions report an increase in teleworking for administrative staff and 47% for academic staff. Also probably influenced by the experience of the Covid-19 crisis, about half (48%) of HEIs have enhanced their emergency and crisis management procedures.

While many students have been eager to return to campus, which for most first- and second-year students was probably a completely new experience, 57% of institutions confirm that students continue to demand blended learning. About half of the institutions report an increase in flexible (52%) and hybrid learning modes (47%), and, to a slightly lesser extent, their online learning offer (45%) and virtual exchanges (41%). Study modes and flexible learning are further addressed in Chapter 4 of this report.

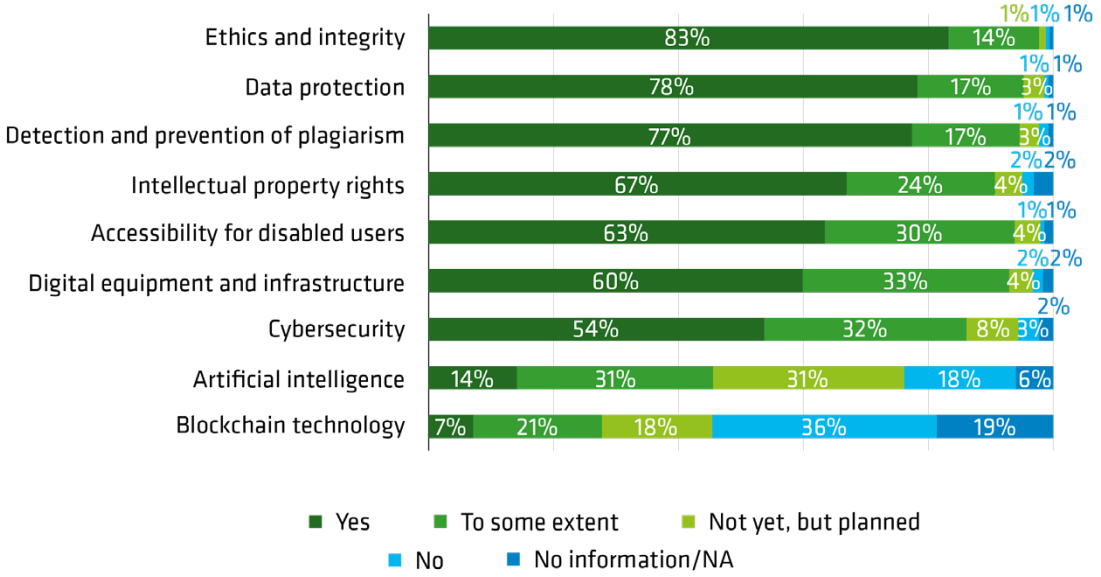
2.5. PREPAREDNESS FOR DIGITAL TRANSFORMATION

The fact that digitalisation is so high on HEIs' agendas is hardly a surprise. It has been an ongoing development, and touches on all missions and on the organisation and management of HEIs. On the eve of the Covid-19 pandemic, most HEIs had acquired a considerable level of digital resources, infrastructure and experience, though these had not been fully mainstreamed. A survey conducted in the first months of 2020 noted that "practically all institutions managed to pivot to blended and online learning, which may not have been the case in 2014. But resources, while available, were in many regards insufficient for the sudden enhanced use. A good example are online library services: while 90% had such services in place before, 65% want to enhance them as an immediate reaction to the crisis" (Gaebel *et al.*, 2021). Similarly, around 70–80% of institutions had some policies and approaches to respond to adverse impacts of increased digitalisation, such as data protection, plagiarism and cybersecurity. However, half of them also stated a need for improvement. In the first half of 2020, three quarters of the responding institutions confirmed concrete plans to boost their digital capacity beyond the crisis (*Ibidem*).

What does this look like three years later? Almost all institutions have implemented policies, either fully or to some extent, in ethics and integrity (97%), data protection (95%), detection and prevention of plagiarism (94%), and intellectual property rights (91%). This seems to have been a priority for the institutions, due to technical, legal and reputational risks and pressures, and probably also to increased system-level policy attention. As stated by the Ministers of Education in the Rome Communiqué of the Bologna Process, "a robust culture of academic and scientific integrity that blocks all forms of academic fraud and distortion of scientific truth, will be supported by all higher education institutions and all public authorities" (EHEA, 2020a).

Figure 7: Internal policies implemented

Q13. Has your institution implemented internal policies on the following issues? Please select one option per line. N=482.



By contrast, policies on digital equipment and infrastructures, although a high priority for institutions, have been implemented less systematically: 60% of HEIs have completed full implementation and another 33% have done so to some extent. This may have to do with the complexity of the issues, but also with the fact that at many institutions, digitalisation peaked during Covid-19 crisis but may have decreased as an institutional priority immediately afterwards. Several factors may have played a role, such as decreased interest or even aversion among staff and students, external and internal pressures to move back to campus and to conventional modes of delivery, and – importantly – difficulties in agreeing on holistic policies for the adaptation of learning and teaching approaches to be rolled out throughout the institution. Finally, the lack of funding matters in the implementation of such equipment and infrastructures, given the considerable costs of purchasing and maintaining hardware and software, and the necessary staff training. The fact that blended and hybrid approaches also require transformation of physical infrastructure is an additional hurdle from a financial and learning design perspective.

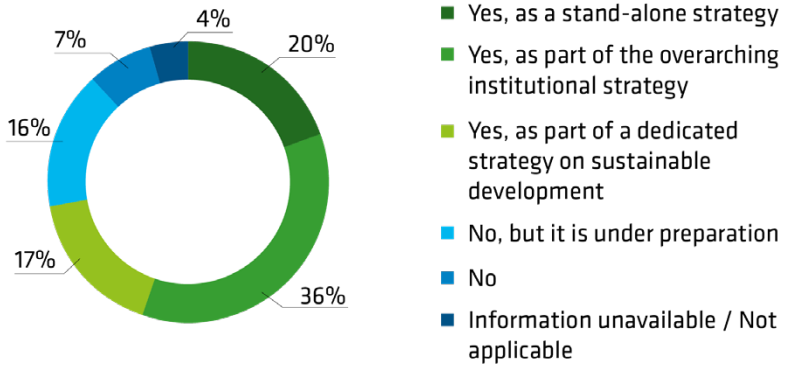
Moderate progress has been made with regard to emerging technologies. While it is likely that all institutions explore them academically, in 2020 relatively few made active use of artificial intelligence (28%) and blockchain technology (17%), though 53% and 45% of HEIs, respectively, confirmed plans to do so in the future (Gaebel *et al.*, 2021, p. 36). In the Trends 2024 survey, only 14% of HEIs indicate that they are fully equipped and 31% that they are equipped to some extent with policies on the use of artificial intelligence. Only 7% of HEIs indicate that they have blockchain technology fully covered by their policy, with another 21% having it covered to some extent. Apparently, HEIs, like other organisations, are still exploring how to make best use of these tools, in view of enhanced technologies and emerging legislation. For the latter, as mentioned under section 2.1, about three quarters of HEIs confirm the importance of EU legislation and guidance on digital developments, such as the Digital Education Action Plan and the EU Cybersecurity Strategy.

2.6. GREENING AND SUSTAINABLE DEVELOPMENT

Greening and sustainable development are of high strategic importance for 74% of responding institutions, with regard to their research and education provision and their role in society, but also as organisations, with measures aimed at both greening the campus and saving energy. In the same vein, 52% of HEIs have fully implemented and 39% of HEIs partly implemented policies on greening and sustainability. The figure of 72% of institutions having a strategy in place on greening and environmental sustainability is an increase on 2021, when a survey found that this was the case at 61% of HEIs. This confirms the growing trend already identified in 2021, when 26% of HEIs planned to develop such a strategy (Stöber *et al.*, 2021).

Figure 8: Green transition or environmental sustainability strategies

Q41. Does your institution have a strategy or a similar document that explicitly refers to the green transition, or environmental sustainability? Please select one option. N=482.



2.7. FUNDAMENTAL VALUES

Key policy documents of the EHEA, the EEA and the ERA have consistently referenced the high importance of values in higher education and research. While earlier documents seemed to take these values for granted, over the past decade considerably more attention has been given to how to protect and enhance them. In addition to reaching commonly agreed definitions, different initiatives aimed at monitoring and evaluating how these values are considered in different higher education systems have been emerging.

In the Bologna Process, a working group[5] has been developing statements describing "fundamental values", i.e. academic freedom, academic integrity, institutional autonomy, student and staff participation, and the responsibility of and for higher education.[6] Apart from enhancing awareness of these values and reaching a more shared understanding, the intention is to regularly monitor them, *de jure* and *de facto*. This is not an easy undertaking from a methodological point of view, as it cannot rely solely on information provided by public authorities. Data and information from existing instruments – such

5 https://www.ehea.info/page-Working-Group-FV

6 This refers to the responsibility of higher education towards society, and the public responsibility for higher education.

as the Academic Freedom Index[7] and EUA's Autonomy Scorecard, established in 2009 with regular updates since then (Bennetot-Pruvot *et al.*, 2023) – could be used to better define and differentiate the matter, and enable a comparison among the European higher education systems; however, this would not cover all the values, and might examine them from slightly different angles. The 2024 Bologna Process Implementation Report provides for the first time a chapter on values, with data from *de jure* monitoring (EC/EACEA/Eurydice, 2024, pp. 93–118), while the Tirana Ministerial Communiqué (EHEA, 2024) welcomes and confirms a dedicated monitoring initiative for *de jure* and *de facto* monitoring of fundamental values, an endeavour that is expected to provide data for the EHEA by 2027.

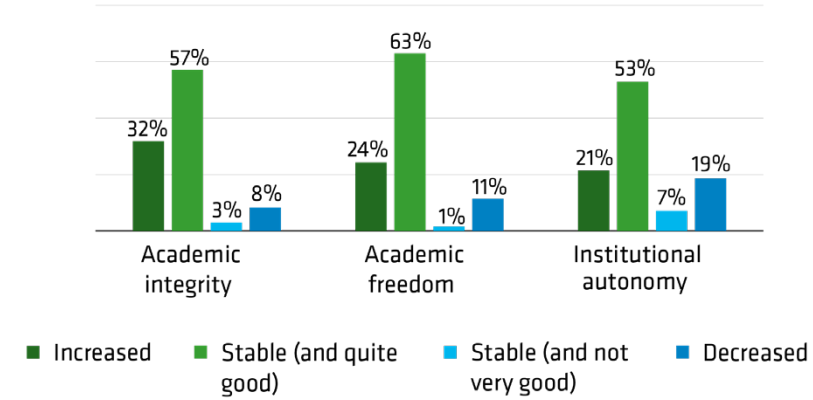
In Trends 2024, between 74% and 89% of responding HEIs state that fundamental values have been in a good stable or improved situation over the past five years. More than half of institutions state that academic integrity, academic freedom and institutional autonomy are stable and quite good, and another 21–32% of institutions that these have been increasing in their context.

Considering the crucial importance of these values, it is nevertheless concerning that a fifth of institutions (19%) report a decrease of institutional autonomy, and another 7% consider autonomy to be consistently low. Meanwhile, 11% of HEIs also report a decrease in academic freedom, and 8% report the same regarding academic integrity.

There is a slight correlation between national governance and autonomy reforms and how HEIs assess the state of values: compared with 10% of institutions in countries with no significant reform, 27% of institutions in countries with reforms report an increase in academic freedom. However, another 20% of institutions that have experienced a governance and autonomy reform report a decrease; the data cannot lead to conclusions on whether this is despite or because of the reforms.

Figure 9: Fundamental values in the past five years

Q14. (partial). Which of the following trends have you been observing in the past five years? Please select one option per line. N=483.



Once again, behind this overall picture, there are clear differences between countries:

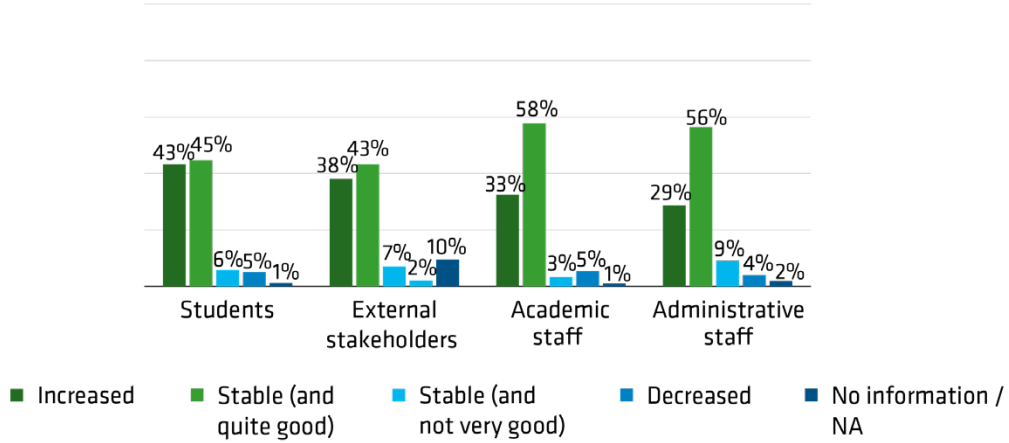
- An above-average proportion of institutions in Albania, Azerbaijan, Bosnia and Herzegovina, Georgia, Kosovo, Kazakhstan, Moldova, Romania and Ukraine report an increase in academic freedom over the past five years. The same countries, plus Latvia, also report an increase in academic integrity.
- A third of institutions in Hungary and the UK and about 40% of institutions in the Netherlands and Poland indicate a decrease in academic freedom during the same period.
- A quarter of Hungarian institutions also indicate a decrease in academic integrity.
- Institutional autonomy has increased more than average in Albania, Bosnia and Herzegovina, Georgia, Kosovo, Hungary, Moldova and Slovenia over the past five years. Meanwhile, two thirds of institutions in Ireland find that institutional autonomy has decreased in the past five years. This is also the case for 56% of institutions in the UK, 43% of HEIs in Latvia and Sweden, and 40% of HEIs in Belgium (FR).

7 https://academic-freedom-index.net/

In addition, institutions observe a generally positive picture over the past five years for the participation of students and staff in higher education governance, one of the hallmarks of the Bologna Process. Most institutions report either increased participation or stability in a good situation for students, academic and administrative staff, and external stakeholders. For the majority of HEIs, the participation of academic and administrative staff in the institution's governance is deemed stable and quite good, with approximately another third of HEIs finding that it has progressed over the past five years. This contrasts with the picture for the participation of students and external stakeholders: only just over 40% of HEIs find it stable and quite good. However, there is a noticeable improvement trend for about another 40% of HEIs, who report increased participation for these two groups. The two groups that face the most difficulties in participating in governance are administrative staff (with 9% of HEIs noting that their situation is stable but not good) and external stakeholders (7%).

Figure 10: Participation in institutions' governance, past five years

Q15. How would you describe the participation of the following groups in your institution's governance, over the past five years? Please select one option per line. N=481.



A follow-up question provides more detail on how students participate in day-to-day governance:

- Students are represented in the institution's governance bodies at 97% of HEIs.
- They enjoy voting rights in these bodies at 96% of HEIs, although only to some extent at 16% of them.
- They are represented in institutional committees and working groups in 98% of HEIs.
- At 97% of institutions, they have an elected and representative student organisation.

However, only 76% of HEIs involve students fully and 18% involve them partially in quality assurance. This is surprising, as the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) stipulate that as part of internal quality assurance, study programmes should be "reviewed and revised regularly involving students and other stakeholders" (ESG, 2015, 1.9).

Overall, the findings suggest that there is considerable awareness of participatory approaches in institutional governance, but also clear scope for improvement. Monitoring and surveys are unlikely to improve the situation in countries that disregard human and civil rights. But if paired with other supporting measures, they can underpin continued policy and institutional attention to the issue and have an impact on higher education and research, and on society at large.[8]

2.8. INTERNATIONAL SOLIDARITY: SUPPORTING ACADEMICS AND STUDENTS AT RISK

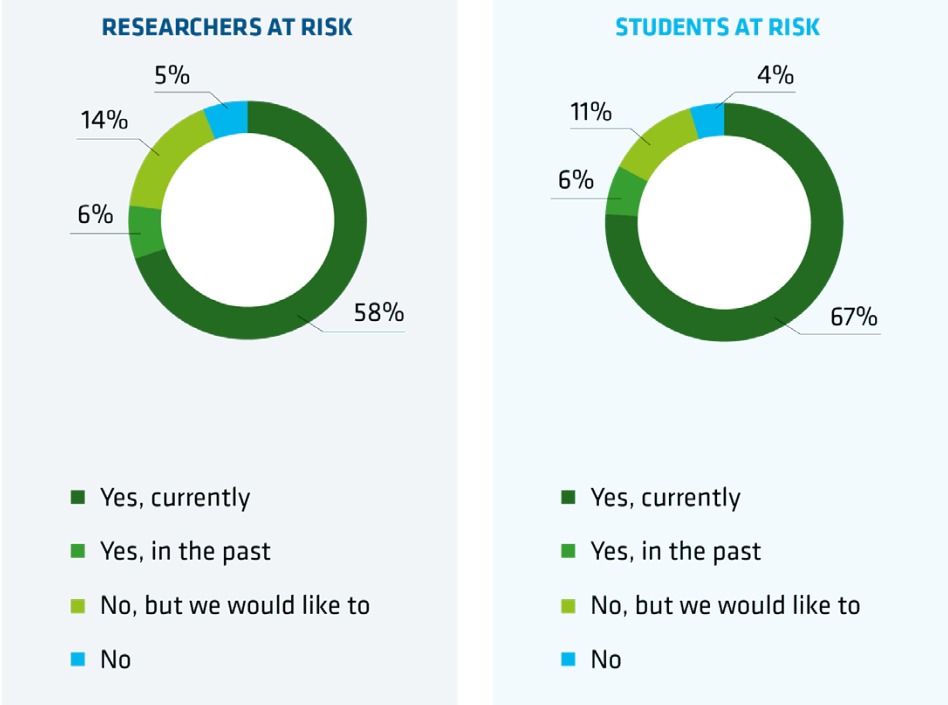
Over recent years, engagement and support for academics and students at risk has gained in importance at HEIs because of increased demand and probably also the emergence of more – and more visible – institutional, national and

8 EUA has consistently highlighted the need to reach out to institutions and other relevant structures and organisations, to enhance awareness and exchange good practice, and to support in systems and institutional levels a culture embracing and cherishing values. See EUA's statement issued before the 2024 EHEA Ministerial Conference in Tirana: https://bit.ly/EHEApre-confstatement

European policy and support initiatives. For institutions, such engagement is usually part of responsible internationalisation, equity and inclusion agendas, and is driven by their values. Growing awareness of geopolitical and migration-related challenges is another aspect, although adverse national policies and overly negative perceptions of migration in general, and refugees in particular, often prevent or hamper institutional engagement. Still, for more than half of institutions, engagement of students and academics with a migrant, at-risk or refugee(-like) background is a major topic. Most institutions have a related policy in place for students (57%), and 73% also host students at risk or have done in the past. Moreover, 34% have a policy in place for researchers at risk, and 64% host or have hosted such researchers in the past.

Figure 11: Hosting at-risk backgrounds

Q38.2. Does your institution host researchers or students at risk? Please select one option per column (one for researchers, one for students). N=281.



An additional factor in the increased importance of, and engagement on, this matter is the Russian invasion of Ukraine on 24 February 2022, which prompted European solidarity towards Ukraine. It triggered increased discussion of geopolitics, security, energy and technological sovereignty, and, importantly, European values. In the higher education sector, measures to support students and staff from Ukraine were swiftly put in place, along with approaches to enhance collaboration with Ukrainian partner institutions in the longer run (EUA, 2022a). Eighty per cent of institutions answer that they have solidarity measures in place for supporting Ukrainian students, staff or institutions. Two thirds of institutions host Ukrainian students, about half of respondents doing so under special conditions (reduced fees, support grants, etc.), and 41% host academic staff from Ukraine.

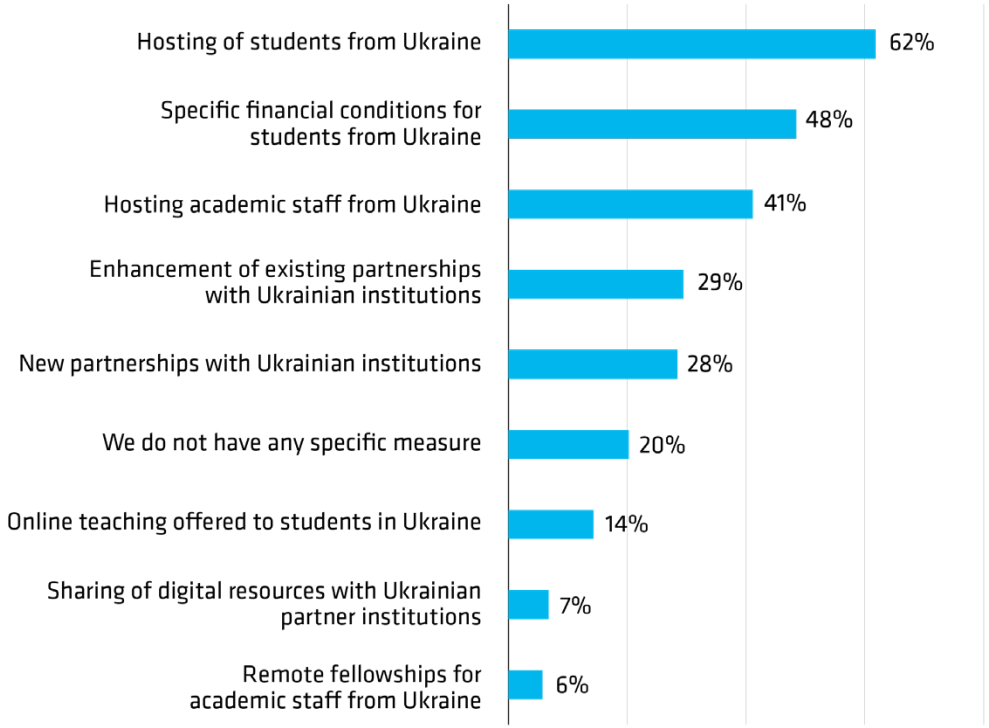
In addition, 29% of institutions report having enhanced their existing partnerships with Ukrainian institutions, while another 28% have established new ones. This is a very positive development, as EUA's recommendations on supporting the Ukrainian university sector (EUA, 2023b) identify inter-institutional collaboration as a key success factor for continued support for Ukrainian higher education. According to a 2023 report by the Ukrainian Erasmus+ Office,[9] the vast majority of the 281 Ukrainian universities and 234 other HEIs (colleges, academies) continue to function, some of them in online or blended mode, with around 40 institutions displaced. In contrast, the figure of only 14% of institutions offering online teaching to Ukrainian students appears relatively low. Institutions in some neighbouring countries are specifically active in this area, in particular Lithuania and Poland.

Some other measures are undertaken by fewer than 10% of institutions, namely remote fellowships for academic staff (6%) and sharing digital resources (digital labs, repositories) (7%).

9 https://erasmusplus.org.ua/wp-content/uploads/2022/11/d4.1.d4.1.2.-recent-developments-in-ukraine_education_dec2023_neo_system.pdf

Figure 12: Supporting Ukrainian higher education

Q49. Does your institution engage in specific measures in view of the war in Ukraine? Please select all applicable options. N=478.



