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Implementation Report*



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CHAPTER 5:

INTERNATIONALISATION

Chapter outline

This chapter addresses the key issues of internationalisation and mobility, which have been part of the Bologna Process from the start. The historical introduction, section 5.1, looks at the evolving discourse and developments concerning the different types of mobility. It discusses the dimensions of attractiveness and balance, issues of recognition, portability of grants and loans, the external dimension and curricular internationalisation as well as neglected aspects of internationalisation in the framework of the Bologna Process that may be relevant to consider in the future. Section 5.2 focuses on the statistical data to complement this picture with the latest data on mobility trends. It provides insights regarding the attractiveness of the EHEA and the balance of incoming and outgoing students in the member countries.

The qualitative data presented in section 5.3 addresses the issue of portability of grants and loans as well as the support of disadvantaged groups for mobility, providing the state of play on action to meet policy commitments.

The 2018 Paris Communiqué

The Paris Communiqué underlines the unique character of the Bologna Process, both its intergovernmental and transnational character. It stresses that in the past 20 years, governments, higher education institutions and other stakeholders have worked together to bring about the key joint objectives of large-scale mobility and mutual trust. Ministers express their ambition to further enhance the cooperation in the areas of higher education, research and innovation, for the very purpose of 'increased mobility of staff, students and researchers' (p. 4). They consider automatic recognition of comparable higher education qualifications a key factor to 'fully develop mobility and recognition across the EHEA' (p. 2). The Communiqué also mandated this report on the past 20 years in order to '(assess) the main developments in the EHEA since the Bologna Process began, including to what extent we have fulfilled the mobility target agreed in Leuven/Louvain-la-Neuve in 2009' (p. 4).

Key messages

- The Bologna Process itself has been both a manifestation and a catalyst for internationalisation.
- Although EHEA countries have fallen short of the 20 % target for graduates experiencing international mobility during their studies, absolute numbers of mobile students have grown significantly throughout the Bologna Process.
- Only four EHEA members have put in place long-term quantitative policy objectives related to mobility of disadvantaged students. Social inclusion should therefore receive greater priority in future policy planning of learning mobility.

5.1. History of progress and challenges in internationalisation

5.1.1. Introduction

This section deals with internationalisation in the Bologna Process. Internationalisation in general and mobility in particular (of students and, to a lesser extent, of staff) existed already before the Bologna Process and was thus not new. Nevertheless, it received a major boost from the decision to create the EHEA. Historically, in the Bologna Process as well as in the general discourse on internationalisation, mobility was the main focus. Or, to be precise, mobility plus mobility-related issues, such as the recognition of credits and degrees, scholarships for study abroad or state grants and loans and their 'portability'. In parallel with a widened concept of internationalisation in the public discourse, the themes, issues and activities also grew in the Bologna Process. Curricular internationalisation is one example, 'internationalisation at home' (providing non-mobile students with internationally relevant knowledge and experience), international/global marketing or cross-border provision of higher education are others. Not all of these new internationalisation dimensions found their way into the Bologna Process equally forcefully. However, by and large, the discourse on internationalisation inside the Bologna Process developed roughly in parallel with the general debate on, and practice in, internationalisation outside of it.

While researchers and practitioners alike agree that the concept of internationalisation has widened considerably over the last 20 or even 30 years, there is no full consensus on what the phenomenon includes and excludes. There is no shortage of definitions. Yet as a result of the attempt to adapt to an ever-increasing number of issues, themes and activities regarded as part of internationalisation, they are very general and thus offer little practical guidance. On top of this, some often quoted definitions are self-referential, i.e. they presuppose a consensus on the meaning of the term international.

The opaqueness of the term internationalisation is important for this text, which aims to assess the achievements and shortcomings of the Bologna Process in the area of internationalisation. Attempting to identify the – many – achievements and the – few – challenges raises a methodological problem. Against which exact understanding of internationalisation would achievement be measured?

This historical overview is divided into four subsections. Section 5.1.2 is devoted to (physical) mobility as well as to mobility-related aspects, including recognition challenges and funding instruments for mobility. Section 5.1.3 deals with the 'external' dimension of the Bologna Process (later referred to as the 'Bologna Process in a Global Setting'), and to curricular internationalisation. Section 5.1.4 considers some aspects of internationalisation which have received little or no policy attention within the Bologna Process.

5.1.2. Mobility

The two-cycle system and evolving discourse around mobility

Supporting the international mobility of students (and staff) has been not only the most often recurring theme in the discourse around structural reforms brought about by the Bologna Process, but also the very rationale of this supranational initiative – or at least the officially-stated one. The introduction of the new (for most European countries) architecture of study programmes and degrees – the Bachelor, Master and (later in 2003) PhD structure – was presented as creating a European area of higher education with 'easily readable and comparable degrees' that would help increase 'the international competitiveness of the European system of higher education' and allow it to acquire a 'world-wide

degree of attraction' (Bologna Declaration, 1999). The ambition was for member countries to become able to attract more foreign students externally, from beyond the European Higher Education Area (EHEA), while the EHEA itself would also be "a key way to promote citizens' mobility" internally, as stated in the founding declaration.

While it would seem reasonable to expect that increased structural similarity of study programmes and degrees would boost mobility, it is noteworthy that dissimilarity was not previously mentioned as a key mobility obstacle in the mainstream literature, whether for credit or degree mobility. For example, evaluation studies on ERASMUS-mobile students, conducted already in 1997, showed that in the eyes of credit-mobile students other concerns primarily affected participation in mobility. These were financial barriers, low organisational support and insufficient language proficiency (Teichler, U., 2019), as evidenced also in the series of Eurostudent surveys that have run throughout the Bologna Process.

With the related literature not pointing to structural differences as a key mobility obstacle, it is hard to say with certainty how the idea originated that common degree structures would stimulate mobility. But towards the end of the 1990s, the 'two-cycle system' was shared by most countries outside of Europe, hence the potential conclusion that adopting a similar system across Europe could, if not boost mobility, at least ease access to full-degree studies for students coming from these countries. Additionally, one particular country in Europe – the United Kingdom (UK) – might have served as inspiration. The UK already had the two-cycle system fully in place and was also the biggest receiver of incoming foreign students in Europe, and in the top three in the world – thus a good European example of a two-cycle higher education system that was very attractive for internationally-mobile students.

Throughout the now over twenty years since the inception of the Bologna Process, student