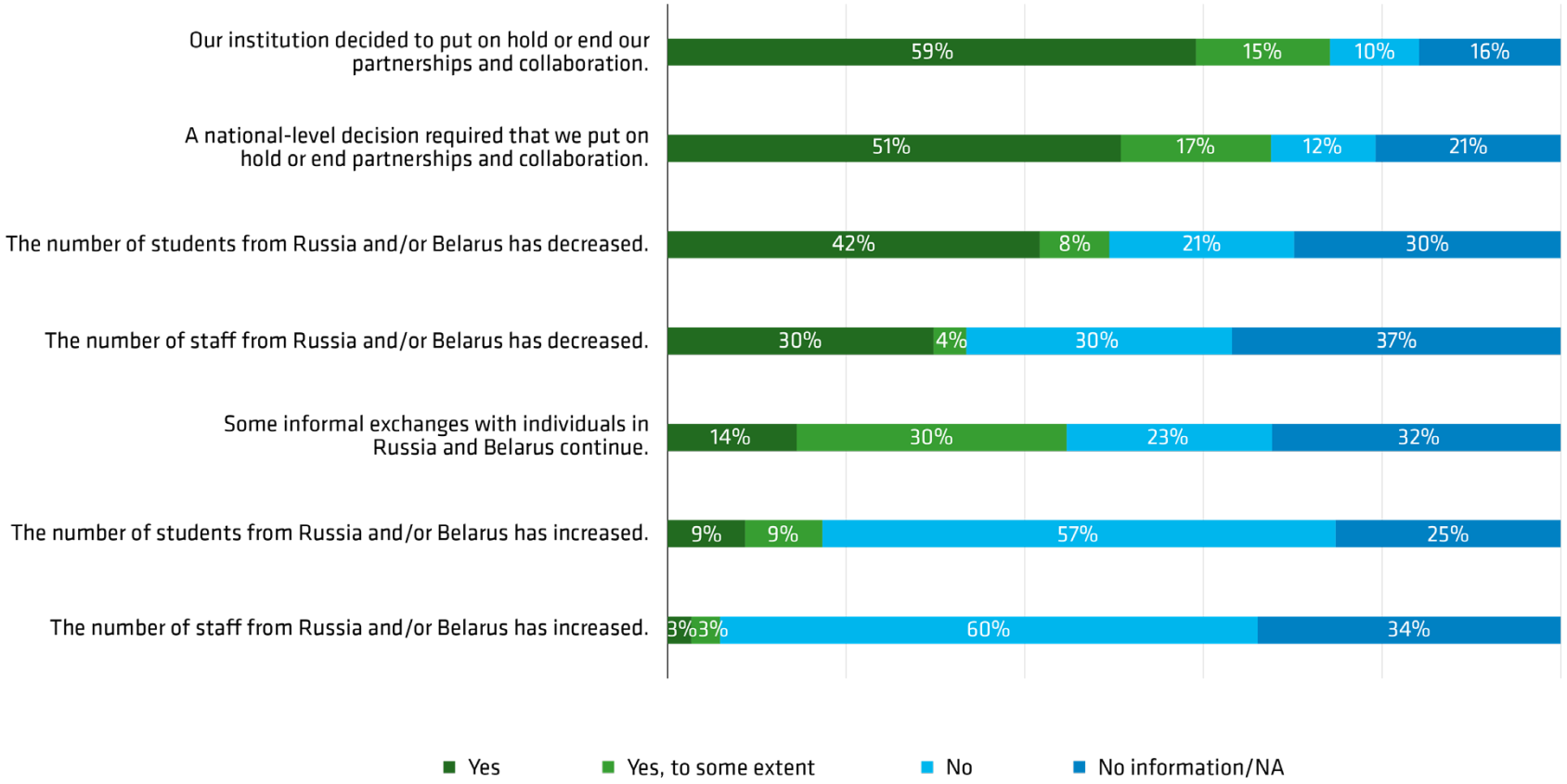
An EUA continuous mapping initiative[10] started in autumn 2023 identified more than 300 initiatives in the EHEA. While many of them are about hosting students and staff, a considerable number address virtual or hybrid exchange and collaboration, in slight contradiction of the relatively low figure referenced above. Noticeably, many initiatives in the mapping relate to specific disciplines (such as support for medical education) and collaboration between individual faculties and academics on either side, rather than being the result of large-scale inter-institutional approaches.

The war in Ukraine has also impacted cooperation with institutions in Russia and Belarus. In 2022, the Bologna Process suspended the rights of representation of both countries, and in the EU, all programmes involving the two governments were put on hold, still leaving the Erasmus+ programme open for individual mobility of staff and students. Three quarters of institutions responding to the Trends 2024 survey report that they have decided to put on hold or end their relations with institutions in Russia and Belarus entirely (59%) or to some extent (15%). A slightly lower number (68%) refer to a national-level decision in this regard. Subsequently, 50% of institutions report decreasing student numbers from Russia and Belarus, and 34% decreasing staff numbers, while at the same time 18% of HEIs report increasing student numbers and 6% increasing staff numbers from these two countries. At 44% of institutions, exchanges with individual academics may still continue. Notably, on all these aspects, a substantial proportion of respondents (16% to 37%) indicate that they have no information.

10 https://eua.eu/118-uncategorised/852-call-for-contributions-supporting-higher-education-in-ukraine-he4ua-initiative.html

Figure 13: Impact of war in Ukraine on universities' relationship with Russia and/or Belarus

Q50. How did the war in Ukraine impact your relationship with Russia and/or Belarus? Please choose one option per line. N=472.



Chapter 3

Higher education missions

Main points

- Most institutions surveyed under Trends 2024 perceive the research and education missions as equally important, and indicate concrete measures to interrelate the two. The connection is also demonstrated by the fact that almost all institutions include research experience for students in the education offer, though more commonly at master's (59% in all or most programmes) than at bachelor's (45%) level.

- In addition to education and research, institutions engage in a number of other missions or mission areas, in particular the third mission – or service to society – and internationalisation. Institutions also identify important areas such as innovation, industry collaboration, sustainable development and equity, diversity and inclusion (EDI). While all or most institutions embrace multiple missions, this raises questions on strategy, priority-setting and resources.

- More than two thirds of institutions describe service to society as a strategic priority that is on the rise, and many of them expect their activities in this area to increase further in the future. Challenges are also mentioned, in particular underfunding and understaffing, and, to a lesser extent, difficulties in mapping their third mission activities, lack of external recognition, and increasing performance pressure from external authorities and partners.

- The majority of institutions provide support for teaching in the form of training as well as through exchanges and collaboration opportunities for teachers. On average, about two thirds of institutions have learning and teaching centres in place. Such centres typically offer professional development activities and advice, and help facilitate communities of teaching practice across the institution. Although in some countries this is standard at all or most institutions, in others it is not the case. However, the development trend is towards more institutions installing learning and teaching centres.

- Most institutions take into account teaching performance evaluations for career progression. Awareness of parity of esteem for teaching and research activities in academics' careers has increased, but many institutions still confirm that teaching plays a minor role compared with research in academic assessment and career progression. While student feedback surveys are the most common method used by almost all institutions for assessing teaching performance, most institutions confirm the need to improve and diversify teaching assessment approaches. In this regard, a positive sign is the use of teaching portfolios, which are in place in almost half of institutions.

- In line with the increased attention given to the issue at European policy level, almost all HEIs have adopted EDI as a major priority and have developed strategies and policies to address it. Concrete measures to support EDI through student and staff policies have increased over the past five years. However, institutions report difficulties in sufficiently and adequately funding their activities. There are also differences between countries in terms of what EDI policies for students, for instance, entail, pointing to diverse approaches to EDI in different systems, which are difficult to assess and compare. Moreover, given the discrepancies between national policies and national investments in EDI, some institutions are concerned that this might result in rather superficial measures instead of a holistic approach that would embrace EDI as a precondition for quality and excellence, and ultimately strengthen the European higher education sector.

This chapter offers an overview of how HEIs see their multiple missions, with a focus on education and how it is supported and recognised, including in its intersection with research, the third mission (service to society) and equity, diversity and inclusion (EDI).

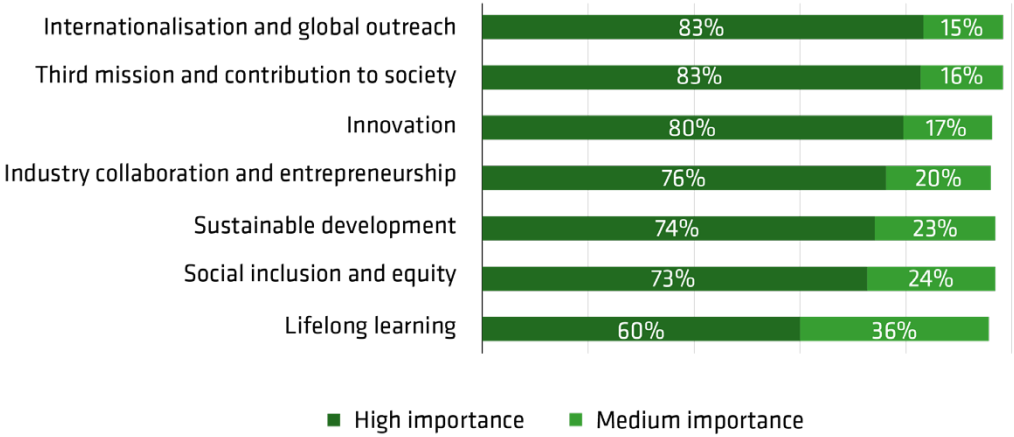
3.1. MULTIPLE INSTITUTIONAL MISSIONS: OPPORTUNITIES AND CHALLENGES

While no one would contest that universities, and higher education institutions in general, are places for research and education, there is also growing consensus that they are not limited to these, and that their role and task is much boarder. In addition to education and research, for instance, EUA's 2030 Vision *Universities without walls* lists innovation and culture, and emphasises the SDGs and the institutions' contribution to society (EUA, 2021). As already mentioned in Chapter 2.3, institutional strategies respond to a wide range of areas that, depending on individual institutions, might develop into a mission, or at least a mission area. In particular, service to society (the third mission) is receiving increased and increasing attention at institutions as well as at national and European policy levels, where it has been featured much more prominently in EU and EHEA policy documents than it was a decade ago.

In addition to research, education and service to society, HEIs grant considerable importance to mission areas such as internationalisation and global outreach (high importance for 83% of them), innovation (80%), industry collaboration and entrepreneurship (76%), sustainable development (74%), and social inclusion and equity (73%).

Figure 14: Areas of importance to the institution

Q8. How important are the following areas for your institution? Please select one option per line. N= 482.



The actual priority-setting may vary depending on the institutional profile. As expected, all (100%) technical universities prioritise industry collaboration and entrepreneurship and are more likely to give importance to innovation (94%). A large proportion of technical universities also find internationalisation to be important (92%, compared with 83% of the total sample). Music and art schools seem to stand out, as they tend to find all these areas to be of significantly less importance than do other types of institutions. For example, only 17% of music and art schools find lifelong learning important (compared with 60% of all respondents), and they score approximately 30 percentage points lower than the average response rates as regards the importance of innovation, industry collaboration and entrepreneurship, sustainable development and social inclusion.

This overall picture confirms a multitude of priorities for HEIs, on top of – and interconnecting with – their traditional missions. This positively signals responsiveness to society, but should also call attention to the potential risks of overload of policies, activities and workload. In addition, institutions share concerns over funding and recognition attached to their multiple engagements. Although Trends 2024 does not fully explore such risks, it offers an overview of the policies, support and challenges that HEIs identify for the education and third

missions, as well as in a transversal area that has proved its importance across all missions and areas of activities, namely the question of equity, diversity and inclusion.

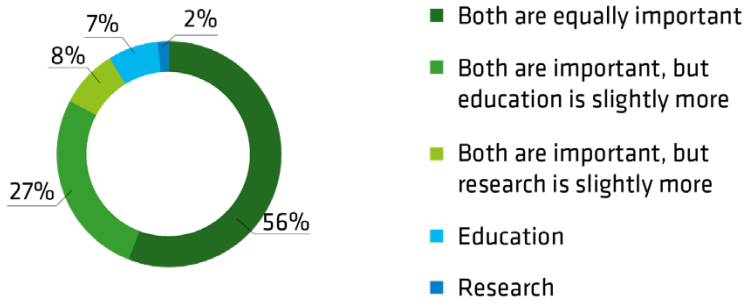
3.2. INTERCONNECTING EDUCATION AND RESEARCH

When asked about what they see as their primary mission, only a few institutions indicate a focus on either education (7%) or research (2%). Most institutions find both missions important, though with slight nuances. The majority of responding HEIs (56%) identify education and research as equally important missions to them. Another 27% see both as important, but education as slightly more important, whereas 8% identify research as slightly more important. This could challenge the view that there is a continued imparity of esteem between research and education, to the detriment of the latter. It would also align with the observation that the role of education is growing in importance, as stated in Trends 2018 (Gaebel and Zhang, 2018). However, the picture looks less straightforward when considering the effects of the said imparity of esteem; the issue is further analysed in section 3.4.

In addition, the profile of the institution plays a role. A significant proportion of universities of applied sciences tend to see education as more important than research (67%, compared with 27% of the overall sample), and the same goes for specialised universities, though to a lesser extent (38%). Apart from these differences, the picture is quite balanced across all institutional profiles represented in the sample.

Figure 15: Primary mission – education or research

Q7. What would you see as the primary mission of your institution? Please select one option. N=488.



The connection between research and education is also reflected in the education offer. Research experience is part of all or most master's programmes in a majority (59%) of HEIs and in at least some of the master's programmes in another 23% of HEIs. A slightly smaller proportion of HEIs (45%) confirm that this is the case for all or most of their bachelor's programmes, with another 34% offering at least some bachelor's courses that include research experience. Only 2% of HEIs indicate that no research experience at all is provided in their study programmes, with half of them planning to change this.

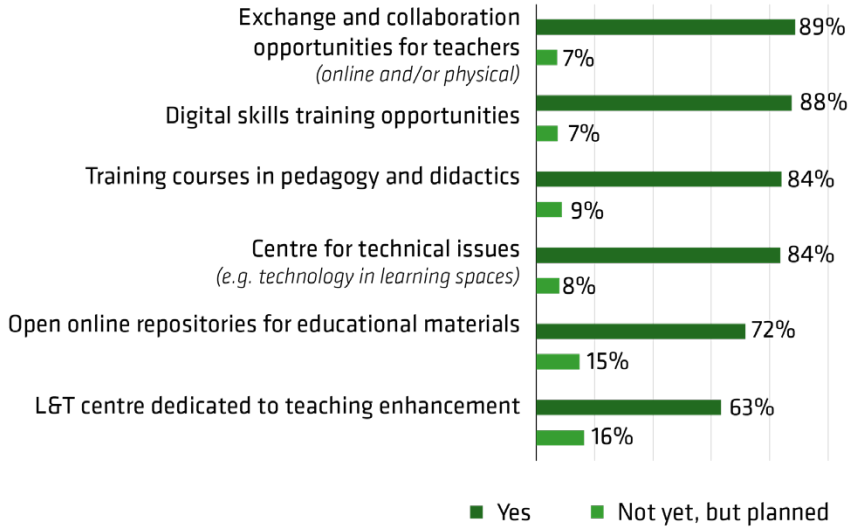
Asked about concrete measures to enhance the link between research and education, most institutions refer to support services for teachers, which 71% of HEIs provide at institutional level and 21% in addition or alternatively at faculty level. The situation for measures to promote the interrelation of research and education in academic careers is quite similar: these are in place at 70% of HEIs at institutional level and at 19% at faculty level. In addition, policies and measures to ensure that curricula and courseware are updated with recent research results and methods are in place at institutional level at 60% of HEIs and at 22% at faculty and programme level. Funding for initiatives that enhance the link between research and education is available at most institutions at institutional level (57%), while 17% of institutions provide this at the level of some faculties.

3.3. SUPPORT FOR TEACHING

The majority of institutions support their education mission with various measures. Most commonly, they facilitate exchange and collaboration opportunities for teachers. Generally, institutions already offer training opportunities in pedagogy and didactics (84% of HEIs) as well as in digital skills (88%), or plan to do so in the future. At 44% of institutions that offer such training, it is compulsory for all teaching staff (including those not permanently employed). Some courses target specific categories of staff, such as newly hired staff (30%), doctoral candidates (25%), and early-stage researchers and teachers (19%). By comparison, in 2018, only 37% of responding institutions had a compulsory staff development offer in place, but more often this depended on the profile of staff: half of these HEIs targeted newly hired staff and another third early-stage teachers and academics (Gaebel and Zhang, 2018, p. 72).

Figure 16: Support to teaching staff

Q33. Does your institution support teaching staff with: ... Please select one option per line. N=483.



Trends 2018 correlated the growing importance of the education mission, which was visible through institutional learning and teaching strategies, and the existence of institutional-level learning and teaching centres (*Ibidem*, p. 19). A 2024 report further explores the diverse forms and approaches that such centres can take: some have been started at faculty level, while others were established for the provision of technical support. The report also suggests that there is growing alignment in the tasks and functions that these centres fulfil in support of the institution's learning and teaching community (Costa and Peterbauer, 2024). According to Trends 2024 data, centres that provide technical support to teachers are still more common than actual learning and teaching centres that focus more on pedagogical aspects. Slightly fewer than two thirds of the surveyed institutions have a learning and teaching centre, and another 16% are planning to install one. This general picture is comparable with the data collected under Trends 2018 (Gaebel and Zhang, 2018, pp. 18–19). However, some country variations can be observed in the Trends 2024 sample:

- All HEIs that answered the Trends 2024 survey in Belgium (FR), the Netherlands and the UK have learning and teaching centres in place. This is also the case in over 80% of institutions in Austria, Finland, Germany, Ireland, Kazakhstan, Norway, Sweden, Switzerland and Türkiye.

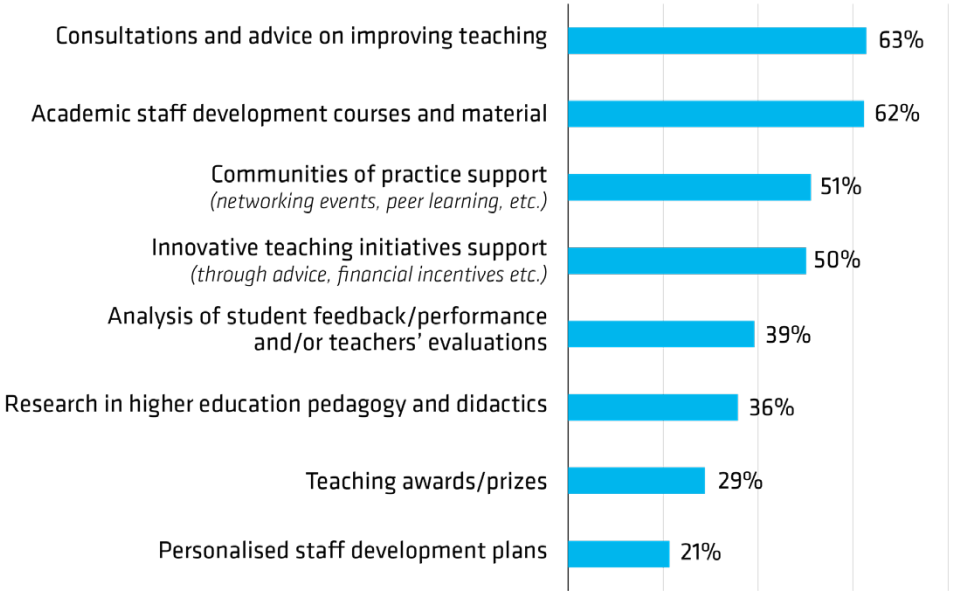
- Conversely, only one third of institutions in Czechia have learning and teaching centres, while 42% of institutions state that they do not, and do not plan to have them.

- By contrast, in some other countries there is a clear development trend, with half of HEIs in Albania, 57% of HEIs in Croatia and 40% of HEIs in Bulgaria planning to create one.

What are the functions and tasks of these learning and teaching centres? About two thirds of institutions indicate that they provide academic staff with development opportunities and materials (62%), and with consultations and advice (63%). About half of the centres also help to facilitate communities of teaching practice and support innovative teaching initiatives in various ways. Other functions, such as analysis of student feedback and staff evaluations, research on learning and teaching, and the organisation of teaching awards, are less common, and only a fifth of institutions' learning and teaching centres offer individualised staff development plans. This does not automatically imply that such individual plans do not exist: they may be organised differently and handled by other structures at the institutions (such as faculties and departments).

Figure 17: Role and function of learning and teaching centres

Q33.2. If your institution has a learning and teaching centre/unit, what is the centre/unit's role and function? Please select all applicable options. N = 403.



Trends 2018 suggested a gradual increase and upgrading of such centres and highlighted a correlation between their existence and institutional strategies for learning and teaching (Gaebel and Zhang, 2018, p. 19). But Trends 2024 data does not confirm this point: generally, the proportion of institutions having such centres and the tasks of learning and teaching centres remain very much the same as in 2018, with a very minor decrease in the proportion of centres providing analysis of student feedback and/or results of teachers' evaluations (45% of them in the 2018 sample, compared with 39% in 2024).

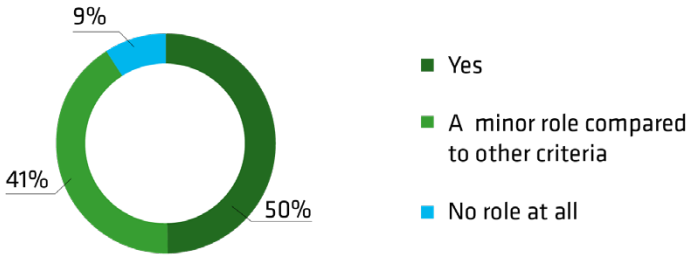
3.4. RECOGNITION OF TEACHING IN CAREER ASSESSMENT

Support provided by learning and teaching centres and other incentive measures can usefully contribute to the enhancement of learning and teaching. However, to reach their full potential they need to be embedded in an institutional (and national) environment that recognises the intrinsic value of teaching, notably in academic assessment and career progression. However, as amply demonstrated in the available literature and in practice, academic assessment and career progression are still predominantly based on research-oriented and quantitative indicators (see, for example, OECD, 2024, pp. 10, 33). The overall imparity of esteem for teaching has been repeatedly pointed out by HEIs and academics (see, for example, te Pas and Zhang, 2019; Zhang, 2022, pp. 45–47; EUA, 2022b, pp. 14–16). Teaching performance, when assessed, counts much less than research for the advancement of careers.

The picture provided by Trends 2024 data is mixed in this regard. Only at 9% of institutions does teaching performance evaluation play no role at all, while the majority of institutions consider it in some way in career progression, which may sound relatively positive. However, at another 41% of institutions it is accorded only minor importance compared with other, mostly research-related, criteria. Comments of individual survey respondents also provide a more nuanced picture: while some praise progress made on institutional regulations for better recognition of teaching, others point to rather varied implementation practices at faculties and departments. As an example, teaching performance evaluations can be taken into account only if negative – in other words, bad evaluations can impede career progression, but good ones do not boost it.

Figure 18: Role of performance evaluations in career progression of teaching staff

Q34. Do teaching performance evaluations play an important role in the promotion and career progression of teaching staff? Please choose one answer. N= 484.



Student feedback remains by far the most widespread practice for assessing teaching: it is in place at 97% of institutions, which is comparable to the percentage recorded in 2018 (98%, Gaebel and Zhang, 2018, p. 69). However, as also reported in Trends 2018, many institutions mention that their teaching performance evaluation approaches require improvement. This is confirmed by other studies: while collecting student feedback can be useful to teachers as a formative assessment tool to improve their practice, it may not be fully relevant for making decisions related to their careers (Harrison *et al.*, 2020). In fact, a more appropriate tool could be portfolios that include a variety of other elements, such as self-reflection about teaching practices and observations from peers, thus balancing evidence-based with context-relevant contributions (*Ibidem*).

Trends 2024 data confirms that such measures are already in use at many institutions:

- Portfolios in which teachers document their teaching practices (pedagogical material, forms of student assessment, etc.) are used by 43% of HEIs, with another 10% planning to introduce them.

- Peer feedback systems, where teachers provide feedback to each other, are used by 34% of HEIs, with another 11% planning to introduce them. In Trends 2018, 57% of institutions stated that they use such systems, either throughout the institution or in some faculties.

In Trends 2018, institutions identified as the top obstacles for improving learning and teaching the lack of financial resources (by far the most common obstacle), and the lack of recognition for teaching in career progression. The situation has not changed in 2024, although a slightly lower proportion of institutions cite the lack of recognition as the top obstacle.[11] While things might be moving towards better recognition for teaching, this is not yet a sea change, as either measures are not in place or not yet fully implemented, or their impact is not yet visible. However, since 2018, the policy context in Europe has evolved and awareness around more balanced weighting of academic tasks has increased: notably, in 2022 the European Commission, in its European Strategy for Universities, clearly recognised the need to "tackle in a systemic and comprehensive way academic careers" and to promote career appraisal models that "take into account the variety of activities of academics, such as teaching, research, entrepreneurship, management or leadership" (EC, 2022, p. 7). Following up on this strategy, in March 2024 the European Commission published its proposal for a Council Recommendation on attractive and sustainable careers in higher education, which, among other points, explicitly aims to "promote, recognise and value diverse academic roles and tasks, including innovating and effective teaching" (EC, 2024). In the same period, the Coalition for Advancing Research Assessment (CoARA) was founded in December 2022. While CoARA's overall vision is that the assessment of research, researchers and research organisations recognises the diversity of outputs, practices and activities in research, there is one working group under CoARA that explores the reform of academic career assessment, with the aim of broadening the reflection on research assessment, taking into account the full range of work conducted by academics, including in learning and teaching.[12] The 2024 Bologna Process Implementation Report also shows that 27 of 48 higher education systems do have top-level policy documents that specify criteria for teaching performance to be considered for the recruitment and promotion of academic staff (EC/EACEA/Eurydice, 2024, p. 181, Fig. 5.17).

Overall, there seems to be a growing shared understanding that current processes for academic assessment need revision and change (see, for example, Saenen *et al.*, 2021). It is likely to take years until the reform proposals that

11 See Gaebel and Zhang, 2018, p. 71. In 2018, aggregated answers gave 19% of HEIs identifying this as the most important obstacle, 15% as a very important obstacle, and 13% as an important obstacle. In Trends 2024, 14% of HEIs identified this as the top obstacle, 13% as the second and 16% as the third.
12 For more information, see https://coara.eu/coalition/working-groups/wg-reforming-academic-career-assessment//

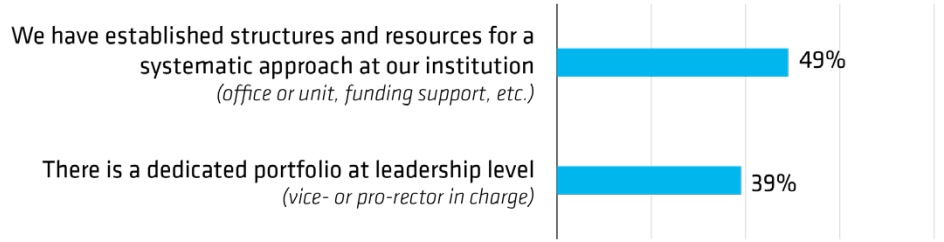
are presently emerging are fully implemented and yield tangible impact on individual academics' career. Nevertheless, increased awareness about the crucial importance of careers that grant a fair balance between academic missions is a positive departure point. The relevance of such evolutions is confirmed by international literature, demonstrating that academics tend to value balance between teaching and research, and that, with certain variations of perceptions between countries, the combination of the two remains most appreciated (e.g. Teichler *et al.*, 2022, p. 91).

3.5. THE INCREASING IMPORTANCE OF THE THIRD MISSION

Over recent years, the third mission – service to society – has grown in importance in the higher education sector at both policy and institutional levels. This is confirmed by Trends 2024 data, with 83% of institutions considering it to be highly important. About two thirds of institutions also define service to society as a strategic priority for them. There is a clear upward trend: 28% of HEIs describe their contribution as stable and quite good, and about 70% as having increased over the past five years; 59% of institutions want their activities in this area to increase in the future.

Figure 19: Third mission and services to society (i)

Q39. (partial). How would you describe the situation of "the third mission" or "services to society" at your institution? Please select all applicable options. N = 489.

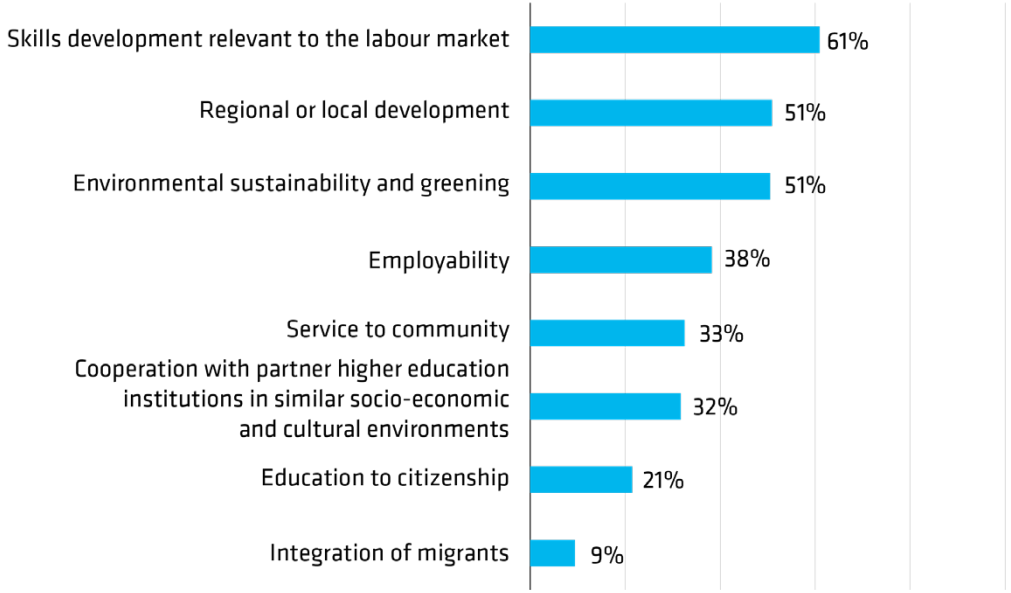


"Third mission" and "service to society" are broad terms that are largely undefined regarding activities and approaches taken. Nevertheless, there seems to be some alignment in what areas are included and how institutions engage. Over half of institutions are active in skills development relevant to the labour market (61%), in regional and local development (51%), and in environmental sustainability and greening (51%). A third of institutions engage in service to the community and cooperation with partner institutions in similar socio-economic and cultural environments.

Education for citizenship as a service proposed to the society outside of the institution is less common, with only a fifth of institutions actively engaging in this. Only 9% of institutions list the integration of migrants as part of their community engagement, addressing here migrants who are not part of the university community. A significantly larger proportion of institutions consider migration, at-risk or refugee-like backgrounds for their staff and students in their institutional inclusion policies (57% of HEIs for student policies; 34% of HEIs for staff policies) (see also Chapter 2).

Figure 20: Top three activities for community engagement and service to society

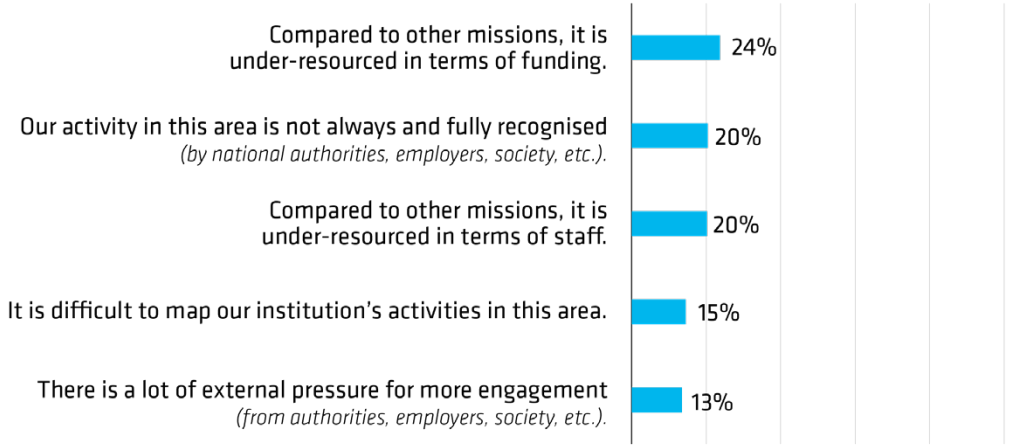
Q40. In which of the following areas is your institution particularly active? Please select the top three options. N= 486.



While the third mission is high on institutions' list of priorities and activities, organising third mission-related endeavours comes with some challenges. Only 49% of institutions have established a dedicated office to implement an institutional and systematic approach, and only 39% have a dedicated leadership portfolio. A fifth of institutions report that their activities are understaffed and a quarter report that they are underfunded compared with their other missions (education, research). The challenge of underfunding is also confirmed by the 2024 Bologna Process Implementation Report: the most common situation is that public authorities provide no funding to institutions for social engagement activities; this is the case in 29 EHEA higher education systems. In 14 systems, HEIs have opportunities to use general funding sources for such activities. In 9 systems (Czechia, France, Germany, Hungary, Ireland, Romania, Spain, Switzerland and Türkiye), additional funding is specifically provided for community engagement activities. In Romania, Spain, Switzerland and Türkiye, HEIs can benefit from both additional and general funding. The report concludes by suggesting that there is currently a relatively low level of interest in community engagement from public authorities (EC/EHEA/Eurydice, 2024, p. 150, Fig. 4.17). Respondents in the Trends 2024 survey seem to confirm this point, as a fifth of institutions find that their activities in this area are not always fully recognised by national authorities, employers and society more generally. Meanwhile, 13% of institutions are also concerned by the high degree of external pressure to increase their engagement. Finally, but importantly, some institutions find it difficult to map their third mission activities, probably due to the diversity of activities and approaches: databases or planning tools may be lacking, and some activities may also rely heavily on the initiative and commitment of individuals.

Figure 21: Third mission and service to society (ii)

Q39. (partial): How would you describe the situation of "the third mission" or "service to society" at your institution? Please select all applicable options. N = 489.



These findings concur with another aspect mentioned in the literature: academic assessment tends to recognise third mission engagement only marginally, notably because it is difficult and complex to map exactly what such third mission activities entail. Information on workload regarding service to society and, more generally, external engagement is also limited "partly due to conceptual ambiguities" (Smolentseva, 2023). The 2024 Organisation for Economic Co-operation and Development (OECD) evidence review on academic careers summarises reasons for such difficulties: external engagement may take many forms, which are impossible to compare; many activities lead to intangible outcomes that cannot be easily measured, quantified or documented; activities are not seen as being of equal importance as academic tasks in research and teaching; and the motivation to engage with external stakeholders and society may rely on individual academics' intrinsic motivation to contribute to the betterment of society (OECD, 2024, pp. 34–35). Overall, institutions rarely seem to incentivise their staff to collect data about their activities besides research and teaching – which confirms the findings of Trends 2024 regarding activities mapping around the third mission.

3.6. EQUITY, DIVERSITY AND INCLUSION

Over the past decade, equity, diversity and inclusion (EDI) and how to address it have gained importance both in higher education and in society at large. This is reflected in European and national policy developments. The 2020 Rome Communiqué of the EHEA Ministers of Education stated that "to achieve our vision, we commit to building an inclusive, innovative and interconnected EHEA by 2030, able to underpin a sustainable, cohesive and peaceful Europe. Inclusive, because every learner will have equitable access to higher education and will be fully supported in completing their studies and training" (EHEA, 2020a). The ministers also adopted in Rome the "Principles and guidelines to strengthen the social dimension of higher education in the EHEA" (EHEA, 2020b). This document enlarges the definition of the social dimension according to the 2007 London Communiqué[13] by adding that the social dimension must encompass the creation of "an inclusive environment" in higher education "that fosters equity, diversity, and inclusion, and is responsive to the needs of the wider community" (EHEA, 2020b).

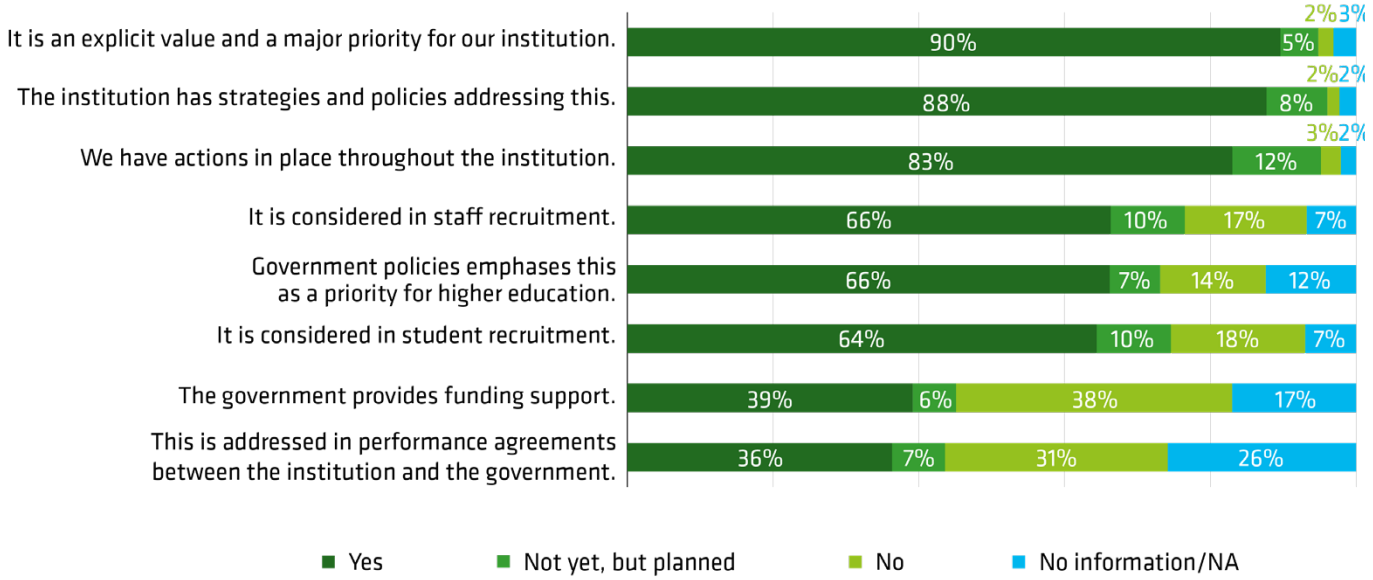
The Bologna Process Implementation Report of 2024 provides a first monitoring of these principles and guidelines, starting with an overview of the different approaches that co-exist in the EHEA. These range from higher education systems that have targeted policies and support measures for EDI to systems where support is provided to all students and staff regardless of need, or where EDI-related issues are part of the general welfare system, and with centralised or decentralised approaches to different degrees (EC/EACEA/Eurydice, 2024, pp. 119–123).

Where do HEIs stand now? For almost all institutions (90%) surveyed under Trends 2024, EDI is a major priority and an explicit value. About the same number of institutions have strategies and policies to address EDI, and another 8% of institutions plan to have these in the future. At 83% of HEIs, related actions are in place throughout the institution.

13 "[T]he composition of the student body entering, participating in and completing higher education at all levels should correspond to the heterogeneous social profile of society at large in the EHEA countries" (EHEA, 2007).

Figure 22: Equity, diversity and inclusion

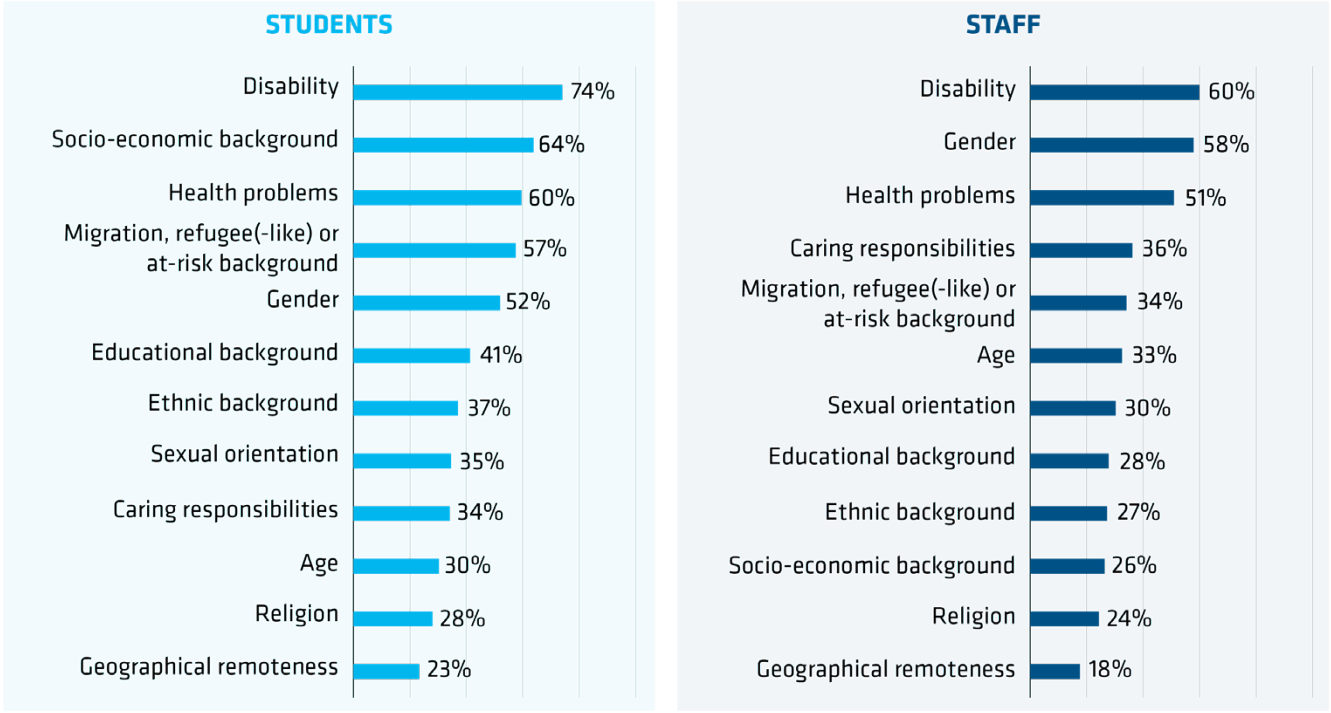
Q37. How does your institution address inclusion, equity and diversity? Please select one option per line. N=477.



Institutional policies on EDI typically include a range of different aspects, several of which are applicable to both students and staff, albeit to varying degrees. Disability is the most commonly addressed aspect, more often in policies for students (74%) than for staff (60%). In student inclusion policies, other common aspects considered are socio-economic background, health, migrant, at-risk or refugee-like background, and gender. The picture is slightly different for staff policies, where the most common aspects – apart from disability – are gender, health, caring responsibilities, migration, age and sexual orientation. Apart from age, gender and caring responsibilities, more institutions seem to pay attention to inclusion policies for students than to those for staff. This point could relate to, and mirror, national policy contexts, as there are more countries with a national and targeted strategy addressing the social dimension for students than for academic staff (EC/EACEA/Eurydice, 2024, p. 122, Fig. 4.1).

Figure 23: Aspects addressed in inclusion policies

Q38. What aspects are considered in the inclusion policies and measures of your institution? Please select all applicable options, distinguishing between students and staff. N=467.



There are also noticeable differences between countries, as illustrated by the following examples:

- All or almost all institutions in Ireland have student inclusion policies that address migrant, at-risk or refugee-like background, ethnic background, sexual orientation and religion. Irish institutions also need to gather data and regularly report on their achievements.

- Besides Ireland, inclusion policies based on students' religion are far more common in the UK (79% of HEIs) than in France (8%) or Spain (9%).

- Student inclusion policies based on ethnic background are in place at almost all Swedish institutions (93%), and in the majority of institutions in the UK (89%), Romania (77%), the Netherlands (64%) and Norway (55%). However, they are not widespread in Spain (14%), France (12%) and Portugal (11%).

- Inclusion policies for students with a migrant, at-risk or refugee-like background are also common in Norway (91% of HEIs), Finland (80%), the UK (78%), Slovakia (75%) and Italy (73%). They are much less likely to be in place in Bosnia and Herzegovina (33%), Sweden (31%), Bulgaria (30%) and Austria (25%).

- Student inclusion policies addressing sexual orientation can be found at the majority of institutions in Sweden (85% of HEIs), the UK (78%), Finland (60%), Slovenia (57%) and Switzerland (54%). They are much less common at institutions in France (20%), Kazakhstan (20%), Moldova (20%), Portugal (16%) and Georgia (13%).

In their comments, individual institutions also highlight the impact of national regulations. For instance, whereas in some systems, national regulation addresses many aspects of EDI (though that does not automatically imply actual impact), in others, legislation prevents specific considerations related to religion, sexual orientation or ethnic background to be addressed. The Bologna Process Implementation Report provides an overview of how EHEA countries conduct their monitoring on student characteristics, which the large majority of education systems in the EHEA (42 out of 49 systems) do upon entry into higher education (EC/EACEA/Eurydice, 2024, pp. 133–134, Fig. 4.7 and 4.8).

Concrete measures to support EDI have increased in student and staff recruitment. In comparison to an EUA study of 2019 (Claeys-Kulik *et al.*, 2019), the proportion of institutions that now consider EDI in recruitment processes is now 20 percentage points higher. More inclusive recruitment policies are much needed in view of the persisting imbalances and disparities among academic staff. According to an OECD evidence review on academic careers, while most institutions in Europe are within the 40–60% range for gender balance among academic staff overall, there are major variations – to the detriment of women – when it comes to more senior positions and between individual institutions and countries (OECD, 2024, pp. 52–53).

Where data is available, it also confirms the role of social background, as academics from less advantaged backgrounds are more likely to lack relevant social capital and networks that help them to navigate integration into academia and employment opportunities, especially in elite institutions. For example, in the UK only about 14% of academics have a working-class background (OECD, 2024, p. 58). Academics with a minority ethnic background are also found to be underrepresented in academia and face challenges such as marginalisation, exclusion, othering and racism. While institutions and policy makers have encouraged and supported greater diversity in academia, there are also difficulties with the retention of academics with such backgrounds (*Ibidem*). Furthermore, the latest data available (2020/21) from the Higher Education Statistics Agency in the UK confirms that only about 5% of academic staff are recorded as disabled, and several studies have demonstrated how challenging academia can be for individuals with disabilities and chronic illnesses, and for those who are neurodivergent.

Overall, while there is a real increase in the proportion of institutions with recruitment processes that take into account EDI, strategies and policies have yet to build an environment that makes inclusive recruitment, retention and progression in academia a reality. This will also require system-level attention and support: about two thirds of HEIs surveyed under Trends 2024 confirm that their governmental policies emphasise EDI as a priority for higher education.

However, a major challenge in this process is the lack of specific funding to support institutional actions. As already shown in a 2019 EUA study, 69% of HEIs highlighted the need for more public investment (Claeys-Kulik *et al.*, 2019, p. 40, Fig. 22). Trends 2024 data suggests that not much has changed since. Although many institutions confirm government policies on EDI, only 39% of them indicate that the government provides (specific) funding support, with an additional 6% stating that this is planned. Surprisingly, 17% of institutions do not even have information in this regard.

Although EDI may not receive earmarked or dedicated budget directly, this does not necessarily mean that EDI-related policies and activities are not funded. The point of funding needs to be read in conjunction with the funding methods in the respective higher education systems, which are diverse and complex, each of them potentially impacting on institutional agendas on EDI. According to EUA's Autonomy Scorecard, the main public funding model in Europe is block grants to HEIs, which come with a great variety of modalities (Bennetot-Pruvot *et al.*, 2023, p. 29). Principally, universities receive their basic public funding to cover their core activities through a block grant, which covers several categories of expenditure, leaving it to them to divide and distribute it internally according to their needs (with some restrictions that may still apply). However, in some systems, the very allocation of funding may still depend on the fulfilment of objectives defined at policy level, which may include EDI-related targets. In the Trends 2024 survey, just over a third of HEIs have EDI-related targets included in performance agreements with their government or funding authority. The 2024 Bologna Process Implementation Report maps the variety of funding situations in EHEA countries, with only eight higher education systems allocating funding to HEIs that meet targets in widening access, increasing participation or completing higher education, in particular for underrepresented, disadvantaged and vulnerable groups.

Another aspect is student grants and loans. In some systems these are universal, accessible to any student with no other criterion than student status, thus benefitting disadvantaged students without specifically targeting them; in other systems they are means-tested, thus specifically targeting disadvantaged students. The latter arrangement is widespread in the EHEA, with 34 systems providing them, while universal grants are in place in seven systems (Azerbaijan, Denmark, Finland, Luxembourg, Malta and Norway). The majority of EHEA countries also support institutions through indirect financing, which is understood as a public subsidy to students for accommodation, transport, meals, study material or technology equipment (EC/EACEA/Eurydice, 2024, pp. 138–141).

In conclusion, there is no simple answer to the question of whether and to what extent the current level of public funding, targeting either institutions or individual students, sufficiently and adequately serves the institutions' priorities and the increasing attention towards better implementation of EDI policies. Nevertheless, it is obvious that more could be achieved with more funding.

Finally, in the Trends 2024 survey, some institutions share concerns about how valuable EDI agendas are in terms of implementation, and of creating or fostering the appropriate environment for equitable, diverse and inclusive higher education. As noted by one respondent, the debate may still focus on whether the aim is to create "equal opportunities" or "equal outcomes", instead of shifting the focus towards the actual implementation of policies: "We are at risk of making superficial choices, focusing on visible differences between people rather than on the implementation of the [commitments under the Bologna Process]". This confirms the conclusions of the 2019 EUA study, which stated that while many valuable initiatives are in place, "the challenge for taking a qualitative step forward [...] is to connect all the dots, creating linkages within an institution as well as between institutions and systems. The goal must be a holistic strategy ultimately strengthening the inclusiveness of European higher education systems" (Claeys-Kulik *et al.*, 2019, p. 44). In this regard, it will be important to move forward from the present discourse on EDI as a challenge to be solved towards EDI as a precondition for quality and excellence. The 2019 EUA study concluded that as a number of prominent universities have already taken this position, realising that by ensuring equitable treatment, they improve their learning environment and research, "if the university sector as a whole could embrace this notion fully, this would be beneficial to all stakeholders and also for society" (*Ibidem*).

Chapter 4

Students at the centre

Main points

- Most institutions in the EHEA report increasing or at least stable student numbers for the past five years. But for some countries, a considerable number of HEIs report decreases in the number of bachelor's and, to a lesser extent, master's students. In particular, many Central and Eastern European institutions project a continuing decline in their domestic student numbers, a trend that is confirmed by the 2024 Bologna Process Implementation Report.

- In the same period, the student population has become more diverse, with increased international student numbers and increased or stable numbers of mature learners at most institutions. HEIs in most EHEA countries expect this trend to continue. Most institutions have strategies in place for international student recruitment.

- Most institutions use learning outcomes, which are fully implemented either for all courses (71%) or for at least some courses (18%). These numbers suggest a stagnation in implementing the learning outcomes approach since 2018. There are also noticeable differences, as in some countries learning outcomes are the norm at all institutions, while in others implementation is mostly partial and not for all courses.

- Compared with 2018, HEIs seem to face fewer problems in implementing learning outcomes. In 2024, the majority of institutions report either never having had problems, or having managed to solve them. The most persistent problem is insufficient resources for supporting staff in learning outcome implementation. Interestingly, institutions with partial implementation of learning outcomes are more likely to face problems than those that have fully implemented them. However, even HEIs in matured systems where learning outcomes have been fully implemented still face some issues, which may have evolved in nature since the phase of introducing learning outcomes.

- Students' and staff's demand for blended learning is reported to have increased. However, after the pandemic, students seem to be mostly back on campus. On average, 79% of students in the EHEA are studying with a physical presence on campus, 9% study off campus, and 12% combine the two. But the very meaning of studying on campus may have evolved since the pandemic, as in-person presence on campus can encompass a mix of study modes, from physically attending a class to online learning undertaken at campus facilities.

- By 2018, 80% of surveyed HEIs in the EHEA had already seen a need for more flexible provision for degree programmes. Nowadays, over half of institutions report that there has been an increase in their flexible learning offer over the past five years. The most common way to offer flexibility is through optional courses. Most institutions also allow students to revise their choice during their studies, and grant flexibility in their time-to-degree. However, the overall share of institutions granting study flexibility through concrete steps in learning and teaching has not increased, but rather has decreased compared with Trends 2018.

- Almost all institutions have measures in place to support students' employability: guidance and counselling services, job and career fairs, recruitment events, work placement and internship opportunities, integration of transferrable skills and entrepreneurship into curricula, and/or creation of incubators for student start-ups. Data suggests that compared with the bachelor's graduates themselves, HEIs are much more optimistic regarding their preparedness for the labour market.

This chapter gathers data on how HEIs in the EHEA see the evolution of their student population over the past five years and what they expect for the future. Overall, the student body is likely to become even more diverse in the coming years, with institutions predicting international and mature student[14] numbers to rise. Are institutions prepared for managing and providing flexible learning that can accommodate diverse student experiences? Data from Trends 2024 provides some insight on the state of implementation of learning outcomes, use of study modes, measures to enhance flexibility in learning for students, and support for the employability of future graduates.

4.1. THE STUDENT POPULATION

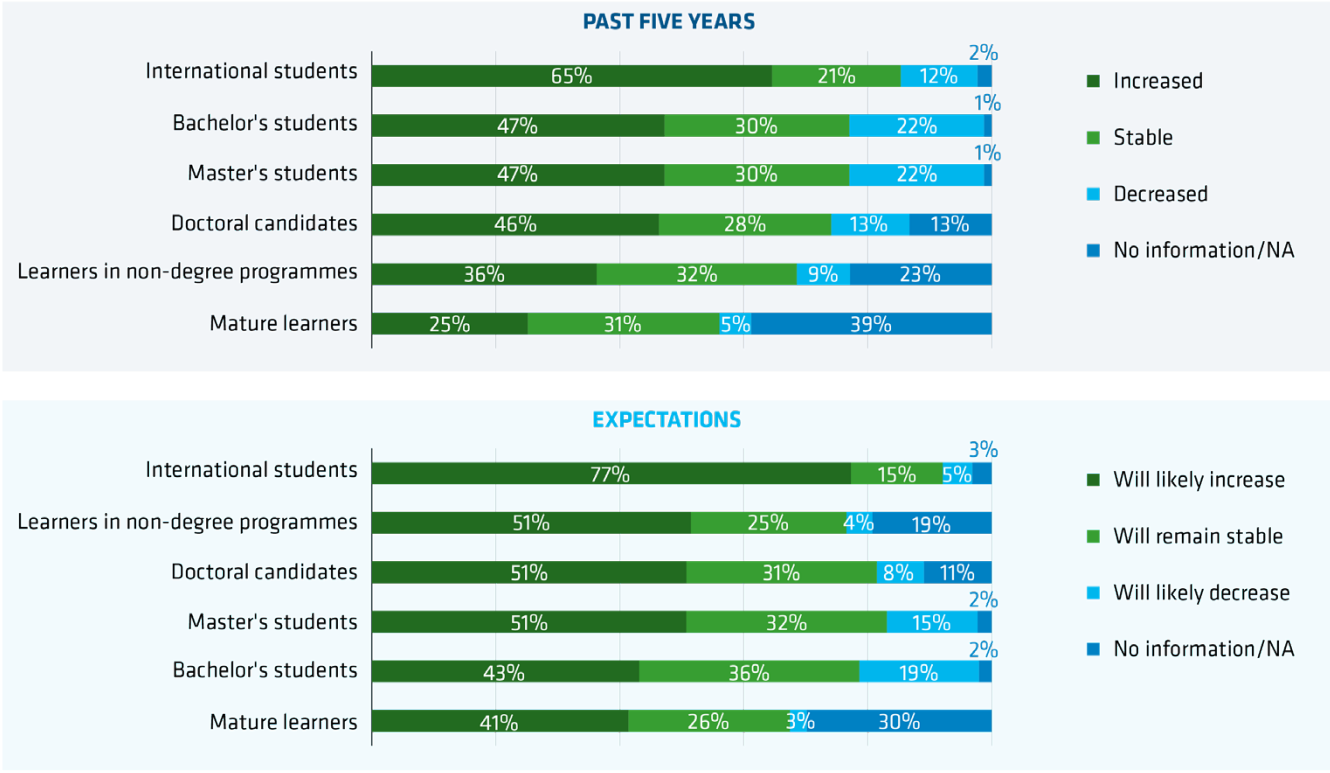
In the EHEA in 2020/21, 59% of tertiary education students were enrolled in bachelor's study programmes, 22% in master's programmes and 3% in doctoral programmes (or equivalent) (EC/EACEA/Eurydice, 2024, p. 22).

Almost half of the institutions confirm increased numbers and about 30% stable numbers of enrolment at bachelor's, master's and doctoral levels over the past five years. At most institutions, international student numbers contribute to this, as they either increased (at 65% of institutions) or at least remained stable (21%). The 2024 Bologna Process Implementation Report, comparing 2015/16 with 2020/21 statistics, confirms an increase of the student population in tertiary education in more than half of the EHEA countries, with some large systems (Türkiye and the UK) increasing by more than 20% (Ibidem, p. 23). Various different factors may have come into play, such as labour market changes, system- and institutional-level policy reforms fostering interest in tertiary education study, and improved institutional capacities to absorb and sustain higher student numbers. Interestingly, the report concludes that the Covid-19 pandemic "had no negative impact in 2020/2021 on the demand for higher education, as enrolment rates in most EHEA countries continued to grow" (*Ibidem*, p. 25).

14 In the Trends 2024 questionnaire, "mature students" are defined as learners who enter higher education for the first time with a delay of more than 24 months after leaving school.

Figure 24: Past and future trends in student enrolment

Q17. How has the student population changed at your institution in the past five years? Please select one option per line. N=487. & Q18. How do you expect the student population to change at your institution in the next five years? Please select one option per line. N=487.



For the future, about half of HEIs predict an increase for the master's and doctoral cycles, while approximately another third predict stability. For bachelor's programmes, expectations are more mixed, with 19% of HEIs predicting a decrease. As bachelor's students account for almost 60% of the total EHEA student population, this is quite significant, and calls for close monitoring by HEIs and higher education authorities.

This is not an entirely new development, as 22% of HEIs report a decrease in the numbers of bachelor's and master's students over the past five years, with some alarming country trends.

Table 5: Countries with decreasing student numbers

Q17. How has the student population changed at your institution in the past five years? Please select one option per line. N=487.

	Decrease in bachelor's students	Decrease in master's students
Bosnia and Herzegovina	56% of HEIs	50% of HEIs
Lithuania	100% of HEIs	57% of HEIs
Germany	75% of HEIs	53% of HEIs
Poland	63% of HEIs	74% of HEIs

Furthermore, about half of the institutions in Bosnia and Herzegovina and Poland note a decrease in doctoral candidates compared with the EHEA average of only 13%.

This aligns with the findings of the 2024 Bologna Process Implementation Report. Despite the upward trend in most countries mentioned above, 18 EHEA countries, all but one of them situated in Eastern Europe, report a decline in student enrolment during the past five years, some of them a reduction of as much as a fifth (*Ibidem*, p. 23, Fig. 1.2).[15] While general trends suggest an increase in the student population, other sources such as the OECD have already signalled stagnation and decline in student enrolment for the coming years for many OECD higher education systems (OECD, 2024, p. 19; OECD, 2022).

Examples from Trends 2024 data (Table 5) illustrate what institutions in some countries experience in terms of student numbers, against broader factors that may have influenced enrolment.

15 Lithuania (22%), Moldova (21%), Armenia (18%), Ukraine (17% in 2020/21, thus before the war started), Albania, Bulgaria, Poland, Slovakia (all more than 15%), Czechia, Estonia, North Macedonia (all more than 11%), Croatia, Denmark, Hungary, Latvia, Montenegro, Serbia (all between 10% and 1%).

Table 6: Factors influencing country-specific trends in student enrolment

Q17. How has the student population changed at your institution in the past five years? Please select one option per line. N=487. & Q9. Which of the following developments have impacted your institution's overall strategy in the past five years? Please select one option per line. N=485.

Country	Student numbers in the past five years	Factors that may have influenced student enrolment
Bosnia and Herzegovina	❖ 22% of HEIs report an increase for bachelor's students, against 56% reporting a decrease. ❖ No HEIs report an increase in master's and doctoral degrees; half of institutions report a decrease in these cycles. ❖ No institutions note an increase of non-degree and mature learners. A third of HEIs confirm a decrease of such learners. Most HEIs have no information regarding these groups.	Three quarters of the country's institutions state that demographic changes have been impactful for them. Half of institutions also find that migration has significantly impacted them. In addition, 78% of institutions note a significant impact due to economic developments, and half of institutions an impact due to political developments and geopolitical changes.
Germany	❖ With 3.4 million students, Germany is the EHEA country with the second highest number of students in tertiary education, after Türkiye (EC/EACEA/Eurydice, 2024, p. 22). ❖ 75% of German HEIs have noted a decrease in student numbers in bachelor's degrees, and 41% of HEIs expect such a decrease to continue over the next five years. ❖ 53% of HEIs have experienced a decrease in student numbers in master's degrees, and 38% of HEIs expect this over the next five years. ❖ By contrast, for the doctoral level, 41% of HEIs have experienced an increase over the past five years, and only 6% of HEIs report a decrease. ❖ 28% of HEIs report an increase in the number of non-degree learners. Otherwise, non-degree and mature learner populations are mostly stable, at 31% and 45% of HEIs, respectively. Very few (3% and 7%) report a decrease.	56% of German institutions find that demographic changes have had an impact over the past five years, although total student enrolment slightly increased between 2015/16 and 2020/21.

Country	Student numbers in the past five years	Factors that may have influenced student enrolment
Latvia	❖ A decrease in student numbers over the past five years occurred in all three degree cycles, with 29% of HEIs reporting a reduction at bachelor's level, 57% at master's level and 29% at doctoral level. ❖ Approximately 29% of HEIs report an increase and 43% report stable numbers at bachelor's level. ❖ 29% of HEIs report stable numbers for master's and doctoral student enrolment over the past five years. ❖ 3% of HEIs have experienced an increase at doctoral level. ❖ 71% of HEIs report an increase in international students. 29% of HEIs report an increase in non-degree learners and another 71% report stability in this category. 43% of HEIs have seen an increase in mature learners.	86% of Latvian institutions see economic developments and demographic changes as having had an impact over the past five years. 71% of Latvian institutions find that geopolitical challenges have had an impact, while 57% of institutions report the same regarding political developments.
Lithuania	❖ Decreases in the three degree cycles are a reality for most HEIs: for all HEIs at bachelor's level; for 57% at master's level; and for 43% at doctoral level. No institutions report an increase in the student population, at any of the three levels, over the past five years. ❖ By contrast, 71% of HEIs report an increase in non-degree students and 29% an increase in mature learners. 71% of HEIs report an increase in international students over the past five years.	All responding institutions find that demographic changes have significantly impacted them. 71% of institutions see political changes as an impact factor, although it is not clear whether this plays a role in decreasing or increasing student numbers.
Poland	❖ Only about 20% of HEIs report stable numbers over the past five years. ❖ Most institutions report decreases in student numbers for bachelor's (63%) and master's degrees (71%). ❖ While 23% of HEIs note an increase in doctoral candidates over the past five years, 46% report a decrease. ❖ Most HEIs report stable numbers for non-degree and mature learners. Only 19% of Polish institutions observe an increase in non-degree learners, and 12% observe the same for mature learners. 39% of Polish HEIs note a decrease in non-degree learners.	59% of Polish institutions see demographic changes as having significantly impacted them over the past five years. The Bologna Process Implementation Report confirms the general decrease in student enrolment in the country.

What are the reasons for the past and predicted future decreases in student numbers? Institutional-level data from Trends is not well suited for exploring this, as student enrolment can depend on multiple and diverse factors that may not affect all institutions in a country in the same way, depending on their location, reputation, specialisation and study programmes offered. Ukraine is, of course, in a unique situation, and 80% of Ukrainian institutions state that migration has significantly impacted them, presumably because of the outgoing flow as a direct consequence of the war. But in the case of Lithuania, for instance, all institutions report a decrease in the number of bachelor's students, though probably by differing amounts. In Bosnia and Herzegovina, Latvia and Poland, despite a decrease in the total national student population, some universities continue to report increases.

Overall, there are likely to be different causes for decreases. Negative demographic developments resulting in decreases in secondary school leaver cohorts is a common factor. But economic developments, the labour market situation, general living conditions, and the situation regarding study costs and conditions may all contribute to migration within and between countries.

For the EU, in 2023 the European Commission proposed new measures on skills and talent[16] to secure its share in what is perceived as the "global race for talent". This includes improved and accelerated recognition approaches and enhanced "attractiveness of the EU as a learning destination for talent from third countries, in line with the geopolitical dimension of the European Education Area".[17] Recruiting more international students would be one strategy for counties and institutions in countering decreasing domestic enrolment numbers and the general demographic downturn, potentially with increasing levels of competition. While the race for talent and efforts to attract students are not new, the situation may become even more competitive, both between Europe and the rest of world, and within the EHEA and the EU.

In this context, according to Trends 2024, only a few institutions across the EHEA have seen their international student population decrease over the past five years, although there are particularly high percentages in Kazakhstan (60%) and Ukraine (80%). The vast majority of HEIs not only confirm an increased (65% of HEIs) or stable (21%) international student population over the past five years; they are also confident that numbers will continue to grow (77%), or at least remain stable (15%). This aligns with the high priority that internationalisation and global outreach represent for 83% of surveyed HEIs across all EHEA countries. However, this might also be an optimistic expectation, in anticipation of declining domestic enrolment numbers. Trends 2024 data also confirms that almost all HEIs have recruitment strategies in place to attract talent, first and foremost as part of their internationalisation efforts. Chapter 6 further elaborates on internationalisation trends in the EHEA.

Apart from international students, mature students are another group that could contribute to the changing numbers and composition of student enrolment, and possibly of the study offer. A quarter of HEIs report an increase in the enrolment of mature learners,[18] and another 31% note stable numbers for this population. But 41% of HEIs also expect the enrolment of mature learners to increase over the next five years, while another 26% expect stable numbers. The 2024 Bologna Process Implementation Report confirms that the number of adult graduates is likely to continue growing, highlighting the need for appropriate policies to support mature students. It is also likely that older students further engage in part-time studies, as demonstrated by the growing number of those in the student population who are aged 30–34, a bigger share than that for part-time students aged 20–24 (EC/EACEA/Eurydice, 2024, pp. 30–37, 49). Interestingly, Trends 2024 data shows that 39% of HEIs have no information about the enrolment of mature learners: they may not have a specific way to record whether or not a student is "mature", or have different enrolment processes for them if they are studying in non-degree programmes or courses. Addressing this shortage of information and – probably related – the lack of appropriate processes to provide such information could help institutions to developed or sharpen their recruitment strategies. Indeed, half of HEIs do have recruitment strategies for mature learners, either for the entire institution (23%) or for some faculties or departments (27%). Chapter 5 on non-degree education further analyses the enrolment of non-degree students and the enhancement of non-degree offers at HEIs. These developments are certainly also linked to growing European, national and institutional policy attention on the issue of inclusion.

16 https://ec.europa.eu/commission/presscorner/detail/en/ip_23_5740
17 https://education.ec.europa.eu/focus-topics/eea-in-the-world

18 In the Trends 2024 questionnaire, "mature learners" are defined as "learners who enter higher education for the first time with a delay of more than 24 months after leaving school".

As mentioned in Chapter 2, many institutions also consider EDI in their recruitment strategies with a view to widening participation. About two thirds of institutions have strategies in place to recruit students from diverse backgrounds such as:

- socio-economically disadvantaged backgrounds (at 76% of HEIs)
- those with disabilities (68%)
- refugee(-like) backgrounds (68%)
- non-traditional study paths, such as part-time students (62%), mature learners
- without standard entry qualifications (45%).

Many institutions also consider gender in their recruitment strategies and are more likely to have dedicated strategies in place to attract female students (57% of HEIs) than male students (39% of HEIs).

However, Trends 2024 data cannot confirm any clear correlation between institutions reporting declining student enrolment over the past five years and the development of targeted strategies for recruitment. Therefore, the question is what the impact of reduced student numbers will be on individual institutions, and in particular on higher education systems where large numbers of institutions experience such reductions.

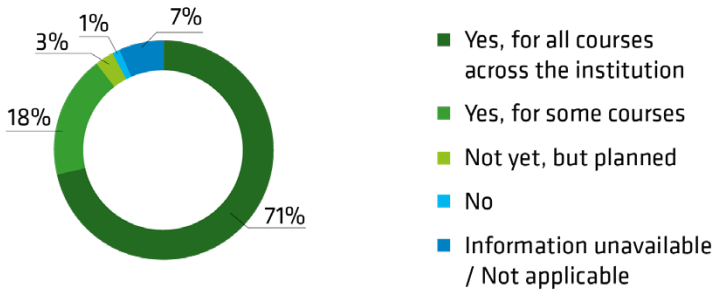
4.2. TOWARDS STUDENT-CENTRED LEARNING: THE LEARNING OUTCOME APPROACH TO CURRICULA

Since its first mention in the 2007 London Communiqué, the Bologna Process has repeatedly emphasised the importance of student-centred learning, its implementation and the related structural changes, such as the use of learning outcomes in all curricula (see, for example, Dakovic and Zhang, 2021, pp. 563–564). In Rome in 2020, the Ministers of Higher Education in the Bologna Process also adopted a set of recommendations to national authorities for enhancing learning and teaching (EHEA, 2020c), with the commitment to support HEIs further in implementing student-centred learning and teaching. As noted by the 2024 Bologna Process Implementation Report, "learning outcomes have become an integral part of the design and implementation of higher education programmes throughout the European Higher Education Area" (EC/EACEA/Eurydice, 2024, p. 169), at least at policy level. The report shows that top-level requirements or recommendations on the use of learning outcomes exist in 45 higher education systems out of 47 with data available, the only exceptions being Slovakia and UK-Scotland (*Ibidem*, p. 168, Fig. 5.7). Moreover, out of these 45 higher education systems, 42 have steering documents indicating that all higher education programmes should explicitly include intended learning outcomes.

Trends 2024 data indicates that learning outcomes are fully implemented for all courses across the entire institution at 71% of HEIs, and for some courses at another 18% of HEIs.

Figure 25: Implementation of learning outcomes

Q30. Have learning outcomes been implemented? Please select one option. N=484

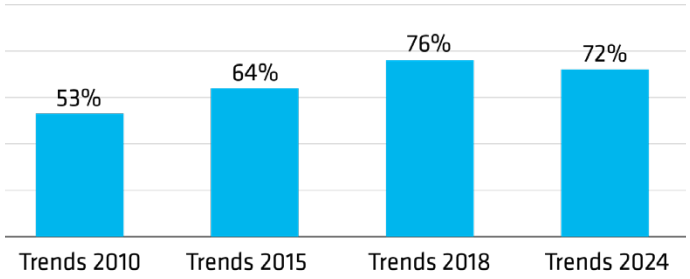


Once again, the overall picture is nuanced as there are country differences: 54% of institutions in France and 36% of institutions in Spain indicate that learning outcomes are in place for only some courses. By contrast, learning outcomes have been implemented for all courses in all surveyed institutions in Croatia, Finland, Georgia, Kosovo, Lithuania, Norway, Moldova and the UK. They are also in place for all courses in 88–89% of institutions in Austria, Bosnia and Herzegovina, Ireland, Latvia and Türkiye.

While these results confirm a more widespread use of learning outcomes across the EHEA than in previous years, their implementation appears not to have progressed, and may even have regressed. Some progress has been recorded by HEIs, notably in Spain and Italy, but not much by, for instance, French HEIs.

Figure 26: Progression in the implementation of learning outcomes since 2010

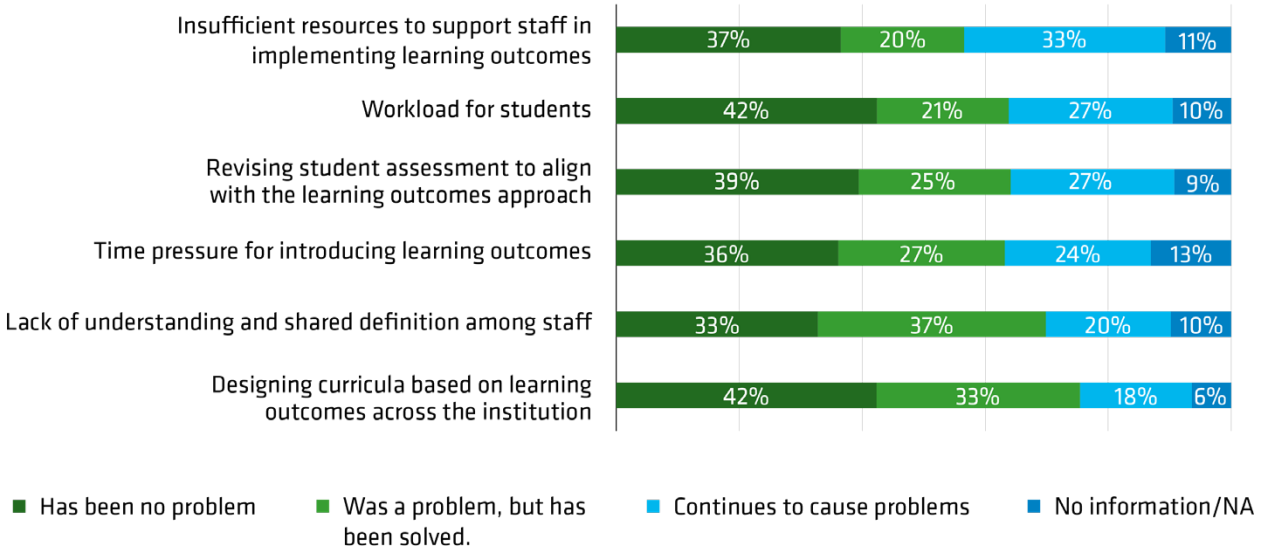
Have learning outcomes been implemented? Please select one option. Trends 2010 Q19; Trends 2015 Q36; Trends 2018 Q22, N=295; Trends 2024 Q3, N=484.



However, what has improved since 2018 is that implementation seems to have become less problematic. From Trends 2024 data, the majority of institutions (57–75%) either never had problems with the implementation and use of learning outcomes, or have managed to solve them. The most common problem that still occurs is insufficient resources for supporting staff in the implementation of learning outcomes, reported by one third of institutions, a slight improvement on 39% in 2018 (Gaebel and Zhang, 2018, p. 41). Similarly, designing curricula based on learning outcomes across the institution, alignment of student assessment with learning outcomes, and time pressure for introducing learning outcomes continue to cause problems at every fourth or fifth institution, slightly fewer than in 2018. Most institutions experience difficulties, but different ones and probably to different degrees. Overall, only 7% of HEIs note that implementing learning outcomes continues to cause problems in all the areas mentioned above.

Figure 27: Issues encountered when implementing learning outcomes

Q30.1. How would you describe issues encountered when implementing learning outcomes? Please select one option per line. N=433.



Interestingly, the type of problems that HEIs face may depend on their institutional profile. For instance, the lack of understanding and a shared definition among staff is particularly an issue at music and art schools, as 37% of these institutions notice that this continues to cause problems; meanwhile, this has never been a problem at 48% of technical universities. Also, the extent to which learning outcomes are implemented and the level of expertise on learning outcomes across the institution makes a difference. Institutions where learning outcomes have been implemented for only some courses are more likely to continue to face problems across the board than institutions that have already implemented learning outcomes for all courses. Insufficient resources to support staff in the implementation continues to be a problem for half of institutions with partial implementation, and time pressure is a problem for 43% of them.

In addition, there are some country trends for certain types of problems still experienced by HEIs:

- The lack of a shared definition and understanding among staff continues to cause problems for implementing learning outcomes at 20% of institutions across the EHEA, but at between 38% and 44% of HEIs in France, Ireland, Norway and Portugal.
- Time pressure associated with implementation is a problem for 24% of HEIs across the EHEA, but for 40% of Hungarian, 44% of Portuguese and 68% of French HEIs.
- Insufficient resources to support staff is an issue at a third of HEIs in the EHEA, but at half or more of HEIs in Belgium (FR), France, Ireland, Kazakhstan, Portugal and Ukraine.
- Designing learning outcome-based curricula across the institution is particularly problematic in France and Ireland, with 47% and 44% of HEIs, respectively, reporting so, compared with the EHEA average of only 18%.
- Finally, mastering the implications that a learning outcome-based approach has for students seems more problematic for HEIs in certain countries. In particular, the workload for students continues to be a problem for over half of HEIs in Belgium (FR), Norway, Ireland, the UK and, in particular, Portugal (75%), against the EHEA average of 27%. Likewise, revising student assessment continues to cause problems for 27% of HEIs on average in the EHEA, but to a much higher extent in Croatia (43% of HEIs), the UK (44%), France (47%), Portugal (50%), Slovenia (50%), Norway (50%) and Ireland (56%).

In conclusion, while the overall implementation of learning outcomes across the EHEA seems to have stagnated, HEIs have gradually solved problems related to their implementation. It is interesting to observe that institutions that have fully implemented learning outcomes face fewer problems than those who have done so only partially. Even in countries where learning outcomes have been implemented for all courses in nearly all HEIs, such as Ireland, Norway and the UK, a considerable number of HEIs continue to experience problems in implementation. Such problems may not be the same as those experienced in the early stages of implementation. This is also a reminder that thriving in a student-centred approach is probably a continuous enhancement-led journey.

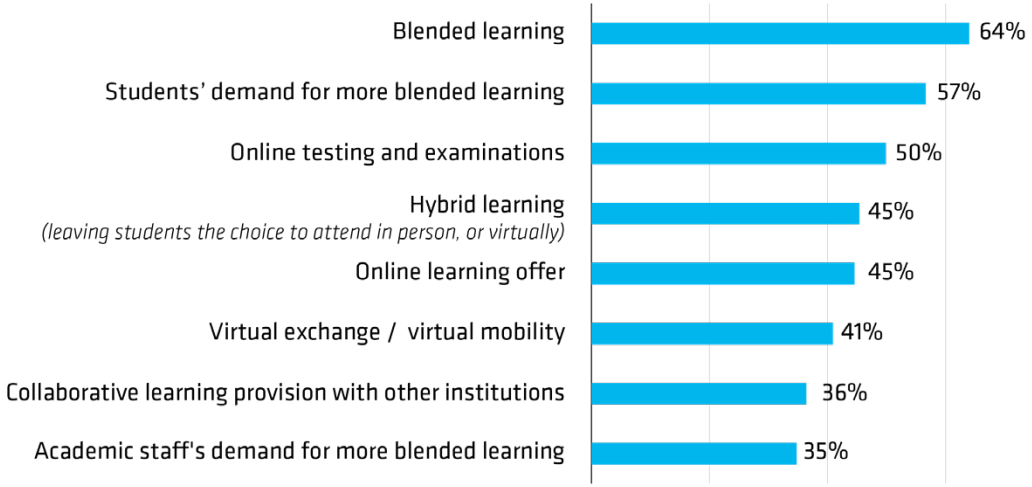
4.3. MODES OF STUDY

In 2020, the Covid-19 pandemic caused major disruption for HEIs and most, if not all, shifted overnight to "emergency remote teaching" (see, for example, Jensen *et al.*, 2022, pp. 73–74). But the pandemic was also a driver for change, and became an opportunity to live-test digitally enhanced provision and related tools, as well as to explore a better integration of blended and asynchronous study and teaching modes. All of this was not new to higher education learning and teaching, but it had never been employed in such a mainstreamed fashion.

When asked about changes post-Covid-19, a majority of institutions point to an increase in blended learning, coupled with students' demand for such learning, and to a lesser extent academic staff's demand for this.

Figure 28: Increases post-Covid 19

Q31. (partial). In 2023, do you see any increase in the following areas, compared to the situation before the Covid-19 pandemic? Please choose all applicable options. N= 486.



However, when asked what proportion, on average, of their students nowadays study on campus, online, or in a hybrid way, institutions mostly confirm a return to physical presence on campus, albeit with a more integrated use of blended and hybrid approaches at many institutions.[19] Nowadays, an average of 79% of students in the EHEA are studying with a physical presence on campus, 9% study off campus, and 12% combine the two. Slight differences can be noted depending on the institutions' profiles: almost all students (94%) at music and art schools tend to study on campus.

Table 7: Average percentage of students that study in different modes

Q32. What is the estimated percentage of students that study in the following modes? Please enter your estimate for the academic year 2022/23. Note that the sum must equal 100%. N=489.

	On average
On campus (physically present)	79%
Off campus (mainly via distance learning)	9%
Combining both (blended or hybrid)	13%

Many institutions seem to have extended their blended and online learning offer in a more strategic way, or plan to do so. But given the overall urge to return to campus life after the Covid-19 restrictions, thus allowing students and staff to reconnect with the university community, it is not yet clear how transformative the changes in study modes are. The very meaning of studying on campus may also have evolved since the pandemic, from mostly attending physical classes while on campus, towards performing various activities, including asynchronous learning and blended/online learning, while being physically on campus and benefitting from infrastructures and social interactions there. This also requires awareness from institutions of, and concrete measures towards, appropriate infrastructures and learning spaces. In this regard, 93% of HEIs surveyed for Trends 2024 confirm that they have internal policies for digital equipment and infrastructure, and already in Trends 2018, 90% of HEIs confirmed that they offered learning spaces for interaction and collaboration between students. Nevertheless, not all institutions might be in a position immediately to transform existing physical infrastructures – in particular buildings – for reasons ranging from costs to heritage protection. The actual needs of campuses for enabling physical and virtual provision as well as social interaction between students and between students and staff require continued exploration and fit-for-purpose adaptations.

19 In 2021, pre-pandemic data showed that 90% of HEIs in the EHEA had more than half of their students studying mainly on campus (Gaebel *et al.*, 2021, p. 21). Data collected cannot be directly compared with Trends 2024.

4.4. MORE FLEXIBILITY FOR STUDENTS

With the student population growing and including students from an increasing range of diverse backgrounds, in recent years pressure on HEIs has increased to enable all learners to access, progress through, and complete higher education (see, for example, Martin and Furiv, 2022). This need for more flexible provision in higher education was also confirmed during the Covid-19 pandemic. In the Rome Communiqué, the Ministers of Higher Education in the Bologna Process defined "flexible and open learning paths" as "important aspects of student-centred learning" that are "in increasing demand in our societies" (EHEA, 2020a).

According to the Trends 2018 report, 80% of surveyed HEIs in the EHEA already saw a need for more flexible provision for degree programmes, and 58% of HEIs were already offering flexible study programmes and learning paths (Gaebel and Zhang, 2018, pp. 45, 51). Trends 2024 data shows that over half (52%) of institutions have increased their flexible learning offer over the past five years. However, as mentioned in a 2023 EUA Thematic Peer Group Report, for institutions, the implementation of flexible learning and flexibility in learning paths can prove complex, as "there are no universally agreed standards, and little guidance can be found for HEIs that are struggling to identify what would work for them. Approaches may vary between HEIs in the same country and even between study programmes at the same institution" (Brekke and Zhang, 2024, p. 3). Considering the wealth of existing definitions and practices, flexibility in education appears diverse and multifaceted, though usually aligned when it comes to its aim: providing learners with autonomy over when, where and how they learn.

As regards actual implementation at institutions, two main approaches (which may well co-exist) can be distinguished:

- ***Flexibility for learning, realised within a conventional, full-time study programme.***

  This entails flexible ways to achieve learning outcomes, and flexibility for students to manage their workload, in respect of the obligation to be on-site, time-to-degree, etc. Various flexible learning and teaching approaches are used (synchronous/asynchronous modalities, blended or hybrid learning, assessment modes, etc.). The institution also needs to manage students' individualised learning paths.

  Findings from a global survey led by the UNESCO International Institute for Educational Planning show that in most countries worldwide, flexible modes to deliver study programmes have already been introduced, offering part-time study and diverse hybrid and blended learning modes. However, the quality and validation of such approaches remains a challenge in several countries (Martin and Furiv, 2022).

- ***Flexibility in the form of non-degree credits, or shorter learning provision, complementing full degree programmes.***

  This would belong to the institution's continuing education or lifelong learning offer. The Rome Communiqué of the Bologna Process mentions such offers specifically as a way to "enable learners to develop or update their cultural, professional, and transversal skills and competences at various stages in their lives" (EHEA, 2020a).

This section focuses on flexibility in the context of a study programme. Flexibility as non-degree, shorter learning provision is addressed in Chapter 5.

Trends 2024 data confirms optional courses, which students can choose, to be the most common way to offer flexibility in study programmes: 71% of respondents indicate that such courses are used across the institution, and another 26% indicate a more limited use. Students can also change their choice of such courses during their studies at 89% of institutions – again, a practice that is common either across the institutions or in a more limited way.

In 77% of institutions, students enjoy some flexibility in the time they require to complete a degree, without facing financial or other penalties; at 46% of HEIs this is common across the institution, and at another 31% for at least some parts of the institution. It is less common in certain countries, such as Azerbaijan, Croatia, France, Ireland, Latvia, Moldova, the Netherlands and Ukraine.

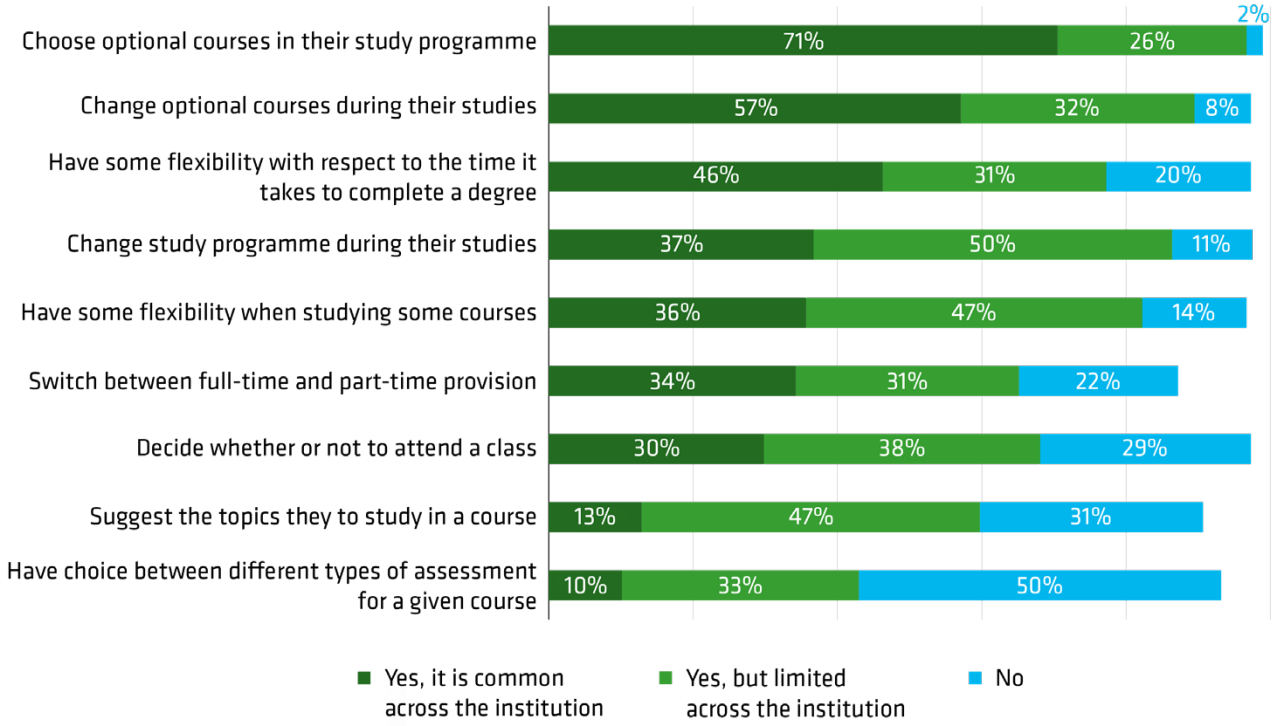
Students are also able to switch from full-time to part-time provision without any negative consequences in a third of institutions, while in another third this is possible in a limited way across the institution. It should be noted that Trends 2024 data reports the de facto situation as described by institutions, with some HEIs answering that it is possible, despite the fact that their system-level legislation does not officially enable it.

Some 82% of institutions offer students the opportunity to take courses in a more flexible order, for instance with no obligation to take course B after course A. At 60% of institutions, students can also suggest topics for some of their classes, but fewer than half of institutions (43%) grant students flexibility when it comes to choosing between different types of assessment.

Finally, over two thirds of institutions offer students the flexibility to decide whether or not to attend a class, but at 38% this is offered in only a limited way across the institution.

Figure 29: Flexibility for students

Q20. (partial). Is it possible for students to do the following, without any negative consequence (additional cost, time-to-degree, etc.)? Please select one option per line. N= 485.



There is no indication that the measures taken during the pandemic have resulted in more structured and systematic flexibility approaches in learning and teaching. When compared with the data collected for Trends 2018, there is little or no increase in flexibility, or even a decrease. For instance, compared with 2018, a slightly smaller share of institutions seem to grant students flexibility to decide whether or not to attend a class (Gaebel and Zhang, 2018, p. 48). This may be part of post-pandemic measures to ensure a return to campus and regular participation. Another explanation for a possible decrease in flexibility is sample bias: Trends 2018 focused on learning and teaching, so may have attracted more institutions giving a strong priority to these matters.

HEIs participating in the 2023 EUA Thematic Peer Group on flexible learning underlined the importance of defining what "flexibility" means and entails for the institution, and of reaching a consensus across the institutions' constituencies (students, staff, faculties, leadership). Students in particular would need to be clear what "flexibility" offers them, and what it does not. Trends 2024 data suggests that it is generally easier for institutions to offer students the flexibility to choose between different existing options than to offer them opportunities to propose their own choices, for instance by making decisions on what to learn and how to be assessed. Understanding how choices that are offered effectively contribute to make learning more flexible goes beyond the data collected by Trends 2024, and would require additional research.

4.5. MEASURES TO SUPPORT STUDENTS' EMPLOYABILITY

Monitoring the employability of graduates has been a policy objective in many countries and at EU level, particularly for assessing the quality of the education that is provided. In the 2006 Modernisation Agenda for Universities, the European Commission highlighted the importance of providing the right mix of skills and competencies for the labour market, in the context of the role that universities could play in the EU's Lisbon Agenda (EC, 2006, p. 6).[20] A 2021 EUA Thematic Peer Group report also made the point that employability, beyond the immediate needs of employers and labour markets, also entails taking into account who students will become in the future as a result of their learning journey, and how higher education can be provided for graduates throughout their careers (McSweeney and Zhang, 2021). In this regard, what institutions provide to support students' employability could take various forms, both curricular and extra-curricular, and institutions should not only focus on ensuring graduates are employed in a defined field of work, but also address employability as part of developing graduates' skills that would serve in the development of their personal and professional lives, and in their engagement with society at large (see, for example, the Eurograduate pilot study of 2020,[21] Meng *et al.*, 2020, pp. 47 onwards).

Trends 2024 data provides an overview of the range of measures in place for supporting students in their move towards employment:

- The most common measure is to offer guidance and counselling services: 94% of institutions offer these, including 10% at some faculties only.
- Job and career fairs, recruitment events and employer presentations are also quite widespread and are organised at 90% of institutions.
- Some 94% of institutions offer work placement and internship opportunities, and this is commonly done across the institution for 72% of HEIs. This shows that such placements are becoming mainstreamed across entire institutions, compared with data collected for Trends 2018, where 84% were offering it, but only 44% across the institution.
- Many institutions also adapt their curricula in order to enhance employability for their graduates. Transferable skills development is integrated into curricula by 91% of HEIs, either across the institution (59%) or in some faculties only (32%). Eighty-seven per cent integrate entrepreneurship into curricula, with approximately half of them doing this in some faculties only.
- Incubators for student start-ups are in place at 71% of HEIs, with 29% offering them in some faculties only. Another 14% of institutions are planning to set up such incubators.

20 The Lisbon Agenda of the EU, also known as the Lisbon Strategy, aimed to make the EU "the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion" by 2010 (https://www.europarl.europa.eu/summits/lis1_en.htm).

21 The Eurograduate pilot survey examined the situation in eight countries: Austria, Czechia, Croatia, Germany, Greece, Lithuania, Malta and Norway.

- Finally, 85% of HEIs monitor their alumni's employment, with 17% doing this in only some faculties. Another 11% of institutions are currently planning such a measure.

As demonstrated by the many types of measures that HEIs take, enhancing graduates' employability is a complex endeavour that requires the activation of multiple areas of action across the institution. There is no easy conclusion on how effective these measures are, as they broadly depend on their complementarity with other measures in place, including at national level, and on the general situation in the labour markets. As mentioned in the Eurograduate pilot survey of 2020, graduates' decisions on whether to enter the labour market or continue studying depend on both whether the labour market prospects are good, and how graduates assess their readiness to start working (Meng *et al.*, 2020, p. 7).

In this regard, when asked whether they find that their bachelor's degrees provide students with good prospects for employment and careers, 96% of institutions principally agree that this is the case. Data collected by the Eurograduate pilot survey suggested that graduates themselves were less positive and confident regarding their employment prospect (*Ibidem*, p. 49, data from 2016/17): fewer than half of bachelor's graduates believed that their study programme provided them with a good or very good basis to start working, with country differences ranging from 37% (Germany) to 46% (Croatia). Eurograduate also noted that in Austria, Czechia and Germany, master's graduates felt better prepared for the labour market than bachelor's students (*Ibidem*, p. 7). In addition, graduates in technology, engineering, natural sciences and health were generally more satisfied with the adequacy of their study programme for the world of work than those in other fields. HEIs may be inspired to investigate further the reasons behind their own views and the views of their graduates.

This might explain to some extent why, in the Trends 2024 survey, only around a third of HEIs state that most of their bachelor's students move into work after graduation. Another third of institutions see their bachelor's students continuing their studies with a master's degree, and for a quarter of institutions, this depends on the discipline or the study programme.

Whether or not bachelor's degrees may lead directly to the labour market also varies depending on the type of institution. According to the Trends 2024 sample, bachelor's graduates at universities of applied sciences or university colleges are twice as likely to move into the labour market following graduation than their peers in other types of institutions. Bachelor's students from music or art schools are twice as likely to continue with a master's degree than those in the overall sample.

Direct transition from bachelor's degrees into the labour market also varies widely between countries:

- In a number of countries, bachelor's graduates are at least twice as likely to access the labour market immediately after graduation than those in the overall sample: this is the case in Hungary, Lithuania, Norway, Türkiye and the UK. In the UK, all HEIs report that this is the case.

- In other countries, such graduates are at least twice as likely to continue to a master's degree than those in the overall sample: this is the case in Czechia and in the Netherlands, where about 80% of HEIs report that this is the case.

- In France, Italy and Sweden, whether bachelor's graduates directly enter the labour market strongly depends on disciplines and study programmes, with more than 40% of HEIs in these countries indicating this.

Employability and increased flexibility in higher education address the overall learning journey that can take various forms at a higher education institution – as degree education, but also, increasingly often, in the form of non-degree education. This is the subject of Chapter 5.

Chapter 5

The rise of non-degree education

Main points

- Non-degree education is a growing trend, with 70% of HEIs offering it, and a further 21% planning to do so. There are differences across the EHEA, with almost all institutions offering such education in some countries, and fewer than half of institutions doing so in other countries.
- Micro-credentials are high on the European and national policy agendas. For 75% of institutions surveyed under Trends 2024, they are part of the strategy to diversify and enlarge the education offer. Institutions perceive them as a great opportunity to innovate and enhance their education offer, including in relation to inclusion.
- Between half and two thirds of institutions identify challenges related to the implementation of such an offer. Many of these relate to the lack of adequate frameworks and processes for developing non-degree education: difficulty in defining the status of learners, establishing appropriate funding models, having offers recognised, and other legislative or regulatory difficulties. The format and design of courses may also cause problems.
- Most institutions are quite positive, but also note that it is too early to predict the usefulness and impact of micro-credentials. They are somewhat concerned about rising pressure from outside to engage more with micro-credentials, and that expectations might be too high, especially considering that a number of legal, transparency and compatibility issues at higher education system level remain to be solved.
- With a just over a quarter of HEIs still offering them, Massive Open Online Courses (MOOCs) seem to be stagnating, if not declining. With more blended learning included in curricula and a wealth of other non-degree courses available at institutions, some of which can be taken online, MOOCs, once a vehicle for exploring digital learning innovation in higher education, may become a more profiled means for outreach, knowledge-sharing and self-promotion.
- Half of institutions expect an increase in enrolment in non-degree education in the next five years, and another 25% anticipate at least stable numbers. This calls for capacity building and organisation to be stepped up in terms of business and funding models, definition of learner status, and recognition processes. Under Trends 2024, only 21% of HEIs use recognition of prior learning (RPL) for non-formal and informal learning for admission to higher education. This should be standard, particularly as it is a longstanding Bologna Process commitment.
- The growing engagement in non-degree education offers, in terms of the number of courses and learners, calls for a reflection on its complementarity with degree education offers, and, ultimately, on the role of higher education in lifelong learning.

The Bologna Process has put a strong emphasis on the reform of the degree structure, which is now deemed to have been implemented across the EHEA countries, with various models of degree programmes for either the first or second cycle (EC/EACEA/Eurydice, 2024, p. 61, Fig. 2.7, and p. 90). As mentioned in Chapter 4, the three degree cycles also attract most students in higher

education, with the biggest share in bachelors' study programmes (*Ibidem*, p. 22). Until recently there has been considerably less, if any, attention in European policy on the existing non-degree provision in higher education. This chapter explores how HEIs are adapting and adopting non-degree education provision, including micro-credentials, in addition to degree education.

5.1. THE EXISTING OFFER IN NON-DEGREE EDUCATION

In Trends 2018, about two thirds of institutions already noted a growing demand for short-term, non- degree learning opportunities,[22] and this has been confirmed in international studies (Martin and Furiv, 2022; OECD, 2021a). Since then, shorter, non-degree education has definitely become more common across the EHEA. In 2024, 70% of HEIs indicate that they offer non-degree courses and another 21% are planning to do so. In a 2020 EUA survey on digitally enhanced education, every second institution confirmed "that it provides short online courses, and a further quarter are planning to. Unlike for online degree programmes, which individual institutions usually provide in low quantity, 38% indicate that they offer more than 10 short online courses, 20% among them even more than 30 courses". The study confirmed that about half of those institutions also provided certificates that could be recognised for degree studies, and 43% agreed that the study offer was for some students an alternative to a degree study (Gaebel *et al.*, 2021, p. 23).[23]

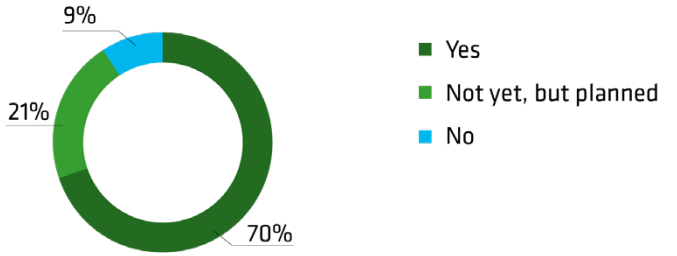
However, Trends 2024 data also points to country differences. All institutions in Belgium (FR), Bulgaria, Ireland and Lithuania offer non-degree education, as do over 85% of institutions in Latvia, Lithuania, Portugal, Spain and Switzerland. At the other end of the spectrum, about 40% of institutions in Germany and Slovenia and two thirds of institutions in Kosovo do not have such an offer, but plan to introduce it in the future.

22 This is not to be confused with the one-year short-cycle qualification that is part of the EHEA Qualifications Framework (EHEA-QF) and should be recognised by all EHEA systems, including those that do not provide it. In the EHEA-QF, it is post-secondary education, usually provided by professional education institutions; it may be designed as pre-bachelor, or recognised as part of the bachelor's (Karpíšek, 2019).

23 As the study asked for online courses only, the data is not directly comparable with the Trends 2024 data.

Figure 30: Offer of non-degree programmes or courses (learning certificates, badges or micro-credentials)

Q24. Does your institution offer non-degree programmes or courses (learning certificates, badges or micro-credentials)? Please choose one option. N=486.



Between half and two thirds of institutions also identify a number of challenges related to their offer, such as[24]:

- identifying the demand for such programmes or courses (71%)
- recognition (68%)
- issues related to fees and funding (67%)
- finding a business model (65%)
- legal and regulatory obstacles at national/system level (63%)
- credit award upon completion (61%)
- quality assurance (58%)
- format and design of such courses (58%)
- defining the status of the learner (56%; see also section 5.2 below)
- legal and regulatory obstacles within the institution (47%).

24 These percentages refer to responding institutions that answered "Yes" or "To some extent" to the question "Do you see challenges for non-degree programmes or courses in the following areas?" in the Trends 2024 survey (see Annex I, Q25).

A 2024 EUA Thematic Peer Group report on flexible learning provides further analysis on these challenges identified by HEIs. The business or funding model for non-degree education, for instance, can be a struggle for publicly funded HEIs, which are financed on the basis of their full-time student numbers, usually not applicable in more flexible provision. Another common challenge is that HEIs often lack the necessary resources for shorter courses for upskilling and reskilling. Consequently, they try to accommodate demands within existing resources and organisational and regulatory frameworks, which may be unfit for properly addressing flexible learning. Finally, in the absence of confirmed and commonly agreed European, national and institution-level approaches, issues such as recognition and credit award remain at least uncertain, which has a negative impact on transition and progression paths for students. Overall, for institutions, this poses the question of how to develop first a shared vision across the institution that "meets expectations", and "identifies resources and responsibilities that align with this vision" (Brekke and Zhang, 2024, pp. 7–10).

Among the types of non-degree education that exist, micro-credentials[25] have recently attracted a lot of attention, notably from policy makers in the EU, and in the Bologna Process (see, for example, EC, 2022; EHEA, 2020a). Indeed, as shown in the Trends 2024 data, two thirds of institutions acknowledge that society has a high demand for micro-credentials, and that these are a high priority for their national policy makers; the latter point is particularly emphasised by Croatian, Finnish, Irish, Kazakh and Spanish HEIs. More than 70% of institutions confirm demand from industry and professional sectors. However, over two thirds of institutions also state that it is too early to predict the usefulness and impact of micro-credentials, and that expectations might be too high. Nevertheless, most institutions already offer them and point to actual or intended benefits: they are part of the institutional strategy to diversify and/or enlarge the education offer at 75% of HEIs; they help improve or innovate traditional degree programmes at 79% of HEIs; and 77% of HEIs see micro-credentials as a way to support their inclusion and widening access agenda.

25 In the Trends 2024 questionnaire, "micro-credentials" are defined as a certified small volume of learning, designed to provide the learner with specific knowledge, skills and competences that respond to societal, personal, cultural or labour market needs (definition adapted from the MICROBOL project's Common Framework for Micro-Credentials in the European Higher Education Area).

The 2024 Bologna Process Implementation Report confirms that in more than half of the higher education systems with available data (i.e. 29 systems out of 48), and mainly in Western Europe, HEIs offer learning modules or courses that lead to micro-credentials. However, the report also further analyses national-/system-level issues related to their implementation, and notes that only a few systems have taken steps to ensure transparency, cross-country readability and portability. A closer look at the legal frameworks, which the majority of countries have put in place to enable HEIs to develop modules leading to micro-credentials, suggests that the concept is not understood in the same way across all countries. So far, only 10 systems include micro-credentials in their national qualifications framework (EC/EACEA/Eurydice, 2024, pp. 62–63 and p. 90).

By contrast, the provision of Massive Open Online Courses (MOOCs), which came into existence in 2012 and became a vehicle and enabler for higher education digital learning and teaching innovation, seems to have stagnated, if not shrunk. Only 5% of institutions report that they have had MOOCs, but discontinued them; of the 54% of institutions that indicate that they do not have them, only a third plan to introduce them. Overall, only 27% of institutions provide MOOCs.[26] This represents a decrease on the figure for 2018, when 38% of HEIs indicated they offered open online learning courses, including MOOCs (Gaebel and Zhang, 2018, p. 51). In a 2020 survey, half of respondents confirmed that they offered open forms of online education, 36% of them including MOOCs (Gaebel *et al.*, 2021, pp. 21–22).

It would be fair to assume that with more blended learning included in curricula and a wealth of other non-degree courses, some of which can be taken online, notably micro-credentials, MOOCs have become less relevant as a stand-alone learning offer and field for digital learning experimentation. Attempts to provide credits for MOOCs, which in the 2020 survey was the case at 61% of institutions that offer MOOCs, as well as fee-based models in connection with learner support, have not contributed to making the MOOC a more mainstreamed approach for HEIs, but rather have paved the way for micro-credentials. MOOCs are unlikely to disappear immediately, but the emergence of micro-credentials may bring them back to the initial promise: massive and open, free of charge, with no credentials, and little or no, or only peer-to-peer or automated, learner support. It might give MOOCs a clearer profile with regard to their purposes, for example outreach to specific large learner groups, such as citizens and disadvantaged individuals,

26 Some 9% provide MOOCs only and 18% provide them in addition to other forms of open learning.

dissemination, the popularisation of knowledge as an adjunct to academic research and publications, and also an opportunity to promote and showcase individual academics and their institutions. MOOCs may continue to be offered under multiple track approaches, which have been under exploration for a while: an open learning part can be accessed for free and at the learner's own pace, whereas a fee-based version with learner support and a more defined schedule is offered as a micro-credential. The question is whether this model will be driven by institutions, or, as seems to have been the case so far, by external commercial providers.

5.2. NON-DEGREE EDUCATION OFFERS AND THEIR LEARNERS

The growing demand for and offer of non-degree education, in combination with increased attention at institutional and system level, is likely to be reflected in an increased number of such learners. According to Trends 2024 data, over the past five years, a third of HEIs across the EHEA have observed increasing numbers, and another third stable ones. Only 9% note decreases, in particular in Bosnia and Herzegovina, Ireland and Poland. For the future, half of institutions in Europe expect an increase in enrolment, and another quarter anticipate stable numbers.

However, as mentioned in section 5.1, for HEIs some of the concepts and processes for the development, provision and management of non-degree education may still require more mainstreaming and standardisation. For example, the way in which learners are enrolled varies widely across and within institutions, depending also on the specific programme or course where they are enrolled. Indeed, institutions that offer non-degree programmes or courses (i.e. 70% of the Trends 2024 sample) report various ways of enrolling students, with only 20% registering them centrally with student status, another 30% registering them under another learner status, and 47% registering them with a status that depends on the programme or the course. Rather than serving the particular needs of different learner groups, this diversity is probably caused by different legal, funding and business models, a situation that makes non-degree education rather complex from an institutional perspective. It probably also makes the offer difficult for prospective learners and external partners to read. Under Trends 2018, three quarters of responding institutions highlighted that their lifelong learning provision is separate from that offered to conventional students.

Finally, it should be noted that only 21% of Trends 2024 respondents use recognition of prior learning (RPL) for non-formal and informal learning for admission to higher education (for example, to replace a formal secondary school entry qualification). This figure is low, considering that a larger share of respondents confirm that they have targeted strategies to attract students who would benefit from such RPL.

5.3. COMPLEMENTARITY OF DEGREE AND NON-DEGREE EDUCATION

If HEIs further expand and diversify education offers that complement degree education and develop related recruitment strategies and enrolment processes, there is a question of how massive a change this will be for them, and whether degrees will remain the by-default reference for higher education. Depending on countries, academic traditions and cultures, and graduate profiles, the conclusions may be different, and mixed. About 60% of Trends 2024 respondents reject the idea that micro-credentials could offer an alternative to bachelor's programmes, although 34% would not categorically exclude it. However, for master's programmes, only 42% would not consider this as a possibility, whereas half of respondents agree either fully (12%) or to some extent (38%) that micro-credentials could offer an alternative.

The challenges identified by HEIs themselves as regards flexible learning and non-degree education show frustration over existing frameworks and processes that make degree education difficult to change and adapt at a rapid pace. In future years, the ability of HEIs to define, develop, modify and adapt their contribution to lifelong learning will be crucial for their role in and value for society and the economy. Although widespread, the organisation of non-degree education remains patchy and possibly too dependent on local and regional contexts and needs (societal and labour market needs, mission and role of HEIs in the national landscape of continued professional development, importance of widening participation agenda, etc.).

Micro-credentials, and the wealth of different modalities that they imply, may be one way to get to grips with these varying needs and establish more systematic and visible institutional and system-level approaches. HEIs, together with policy makers, should carefully examine how an education offer consisting of both degree and non-degree provision can provide flexible learning journeys for a diverse student body and a wider range of learners. This could mean the end of the era of a university degree being for a lifetime, as it would establish a culture of learning and skills development continuing upon graduation. Universities can offer lifelong learning in multiple ways, ranging from continuing professional development for graduates to non-degree credit or certificate courses, or part-time provision for adult learners wishing to enter higher education. But if it is assumed that initial degree education will remain the main entry point into higher education, degree curricula will also gain from demonstrating how they relate to a lifelong learning perspective by educating students to become self-reflective on their own learning needs and develop personal responsibility for their own learning throughout their lifetime.

Chapter 6

International exchanges and collaboration between institutions

Main points

- Internationalisation continues to be a very high priority for European HEIs. It is inspired and supported by European policy reforms and instruments, as well as funding support, in the framework of the EEA, the ERA and the EHEA.
- Most institutions have experienced rising or at least stable mobility rates over recent years, although this trend was interrupted by the Covid-19 pandemic. By 2023, about half of institutions had still not returned to their pre-pandemic mobility levels, although the vast majority predict increasing numbers for the future.
- Institutional data on mobility numbers mirrors and illustrates the findings of the Bologna Process Implementation Report: the benchmark of 20% of graduates having a mobility experience is still in the far distance.
- Institutions provide an indication of what needs to be tackled to change this, namely the shortage of affordable accommodation in the mobility destination, and, importantly, the lack of funding. In the latter case, 81% of HEIs mention the insufficient number of scholarships and their low cost coverage as a barrier for students, in a context where costs are generally rising.
- In addition, credit recognition continues to pose problems at 45% of institutions. At half of these, the number of cases where students experience problems is less than 10%. Nevertheless, this should remain concerning for all institutions, as it shows that recognition in the EHEA and Erasmus+ procedures is still not consistently adopted and applied. In addition, institutions face problems in fitting mobility into bachelor's programmes (49%), and even more so into master's programmes (53%), as well as into degrees in specific disciplines (69%). All this illustrates that the Bologna Process reforms have not yet been implemented everywhere, and that Erasmus+ rules are not followed consistently.
- The Covid-19 crisis turned virtual exchanges into a more mainstreamed form of higher education internationalisation, which had previously relied almost exclusively on physical mobility. Under the influence of the Covid-19 crisis, "blended mobility", a combination of virtual exchanges and physical mobility, has become eligible and more frequently implemented under Erasmus+. Between 2020 and 2023, this led to a major increase in the use of virtual exchanges, from 12% to 54% of institutions, with another 20% planning to introduce them. Institutions perceive virtual exchanges to be a useful supplement to physical student mobility and an alternative for students who cannot or do not want to spend longer periods abroad. Formats, workload, and organisational and legal issues are still causing problems.

- Staff mobility is an increasing priority for institutions, with only 14% of HEIs stating that it is not. However, it is approached in a less systematic way than student mobility, as it has its own dynamic, resulting from research and teaching collaboration. But this situation is probably evolving, as 57% of institutions dedicate efforts to improving their approaches to staff mobility. It might continue to change if the strong emphasis on transborder collaboration between institutions continues through institutional agendas and at policy level, for example through the EU's European Strategy for Universities.

- Joint programmes and joint degrees have existed for almost two decades. About half of institutions surveyed under Trends 2024 currently offer joint programmes and joint degrees – but usually only in small numbers, with each benefitting a relatively small number of students. Joint programmes and joint degrees have become a high priority at policy level and for institutions due to the European Universities Initiative. Under this initiative, joint degrees receive particular attention as part of a wider effort to boost and mainstream structured transnational collaboration between institutions. Judging from the Trends 2024 survey responses, the overall picture is quite positive regarding joint programmes and degrees, despite the complexity of the matter and the efforts it entails for institutions. It will be important to map and analyse the feasibility and development potential against the costs, scalability, impact and system-level obstacles. Joint education provision also entails collaborative activities in areas such as virtual exchanges, staff development and strategic innovation in learning and teaching. All these developments might feed into a more general reconceptualisation of internationalisation, in view of the academic and general, social and environmental changes explored in this report.

- Across Europe, almost three quarters of institutions (72%) have structures and resources in place for a systematic approach to their international activities, with 59% of them dedicating a leadership position to this matter. Generally, institutions are comfortable with internationalisation, although one fifth suffer from a lack of staff resources. There are notable differences from one country to another.

This chapter explores internationalisation, which is highly important from an academic perspective, but also for the political visions of a united Europe, and for enhancing relations with partner countries and regions around the world. While the emphasis on physical mobility continues, virtual exchanges are increasingly used and recognised. The creation of the European Universities Initiative resulted in a high level of policy- and institutional-level interest in, and commitment to, inter-institutional transnational collaboration. But internationalisation also requires adequate institutional capacities and resources.

6.1. INTERNATIONALISATION *À L'EUROPÉENNE*

Internationalisation has been a development trend at universities around the globe for at least two decades. The 2024 International Association of Universities Global Internationalisation Survey confirms that its importance is still globally increasing, with the European region coming second highest in terms of the importance it accords it, after the Asia-Pacific region. Interestingly, the survey also confirms that more than for other members of the institution, it is a priority for leadership (Marinoni and Pina Cardona, 2024, pp. 46–47).

When asked about the importance of different priority areas for their institutions, respondents to the Trends 2024 survey allocate the highest score to internationalisation (83%), alongside the third mission (83%), followed by innovation (80%). Even institutions that predominantly serve national or local students are highly interested in internationalisation, for all degree cycles, but in particular for their doctoral programmes.

For HEIs, internationalisation is also in the top three areas of important national reforms over the past five years, along with quality assurance and digitalisation. While 67% of HEIs across Europe see internationalisation policy reforms as highly important (and another 20% of medium importance), in some countries, in particular (though not only) in Eastern Europe,[27] this is the case for 80% or more of HEIs. Some 8% of institutions also feel a high level of pressure in this area coming from relevant authorities and other external stakeholders, while another 10% feel that there is a lack of appropriate recognition for their engagement.

27 In Albania, Azerbaijan, Bosnia and Herzegovina, Bulgaria, Croatia, Finland, Georgia, Hungary, Kazakhstan, Latvia, Moldova, the Netherlands, Türkiye, Ukraine and the UK.

The European dimension plays an important role in the internationalisation of HEIs. Both the EHEA and the EEA encourage and incentivise mobility and collaboration, with instruments such as the ECTS, the Lisbon Recognition Convention and the ESG. Hence, internationalisation of curricula and student and staff mobility appear as policy goals, but also as drivers for coordination and convergence in the reforms, as well as indicators of their success.

EU funding is a key enabler in this, in particular through the EU Erasmus+ and Horizon programmes. In some countries and higher education systems, this is the main, if not the only, dedicated public funding source for internationalisation. In others, it supplements but also influences national funding schemes and strategies, which, for instance, provide additional grants or top-ups for Erasmus+ mobility and support institutions engaging in the European Universities Initiative. While some programmes are limited to the EU member states or specific programme and partner countries, many are open to the wider world. Importantly, the EU, through Erasmus+, also contributes to the funding of the EHEA and its operations, both at policy level (through co-funding of the EHEA secretariat) and for institutional collaboration and exchange (project funding for selected EHEA and EEA goals). Thus, indirectly, even EHEA countries that are not currently eligible under major actions of Erasmus+, such as Switzerland and the UK, benefit from EU funding.

For institutions and their members, beyond access to funding, participation in these EU-funded initiatives helps to develop and sustain networks, and enables peer learning. Erasmus+ contributes to shaping shared forms and formats for internationalisation, and to institutional and sector-level change and innovation. While Erasmus mobility and collaboration on joint teaching projects with colleagues in Europe or overseas have by now become an intrinsic and routine element of the internationalisation culture in European higher education, two more recent Erasmus+ actions seem to open new horizons. Firstly, the European Universities Initiative and the university alliances continue to receive strong attention from higher education staff and leadership, and at national and European policy levels, as they raise the principal question of whether HEIs should be organised differently than they currently are. Secondly, triggered and amplified by the Covid-19 crisis, Erasmus+ support has contributed to making the use of virtual exchanges more mainstreamed, and in parts standardised as a form of internationalisation ("blended mobility").

All this explains why institutions across the EHEA – within or outside of EU or Erasmus+ programme countries – acknowledge the high importance of European funding programmes and policy initiatives (see also Chapter 2). It is not easy to prove the direct impact of national and European policies and measures on developments in the higher education sector. However, it can be taken as an indicator that 70% of institutions in the Trends 2024 survey report that their international collaboration has grown over the past five years, and 64% want to enhance their activities even further in the future. The survey asked for details on student and staff mobility, on virtual exchanges and collaboration and on institutional preparedness for internationalisation; these aspects are further explored in the following sections.

6.2. STUDENT MOBILITY

Mobility is an important element of internationalisation, and probably its most commonly assessed indicator from a statistical point of view. As already mentioned (Chapter 4), European institutions are generally keen on attracting international talent, and 95% of them have a dedicated recruitment strategy in place, either at institutional level (80%) or in some faculties (15%). Institutions themselves assess their mobility exchanges as having been rather successful over the past five years, with two thirds reporting an increase and another fifth indicating stable numbers of international students.

The majority of institutions are also optimistic about the next five years: 77% predict an increase in the enrolment of international students and another 15% expect stable numbers. Global statistics over recent years seem to confirm this upward trend.[28] In addition, with ageing domestic populations in most countries and a decreasing cohort of those aged under 20 in practically all EU countries, the importance of attracting students might go well beyond academic motives.[29]

28 See, for instance, the International Organization for Migration Global Migration Data Portal: https://www.migrationdataportal.org/themes/international-students

29 Eurostat data confirms a decrease in the European population after 2020 due to decreases in 10 countries, whereas the others continued to increase. However, over the period 2002–2022, "the share of young people (aged 0 to 19 years old) decreased in all Member States. At EU level, the decrease was 3 points, from 23% to 20%" (https://ec.europa.eu/eurostat/web/interactive-publications/demography-2023, accessed 27/05/2024).

However, in several countries an above-average proportion of institutions also predict an end to the growth track. For some countries, there might be a straightforward explanation. In Ukraine, where 36% of HEIs predict such a decrease, the continuing war impacts incoming mobility.[30] In Norway, where 40% of HEIs predict a decrease in the number of international students, this may be linked to the introduction of tuition fees for non-EU students in autumn 2023.[31] In the Netherlands, where 20% of HEIs predict a decrease, the sector's self-regulation, partly in response to political pressure and forthcoming regulation, is probably the reason for the trend. In early 2024, Universiteiten van Nederland, the national representative body of Dutch universities, provided a detailed explanation together with guidance for institutions on why and how to diminish undesirable impacts of incoming student mobility, well beyond limiting numbers.[32] These examples seem to concur with and illustrate the fact that 60% of Dutch institutions and 90% of Norwegian HEIs also mention political developments having had a significant impact on their strategies over the past five years.

In other higher education systems where such decreases are not anticipated, in- and outgoing student mobility can still be an issue: too many incoming students can have an impact on study language and cultures, access for domestic students and the related costs for the public purse, while outgoing student mobility can be an issue with regard to outflow of talent, and has financial implications for the institutions. Beyond the academic sector, higher education can be impacted by the wider contexts of labour market needs, unemployment and skills shortage, brain-drain, decreasing demographics, national security concerns and concerns over immigration.

As these challenges impact higher education systems differently, and the national and institutional strategies adopted to face them are quite different and specific, this has not yet translated into joint European actions. European-level discussions and policies in the EHEA and the EEA remain generally positive and supportive regarding mobility. The 2020 Bologna Process Implementation Report confirmed this: in a longitudinal reflection on the occasion of the 20th anniversary of the Bologna Process, the report highlighted "the fact that in a number of member countries the value of mobility and of internationalisation of higher education more broadly have been repeatedly called into question in recent years, if not contested altogether by society at large". However, and by contrast, in the EHEA "student mobility has continued to be seen as a largely positive phenomenon". This makes the point for the EHEA, although in the EU context, mobility has been viewed more sceptically (EC/EACEA/Eurydice, 2020, p. 126). However, this might be less about the EHEA versus the EU, and more about aspects such as the specific policy area with which mobility is associated; the type of mobility that is addressed, and to what purpose; and the situations in individual countries. In the EU context, the EEA and its European Strategy for Universities, which puts a strong and positive emphasis on learning mobility, have been quite positively received. One of the EU's flagships, the European University Initiative, even takes the Bologna Process benchmarks to the extreme, calling for 50% mobility for participating universities. While this has prompted discussion and concern regarding formats and funding, overall, member states have been supportive. In addition, in 2023, the European Commission launched "Europe on the Move", an initiative to boost mobility in all areas of education and training, including school education and vocational education. This was announced as part of a larger Skills and Talent Mobility package, which the EU proposed in view of the demographic situation and lack of qualified labour, and a shrinking EU working-age population (from 265 million in 2022 to 258 million in 2030), with a focus on graduates and people in the labour force. A key pillar is "talent partnerships" with third countries, attraction of skilled labour, and improved and accelerated recognition, "to make the EU more attractive to talent from outside EU".[33]

In May 2024 the Council of the European Union adopted a Recommendation with a new, enhanced benchmark of 23% mobility, which puts the EU slightly out of synch with the EHEA. Indeed, a decade ago, both the EHEA (2009) and the EU (2011) separately – though not entirely disconnectedly – agreed that by 2020, at least 20% of graduates should have had a period of study or traineeship stay abroad (EHEA, 2009).[34] Both have failed their benchmarks by and large. While the has EU proposed a newly defined goal, which also includes "blended mobility", in the Ministerial Communiqués of 2020 and 2024 the EHEA simply restated

30 For the male population, outgoing mobility is restricted due to the martial law.
31 https://aca-secretariat.be/newsletter/norways-bumpy-road-towards-tuition-fees-for-international-students/?titleId=12&articleId=164&edition=2023&current=0
32 https://www.universiteitenvannederland.nl/en/current/news/universities-take-steps-to-manage-influx-of-international-students
33 https://erasmus-plus.ec.europa.eu/news/europe-on-the-move-a-proposal-on-the-future-of-learning-mobility
34 The proposal was made by the EC in the EHEA, obviously because it planned to establish itself a benchmark.

the existing target, leaving open the question of how and by when it would be achieved (EHEA, 2020a and EHEA, 2024).

In the 2024 Bologna Process Implementation Report, the overall weighted average of mobile students for all study cycles stands at 8.8% of graduates[35] in the EHEA (EC/EACEA/Eurydice, 2024, p. 210, based on 2020/2021 data).

Trends 2024 data, provided by institutions themselves, suggests that only 13% of institutions reach the benchmark for the bachelor's level and 14% for the master's level. But at over half of institutions, only 10% or fewer of students are mobile at bachelor's and master's levels. A direct comparison of institutional- and system-level data is not feasible. While 92% of institutions have data on mobility at bachelor's and 90% at master's level, this would mainly or only comprise short-term credit mobility, within degrees.[36] Therefore, if intra-EHEA and intra-EEA degree mobility was to be included, the actual numbers might be slightly higher. Nevertheless, this does not change the overall finding of the Bologna Process Implementation Report, and the purpose here is simply to show that there are differences between individual institutions.

In line with the trend shown in system-level data, the numbers are higher for the doctoral level: 22% of institutions indicate that more than 20% of their doctoral candidates have mobility experience, and at 13% of them this applies to half of their doctoral candidates. An additional 28% of institutions cannot provide information for the doctoral level.

Table 8: Mobility rates at institutions

Q43. At your institution, what is the approximate percentage of students with at least one physical mobility experience upon graduation? N=478.

Percentage of students with at least one physical mobility experience	≤5%	6–10%	11–20%	21–50%	More than 50%	No information /NA
Bachelor's	34%	25%	20%	9%	4%	8%
Master's	37%	20%	18%	10%	4%	10%
PhD	30%	10%	9%	9%	13%	28%

While the benchmarks might remain out of reach, 75% of institutions nevertheless report that students' physical mobility has been increasing gradually over the years, and another 21% report significant increases, at least until the Covid-19 pandemic reduced exchanges, or put them on hold. In 2023, when the Trends 2024 survey was conducted, only 42% report that their mobility rates are back to the pre-2020 level, and another 40% report that this is not the case.

Other challenges for mobility lie ahead. For 81% of surveyed institutions (27% fully, 54% to some extent), one of the key obstacles is that many students cannot afford mobility due a lack of scholarships, or their insufficient cost coverage. In particular, the lack of affordable housing in many mobility destinations is a barrier.

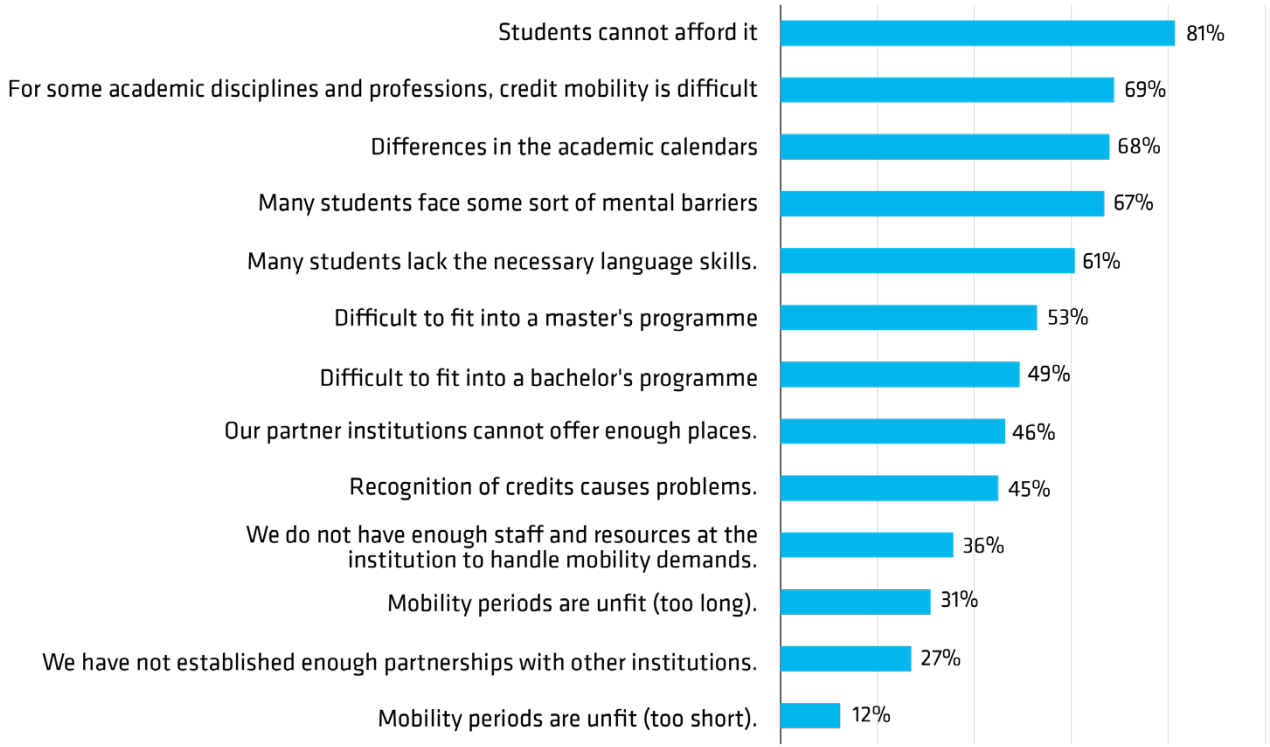
In addition, institutions report other barriers that that students might face, and barriers in their collaboration with partners (Figure 31).

35 This combines degree and credit mobility, and is the weighted average for inward and outward mobility.

36 Institutions cannot know about degree mobility in the case of students leaving the institution to study a degree elsewhere. Where students arrive with a degree from another institution, they might be counted as incoming mobility, or not as mobile students at all.

Figure 31: Mobility challenges

Q45. (partial). What do you see as challenges for your outgoing students (credit mobility)? Please select one option per line. N =166.

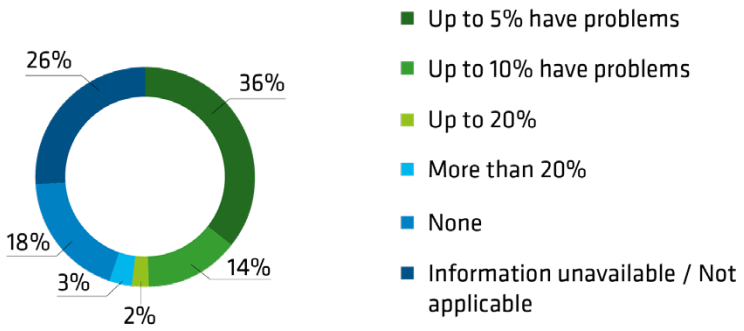


Another well-known issue that causes problems is credit recognition. Institutions are somewhat divided on how serious this problem is. While 45% of institutions perceive recognition of ECTS credits as a challenge for mobile students (8% fully, 37% to some extent), 53% think it is not.

It is important to note that only a small share of institutions (6%) seem to encounter major difficulties with the recognition of credits for a large proportion of students (more than 10%), whereas at half of institutions, the problems concern 10% or fewer students. It is problematic that more than a quarter of the institutions (26%) have no information in this regard, leaving it unclear whether the institution does not monitor this issue, or whether the individual respondent has no access to the data.

Figure 32: Problems with recognition for students returning from credit mobility

Q45.2. How many students returning to your institution from abroad (credit mobility) encounter problems with credit recognition? Please choose one option. N=207.



Many of those institutions with relatively few recognition problems mention that this is an issue of major concern to them. Reticence on the part of their own teaching staff to approve learning outcomes from study periods abroad is one of the most frequently mentioned issues. Instead of assessing the comparability of learning outcomes, there is a too-narrow focus on similarities in course content. Even very small changes in, or deviations from, the learning agreement often lead to credits not being recognised. Besides credit recognition, the transfer of grades, or grade equivalency, is reported to be especially – or even more – challenging. Some institutions also mention problems for students in having the learning agreement signed on return, which, according to Erasmus+ rules, should actually happen before departure. Other institutions note that credit recognition works well within Erasmus+, but is still a problem in other mobility schemes.

In addition, many institutions report difficulties in fitting credit mobility periods into:

- a master's programme (53% of institutions, including 41% to some extent);
- a bachelor's programme (49% of institutions, including 40% to some extent);
- certain disciplines, e.g. degrees leading to regulated professions (69% of institutions, including 46% to some extent).

These could be seen as structural or organisational problems. However, they might mean in essence that recognition principles are not applied, as the study period aboard cannot – or only with difficulties – be recognised as an equivalent for the study period that has been "missed" at the home institution. As a result, students in certain study programmes are either excluded from credit mobility or at least advised not to do it.

What can be concluded for further action? As the Bologna Process Implementation Report states, the EHEA mobility benchmark has contributed to enhancing mobility (EC/EACEA/Eurydice, 2024). But it may need some reconsideration (see Davies, 2023). It might make sense to have a stronger focus on composite parts of the benchmark, as degree and credit mobility are very different, and need specific attention at the appropriate levels. With regard to credit mobility, HEIs can take active measures.

Thus, the following must occur if longstanding and upcoming new mobility benchmarks are to be reached:

- Mobility must become more inclusive, to ensure that students' social and material situations are not an obstacle to participation. Apart from funding, this requires policies, strategies and – importantly – prioritisation at the level of institutions, but also, and in particular, at system level. The problems are known, and there are good institutional and national initiatives on how to change the situation.[37]

- With larger numbers of students becoming mobile, institutions must have sound organisational structures and sufficient capacity to facilitate the actual exchanges, but also to provide student advice and support. This requires investment in international offices and related structures. It would also require functional Erasmus+ tools and processes, which are currently not in place.[38]

- Recognition needs to be given a higher priority, both at institutional and at national system level. While the principles of the Lisbon Recognition Convention and the Erasmus+ procedures are well known, they are not yet consistently applied; this is to the detriment of students, but probably also creates frustration among staff who have been working on this over many years and have repeatedly encountered the same problems.

- A broader reflection on changed and changing models for mobility needs to take place, taking into account the social situation of students, the opportunities for virtual exchange and internationalisation at home, and a reconceptualisation of internationalisation in general, which has had a very strong, almost exclusive focus on mobility.

37 A 2020 study explored obstacles using the example of the EU neighbour countries (Bunescu et al., 2020). Over several rounds and years, European consortia including or being led by the Flemish Ministry of Education and training have also established information and advice, guidance and tools: https://inclusivemobility.eu/

38 See, for instance, the EUA policy recommendations for the interim evaluation of the Erasmus+ programme, based on input from about 500 European HEIs (EUA, 2023a).

6.3. VIRTUAL EXCHANGES

Before 2020, despite intense discussions on digitally enhanced learning, virtual learning played only a minor role – if any at all – in the internationalisation context. At most HEIs, a few colleagues had been doing pioneering work, notably with Collaborative Online International Learning (COIL) and virtual exchanges. Technically, these were feasible, and studies have confirmed their usefulness for learning. However, along with the broader "internationalisation at home" agenda, they remained a niche activity at most universities and attracted little or no attention at political levels.

This changed during the Covid-19 pandemic, when virtual learning suddenly became the only means of continuing international exchanges. After the pandemic, because a large segment of the sector had had practical experience, the use of virtual learning not as a replacement for but as a complement to international mobility seems to have gained acceptance.

This was certainly acknowledged at the 2020 Rome Conference of EHEA Ministers, which due to the pandemic was held online for most participants. The Rome Communiqué stated that the ministers "further commit to enabling all learners to acquire international and intercultural competences through internationalisation of the curricula or participation in innovative international environments in their home institutions, and to experience some form of mobility, whether in physical, digitally enhanced (virtual) or blended formats" (EHEA, 2020a). However, there has been no immediate consequence to or follow-up of this part of the communiqué.

Of greater importance were the changes in the Erasmus+ programme. The European University Initiative's requirement to have 50% of the institution's student population mobile had already inspired the search for virtual and blended alternatives. But formally, under Erasmus+, virtual exchanges were not eligible.[39] The pre-pandemic 2020 Erasmus+ programme guide[40] lists "development and implementation of flexible mobility formats (short, virtual and blended)" as one specific priority for "Building inclusive higher education systems" (p. 104). But

39 Erasmus+ supported virtual exchanges only under the Youth programme, for informal learning in an international set-up.

40 https://erasmus-plus.ec.europa.eu/document/erasmus-programme-guide-2020-version-3

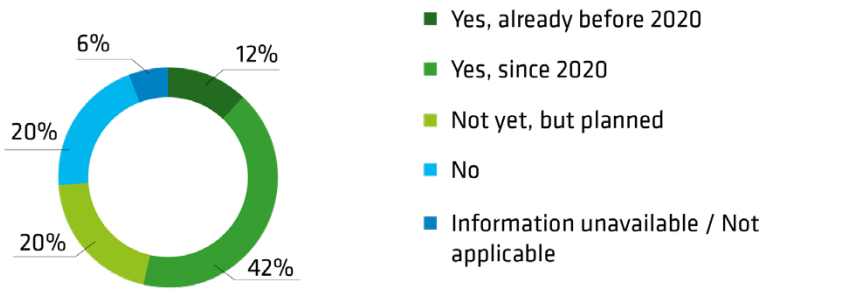
the guide contains only a few mentions of "virtual", and virtual exchanges are not mentioned as a programme action. In the context of the Erasmus Mundus Joint Master Degree (EMJMD), it states: "Mobility periods cannot be replaced by virtual mobility (distance learning), which implies physical presence of the students is required during the entire Master programme. In addition, they cannot take place in institutions outside the EMJMD consortium (i.e. partners and/or associated partners)." This was changed a year later: the 2021 programme guide[41] underlines on the first pages the importance of widening participation, including through "the combined use of physical mobility and virtual learning and virtual cooperation" (p. 9) and states that "institutions should promote blended mobility, the combination of a physical mobility with a virtual component, within their institution to offer more flexible mobility formats and further enhance the learning outcomes and impact of physical mobility" (p. 44). It defines blended mobility as "a combination of physical mobility with a virtual component facilitating a collaborative online learning exchange and teamwork. For example, the virtual component can bring learners together online from different countries and study fields to follow online courses or work collectively and simultaneously on assignments that are recognised as part of their studies" (p. 45).

This explains why, in the Trends 2024 survey, of the 54% of the institutions that offer virtual exchange, only 12% already had them before 2020. The numbers are likely to rise further, as another 20% plan to introduce them. The use of virtual exchanges is less common at specialised universities and music or art schools than at comprehensive, multidisciplinary universities, technical universities and universities of applied sciences.

41 https://erasmus-plus.ec.europa.eu/document/erasmus-programme-guide-2021-version-3

Figure 33: Virtual mobility

Q46. Does your institution participate in virtual student exchanges/virtual mobility? Please select one option. N=481.



Institutions confirm the importance of funding, mainly – though not only – through Erasmus+. The majority (71%) have virtual mobility co-funded as "blended mobility". Forty-one per cent of HEIs also offer virtual exchanges in the context of their European university alliance, and a third of institutions as part of a joint programme. Interestingly, a fifth of institutions also receive funding through national and other funding sources, and more than a third of HEIs refer to initiatives set up by teachers themselves (36%).

The vast majority (92%) of institutions agree that virtual exchanges offer opportunities for students who cannot, or do not want to, pursue physical mobility, and even more (94%) that it is a good complement and addition to physical mobility. Anecdotally, institutions point to what is often presented as increasing challenges preventing students from attending the traditional semester- or year-long Erasmus+ study stay abroad: financial issues, concerns over giving up accommodation at the home place and finding new accommodation at the study destination, employment and caring duties, etc. It is not clear whether these obstacles have generally increased over the years, or whether institutions are simply more aware of them thanks to increased efforts and pressure to make mobility more inclusive.

Virtual mobility and exchanges are still relatively new for many institutions. Almost all institutions confirm that they need to gain more experience and that the formats still need to be enhanced (92%). Almost two thirds find them easy to organise. EUA's survey for the Erasmus+ interim evaluation noted increased interest from institutions in blended mobility, but resulting recommendations

point to the fact that this requires significant staff resources to arrange, which might not be reflected in the grants provided (EUA, 2023a). The Trends 2024 data also shows mixed feedback on the attitude of students and teachers towards these formats: about 60% of institutions confirm that students and staff like them (fully or to some extent), but 20% of HEIs disagree and another 20% have no information. In addition, significant legal and organisational challenges have yet to be solved at about two thirds of institutions, and at as many as 78% of Czech HEIs. This explains the fact that 61% of institutions find it too early to draw conclusions.

Mobility generally is likely to gain even more attention with the newly adopted Council Recommendation "Europe on the Move" and its benchmark of 23%, which includes blended mobilities (Council of the European Union, 2024)[42] but, significantly, does not include fully virtual mobility formats.

6.4. STAFF MOBILITY

In the context of growing attention to internationalisation and inter-institutional partnership and collaboration, staff mobility and exchanges can be expected to increase in importance.

Staff mobility is a priority for most of the institutions, with only 14% stating that it is not, and a mere 2% that they have no plans to change it. Some 52% of institutions have dedicated policies and support measures in place, and 20% have defined benchmarks. However, compared with other internationalisation activities, such as international student recruitment, staff mobility still appears to be a less prominent priority and not so strongly rooted in institutional practices. Academic and partially also administrative staff mobilities tend to have their own dynamics, resulting from externally funded joint research and teaching opportunities: this is probably also a reason that there is less focus on organised and scheduled approaches than there is for student mobility. The question is whether this is gradually changing, given the importance given to transnational inter-institutional partnerships, such as in the European university alliances. Staff mobility may also be increasingly being seen as an opportunity for staff development. This would increase the strategic institutional importance of staff mobility as compared with the initiatives of individual academics. It would also explain why 57% of institutions are exploring ways to enhance their staff mobility approaches.

6.5. JOINT EDUCATION OFFERS

Joint programmes and joint degrees are probably one of the most distinctive features of internationalisation in European higher education. As an action of the European Commission's funding programme, in particular under Erasmus Mundus, collaboration in learning and teaching among European HEIs and with their international partners has been enabled. As joint programmes and degrees require joint provision and mobility, and implicitly also recognition, they have become a litmus test for the reforms brought forward under the Bologna Process over the past two decades. This particular aspect received more or renewed attention with the emergence of the European Universities Initiative, which was piloted in 2018 and is now included under the Erasmus+ programme, and of the European Strategy for Universities (EC, 2022). It provides funding and principles for enhanced transborder inter-university collaboration, enabling increased mobility and joint degrees.

More than half of the institutions surveyed under Trends 2024 currently offer joint programmes (53%) and joint degrees (56%).[43] This appears to be quite successful, as only a very small number have had such programmes in the past and discontinued them (3% did so for joint programmes, 4% for joint degrees). This also confirms their feasibility, at least at those institutions and, importantly, in their systems.

42 " (...) 'Learning mobility' within the meaning of this Recommendation covers all types of long-term and short-term learning mobility, including individual and group mobility, blended mobility (including its virtual components), credit mobility and degree mobility" (Council of the European Union, 2024, p. 10).

43 The Trends 2024 survey employed the definitions provided by the European Approach for Quality Assurance of Joint Programmes (source: https://www.eqar.eu/). Thus, "joint programmes" are defined as "an integrated curriculum coordinated and offered jointly by different HEIs, and leading to double/multiple degrees or a joint degree". "Joint degrees" are defined as "a single document awarded by higher education institutions offering the joint programme and nationally acknowledged as the recognised award of the joint programme". The response illustrates that despite the definition provided in the survey, the two approaches are not always clearly differentiated, as the number of institutions indicating that they have a joint degree should not be higher than that for institutions offering joint programmes. The same was observed at an Erasmus Mundus conference, where despite the best efforts of the organisers, some participants tended to mix the terms up, or use them interchangeably.

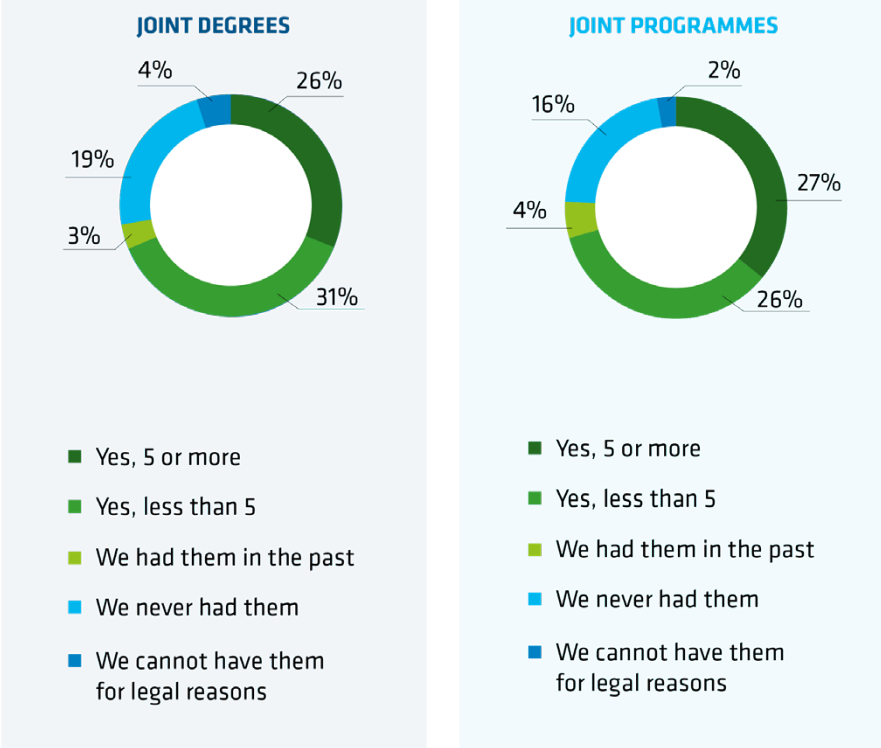
Only about a fifth of institutions have never had joint programmes (18%) or joint degrees (23%). Interestingly, a small percentage (2% joint programmes, 4% joint degrees) indicate that they cannot have them due to legal restrictions.

This seems to contradict the common reference to overwhelming legal and organisational obstacles, in particular for joint degrees. However, the reality is likely to be that joint programmes, and even joint degrees, are feasible in most institutions, but that they might be cumbersome, as there is no straightforward track due to system- but also institutional-level rules and structures.

While joint delivery may have many benefits for students and for the institutions and their staff, it must be kept in mind that this is – up to now – a relatively small part of the degree education offer in Europe. Only about half of the institutions that offer such delivery have five or more joint programmes or joint degrees. In addition, student numbers in these programmes and degrees tend to be quite low. Joint delivery appears to be strategic, but limited in scale.

Figure 34: Joint offer

Q47. Does your institution offer joint degrees and/or joint programmes? Please select one option per row (one for joint degrees, one for joint programmes). N=397.



The question is whether this is going to change, given the strong emphasis on and interest in the European university alliances and the renewed attention on the Erasmus Mundus programme. Another question is how to map, beyond numbers of courses and graduates, the wider impact of these joint provision initiatives. It is assumed that they inspire the uptake of virtual exchanges and staff exchanges. Finally, there is the question of how scalable these formats are, in view of the capacity and funding needed for growing inter-institutional collaboration. Again, this could provide a useful input to the broader discussion on the concept of internationalisation, which would have to take into account educational, geopolitical, environmental, technological and other academic and societal aspects.

6.6. INSTITUTIONAL PREPAREDNESS FOR INTERNATIONALISATION

Against the background described in the previous sections, it seems that what is at stake is a reconceptualisation of internationalisation in the context of new formats and means for internationalisation, changing demands and conditions, notably those influenced by targeted European and system-level policies, and the impact of broader trends (such as geopolitics, greening, technological developments, and economic and social changes).

How well equipped are European HEIs for internationalisation, in terms of policies, structures and resources?

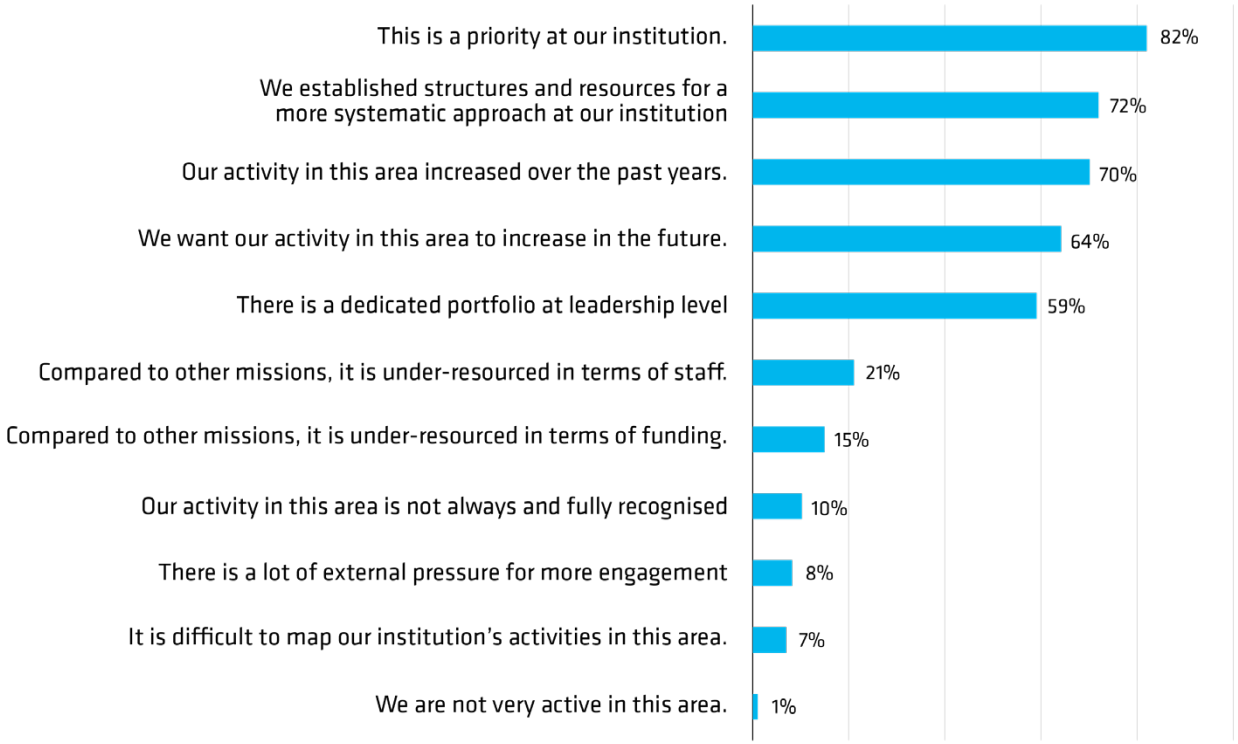
Almost three quarters of institutions (72%) indicate that they have structures and resources in place for a systematic approach in their activities in this area, with some notable country differences. All or almost all institutions in Belgium (FR), Finland, Kosovo, Norway, Portugal and Switzerland have such structures and resources in place, while this is the case in fewer than half of institutions in Azerbaijan, Bosnia and Herzegovina, Kazakhstan and Ukraine.

Europe-wide, more than half of institutions also have a dedicated leadership portfolio for international collaboration and exchange, such as a vice- or pro-rector. This is the case at almost all institutions in Belgium (FR), Ireland, Italy, the Netherlands, Romania, Türkiye and the UK. By contrast, fewer than half of institutions have such a portfolio in Austria, Azerbaijan, Bosnia and Herzegovina, Bulgaria, Georgia, Latvia and Slovenia.

Generally, institutions seem to be comfortable with their internationalisation agendas and portfolios; only 7% of institutions report difficulties in mapping their international activities. Other common challenges include understaffing, which is an issue in about a fifth of institutions, in particular in Belgium, Ireland, Italy and Sweden: more than 40% of institutions in Belgium (FR), Italy and Sweden underline this as an issue. Institutions in Czechia (33%) in particular highlight underfunding, which is an issue for 15% of institutions across Europe.

Figure 35: International exchange and collaboration

Q42. How would you describe the situation of international exchange and collaboration at your institution? Please select all applicable options. N=401.



Conclusions and ways forward

Much has already been said and written on how disruptive or transformative the past five years have been, and not only for the higher education sector. Overall, the broad range of data collected for Trends 2024 tends to demonstrate that HEIs in the EHEA are evolving rather than radically transforming, with relatively common horizons and resulting in the adoption of concrete policies and measures. In this regard, three key areas should be underlined, as they deserve attention from policy makers and institutions in the immediate future, and further take-up through actions:

- More importance granted to more missions and areas. With the third mission and the diverse portfolios that it holds being given increasing attention, and at the same time learning and teaching gaining in organisation and flexibility, HEIs are under more pressure to perform and demonstrate what they do in all missions and areas of activities. Hence, it is important to avoid mission overload and the "do more with less" trap, and to address early issues before they turn into hurdles. Such issues include underfunding, the lack of adequate frameworks and processes to structure and mainstream activities and their organisation, as well as the lack of recognition, at times, of all activities carried out by HEIs.

- An urgent and proper reflection on the education offer. With changes in the numbers and composition of the student body in many countries, and the rise of non-degree education, HEIs need to explore and redefine further their education provision for the future. Future directions certainly encompass consideration of what flexible learning would mean and entail for each institution; the role of HEIs in lifelong learning and the continuum that they want to design between degree and non-degree education; and the overall student experience that institutions want to offer, with attention on wellbeing, study modes and the diversity of student backgrounds and needs.

- The state and purpose(s) of internationalisation in the higher education sector. This area is identified as a top priority, yet there is still much to do to improve daily operations and, importantly, the overall strategic approach. Mobilities (physical and blended; for students and staff) are subject to European benchmarks, yet require further strategic thinking at institutional, national and European level on resources to engage to meet the ambitions. Joint education provision is positively perceived, yet the role it plays in the overall landscape is still limited in scale. In a context where most institutions count on increasing international student numbers, it is clear that HEIs now need to enhance and increase their strategic approaches to internationalisation and to define for themselves the purposes of it and the means to achieve them. All these issues are also part and parcel of the need to rethink internationalisation, with due consideration to the changed and changing frameworks and conditions, be they environmental aspects, technological developments, or geopolitical or demographic changes.

In the midst of developments coming from all sides of society and the economy, the role of policy makers, in particular at the EU and EHEA levels, has undoubtedly played a role in agenda- and priority-setting for HEIs, and will continue to do so. To cite only obvious examples, the European university alliances are influencing the ways in which HEIs operate in transnational collaborations; and the Bologna Process is providing grounds for increased awareness and action in the fields of equity, diversity and inclusion, and fundamental values. Given the overall importance of such agenda-setting, it is even more crucial that higher education institutions are properly consulted and can play a proactive role in the development of the policy agendas. Trends 2024 data confirms that this is happening, though maybe not everywhere in the same way, and with room for further improvement.

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Annex I

Trends 2024 survey questionnaire

THE FULL SURVEY QUESTIONNAIRE IS AVAILABLE VIA THIS QR CODE

Annex II

List of institutions contributing to Trends 2024

The following higher education institutions participated in the Trends 2024 survey and agreed to be listed by name. An additional 58 institutions participated in the survey but preferred not to be listed. For a map with the number of all responding institutions per country, see Figure 1.

Q52. Would you like your institution to be mentioned as a contributor in the annex of the Trends report?

Albania

Agricultural University of Tirana
Aleksander Moisiu University, Durres
Bedër University College
Canadian Institute of Technology
Fan S. Noli University
POLIS University
Polytechnic University of Tirana
University College 'LOGOS'
University Metropolitan Tirana
University of Shkodra Luigj Gurakuqi
University of Tirana

Andorra

University of Andorra

Austria

mdw – University of Music and Performing Arts Vienna
Paracelsus Medical University Salzburg
Paris Lodron University Salzburg
Salzburg University of Applied Sciences
St Pölten University of Applied Sciences
University College of Teacher Education Styria
University of Applied Sciences FH Campus Wien
University of Innsbruck
University of Music and Performing Arts Graz
Upper Austria University of Applied Sciences
Vienna University of Economics and Business

Azerbaijan

Academy of the State Customs Committee of the Republic of Azerbaijan
ADA University
Azerbaijan Architecture and Construction University
Azerbaijan State Academy of Physical Education and Sport
Azerbaijan State Oil and Industry University
Azerbaijan State Pedagogical University
Azerbaijan State University of Culture and Arts
Azerbaijan State University of Economics
Azerbaijan Tourism and Management University
Azerbaijan University of Languages
Baku Engineering University
Baku Music Academy named after Uzeyir Hajibeyli

Baku Slavic University
Baku State University
Khazar University
Mingachevir State University
Nakhchivan Teachers Institute
Nakhchivan University
SOCAR Baku Higher Oil School
Western Caspian University

Belgium

Ghent University
KU Leuven
Université Libre de Bruxelles (ULB)
University College Haute Ecole en Hainaut
University of Antwerp
University of Louvain
University of Mons
University of Namur

Bosnia and Herzegovina

Bijeljina University
College of Finance and Accounting FINra
College of Health Sciences Prijedor
International Burch University
International University Travnik in Travnik
University of Mostar
University of Sarajevo
University of Tuzla

Bulgaria

Academy of Music, Dance and Fine Arts 'Prof Asen Diamandiev', Plovdiv
D. A. Tsenov Academy of Economics
Lyuben Karavelov Higher School of Structural Engineering and Architecture
National Sports Academy 'Vassil Levski'
Technical University of Sofia
University of Agribusiness and Rural Development
University of Economics, Varna
University of Library Studies and Information Technologies
University of Telecommunications and Post
University of Veliko Turnovo

Croatia

University of Applied Health Sciences
University of Applied Sciences Ivanić-Grad
University of Rijeka
University of Zadar

Cyprus

European University Cyprus
University of Cyprus
University of Nicosia

Czechia

Academy of Art, Architecture and Design
Academy of Performing Arts in Prague
Brno University of Technology
Charles University
College of Logistics
Czech University of Life Sciences Prague
Jan Evangelista Purkyne University in Ústí nad Labem

Masaryk University
Mendel University in Brno
Moravian Business College Olomouc
Palacký University Olomouc
Prague University of Economics and Business
Škoda Auto University
Technical University of Liberec
Unicorn University
University College Prague
University of Chemistry and Technology, Prague (UCT)
University of Defence
University of Hradec Králové
University of Pardubice
University of South Bohemia in České Budějovice
University of Veterinary Sciences Brno
VSB – Technical University of Ostrava

Denmark

Copenhagen Business School

Estonia

Estonian Academy of Arts
Estonian Academy of Music and Theatre
Tallinn University
University of Tartu

Finland

Tampere University
University of Eastern Finland
University of Helsinki
University of Jyväskylä
University of Turku

France

Artois University
Avignon University
CY Cergy Paris University
INSA Rouen Normandie
Limoges University
Lumière University Lyon 2
Paris-Panthéon-Assas University
Paris-Saclay University
Paul Sabatier University Toulouse
Sorbonne Paris Nord University
Sorbonne University
Université Savoie Mont Blanc
University Claude Bernard Lyon 1
University of Bordeaux
University of Burgundy
University of La Réunion
University of Lorraine
University of Orléans
University of Poitiers
University of Versailles Saint-Quentin-en-Yvelines
University Strasbourg
University Toulouse I Capitole

Georgia

David Tvildiani Medical University
Ivane Javakhishvili Tbilisi State University
Kutaisi University
Petre Shotadze Tbilisi Medical Academy

Tbilisi State Medical University
University of Georgia

Germany

European University Viadrina Frankfurt (Oder)
Free University Berlin
Karlsruhe Institute of Technology
Karlsruhe University of Applied Sciences
Munich University of Applied Sciences (MUAS)
Münster University of Applied Sciences
Ostwestfalen-Lippe Technical University of Applied Sciences and Arts
Reutlingen University
Rhine-Waal University of Applied Sciences
Ruhr University Bochum
Technical University Ilmenau
Trier University
Trier University of Applied Sciences
University auf Music Trossingen
University of Applied Sciences Darmstadt
University of Applied Sciences Merseburg
University of Bremen
University of Cologne
University of Greifswald
University of Hagen
University of Music Freiburg
University of Osnabrück
University of Stuttgart
University of Wuppertal
Weißensee School of Art berlin

Greece

Aristotle University of Thessaloniki
University of the Peloponnese

Holy See

Pontifical Gregorian University

Hungary

Andrássy University Budapest
Budapest University of Technology and Economics
Corvinus University of Budapest
Eötvös József College
Eötvös Loránd University
Kodolányi János University
Moholy-Nagy University of Art and Design, Budapest
Obuda University
Széchenyi István University
University of Dunaújváros
University of Public Service

Iceland

University of Iceland

Ireland

Dublin City University (DCU)
Royal College of Surgeons in Ireland
Technological University Dublin
University College Cork
University College Dublin

University of Galway
University of Limerick

Italy

Ca' Foscari University of Venice
Conservatory Giuseppe Verdi, Milan
Conservatory of Music of Sassari
Corelli conservatoire
Foro Italico University of Rome
Free University of Bozen
IMT School for Advanced Studies Lucca
International University of Languages and Communication
LUISS Guido Carli University
New Academy of Fine Arts
Politecnico di Milano
Sapienza University of Rome
Suor Orsola Benincasa University
Tuscia University
University Carlo Cattaneo
University of Bergamo
University of Bologna
University of Brescia
University of Cagliari
University of Cassino
University of Eastern Piedmont
University of Ferrara
University of Florence
University of Genoa
University of Macerata
University of Messina
University of Milan
University of Milano-Bicocca
University of Modena and Reggio Emilia
University of Naples 'L'Orientale'
University of Naples 'Parthenope'
University of Padua
University of Parma
University of Pisa
University of Rome Tor Vergata
University of Salento
University of Siena
University of Teramo
University of Trento
University of Trieste
University of Turin
University of Udine
University of Urbino
Vita-Salute San Raffaele University

Kazakhstan

Korkyt ata Kyzylorda University
Nazarbayev University
Pavlodar Pedagogical University named after Alkey Margulan
South Kazakhstan State Pedagogical University

Latvia

Jazeps Vitols Latvian Academy of Music
Liepaja University
Riga Stradins University
Transport and Telecommunication Institute
University of Latvia
Ventspils University of Applied Sciences

Liechtenstein

University of Liechtenstein

Lithuania

Kaunas University of Technology (KTU)
Kauno Kolegija Higher Education Institution
Klaipeda University
Lithuanian University of Health Sciences
Mykolas Romeris University
Vilniaus Kolegija Higher Education institution
Vilnius Gediminas Technical University

Luxembourg

University of Luxembourg

Malta

Institute of Tourism studies (ITS)

Moldova

Academy of Economic Studies of Moldova
Ion Creanga State Pedagogical University of Chisinau
Nicolae Testemitanu State University of Medicine and Pharmacy
Technical University of Moldova
Trade Co-operative University of Moldova

Netherlands

Delft University of Technology
Eindhoven University of Technology
Erasmus University Rotterdam
Nyenrode Business University
Tilburg University
University of Arts The Hague – Royal Conservatoire
Utrecht University
Utrecht University of the Arts

North Macedonia

Goce Delchev University of Stip
South East European University
University St Kliment Ohridski Bitola

Norway

BI Norwegian Business School
Kristiania University College
MF Norwegian School of Theology, Religion and Society
Norwegian Academy of Music
Oslo Metropolitan University
University of Agder
University of Oslo
University of South-Eastern Norway (USN)
University of Stavanger
VID Specialized University
Western Norway University of Applied Sciences

Poland

Collegium Civitas
Jagiellonian University
Jan Dlugosz University in Czestochowa
Jan Kochanowski University of Kielce
John Paul II Catholic University of Lublin

Jozef Pilsudski University of Physical Education
Karol Lipinski Academy of Music in Wroclaw
Krzysztof Penderecki Academy of Music in Krakow
Lodz Film School
Main School of Fire Service
Maria Grzegorzewska University
Marie Curie-Sklodowska University
Medical University of Warsaw
Military University of Technology
Stefan Batory Academy of Applied Sciences
SWPS University of Social Sciences and Humanities
University of Agriculture in Krakow
University of Gdansk
University of Warmia and Mazury
University of Warsaw
Warsaw University of Technology
Wroclaw Medical University
Wroclaw University of Economics and Business
Wroclaw University of Environmental and Life Sciences – UPWr

Portugal

Autonomous University of Lisbon
Bragança Polytechnic University
ISCTE – University Institute of Lisbon
Military University Institute
NOVA University of Lisbon
Nursing School of Coimbra
Polytechnic University of Leiria
Portucalense Infante D. Henrique University
University of Aveiro
University of Beira Interior (UBI)
University of Coimbra
University of Lisbon
University of Minho
University of Porto
University of the Algarve
University of Trás-os-Montes and Alto Douro

Romania

Alexandru Ioan Cuza University
Aurel Vlaicu University of Arad
Babes-Bolyai University
Carol Davila University of Medicine and Pharmacy Bucharest
Danubius University Galati
'Dunarea de Jos' University of Galati
Gheorghe Asachi Technical University of Iasi
Grigore T. Popa University of Medicine and Pharmacy Iasi
Henri Coandă Air Force Academy
Ion Mincu University of Architecture and Urban Planning – Bucharest
'Mircea cel Batran' Naval Academy
'Nicolae Bălcescu' Land Forces Academy
Petroleum-Gas University of Ploiesti
Politehnica University of Timisoara
Protestant Theological Institute of Cluj-Napoca
Romanian-American University
Technical University of Cluj-Napoca
The Transylvania University of Brasov
University of Agronomic Sciences and Veterinary Medicine from Bucharest
University of Arts Targu Mures
University of Bucharest
University of Craiova
University of Life Sciences 'King Mihai I' from Timisoara

University of Medicine, Sciences and Technology from Targu Mures
University of Oradea
University of Pitesti
West University of Timisoara

San Marino

University of the Republic of San Marino

Serbia

University of Belgrade

Slovakia

Catholic University in Ružomberok
Matej Bel University in Banska Bystrica
Technical University in Zvolen
University of Economics in Bratislava

Slovenia

College of Polymer Technology
DOBA Business School
University of Ljubljana
University of Maribor
University of Nova Gorica
University of Primorska

Spain

Camilo José Cela University
Comillas Pontifical University
Jaume I University
Open University of Catalonia
Polytechnical University of Valencia
Ramon Llull University
Rey Juan Carlos University
Rovira i Virgili University
University of Alicante
University of Almeria
University of Balearic Islands
University of Burgos
University of Cordoba
University of Deusto
University of Girona
University of Oviedo
University of Vigo

Sweden

Dalarna University
Karolinska Institute
Kungl. Musikhögskolan i Stockholm
Linköping university
Linnaeus University
Lund University
Mälardalen University
Malmö University
Mid Sweden University
Stockholm University
Umea university
University of Skövde
University West

Switzerland

Bern University of Applied Sciences
ETH Zurich
UniDistance Suisse
University of Applied Sciences and Arts Western Switzerland
University of Bern
University of Geneva
University of Lausanne
University of St Gallen
University of Zurich
Zurich University of Applied Sciences (ZHAW)
Zurich University of the Arts

Türkiye

Bursa Technical University
Inönü University
Istanbul Aydin University
Istanbul Bilgi University
Middle East Technical University
Ozyegin University
Yeditepe University

Ukraine

Borys Grinchenko Kyiv University
Kyiv National Economic University
National University 'Zaporizhzhia Polytechnic'
National University of Life and Environmental Sciences of Ukraine
Poltava State Medical University
Simon Kuznets Kharkiv National University of Economics
State Institution of Higher Education 'University of Educational Management'
State University 'Uzhhorod National University'
Sumy State University
Ternopil Ivan Puluj National Technical University
V. N. Karazin Kharkiv National University
Vasyl' Stus Donetsk National University (DonNU)
Yaroslav Mudryi National Law University
Zhytomyr Polytechnic State University

United Kingdom

Coventry University
Leeds Beckett University
Queen Mary University of London
Royal Holloway and Bedford College, University of London
Swansea University
University of Glasgow
University of Liverpool
University of St Andrews

Others

AAB College
Cyprus Health and Social Sciences University
International Business College Mitrovica
Riinvest College
UBT Higher Education Institution
University 'Isa Boletini' Mitrovica
University 'Ukshin Hoti' Prizren

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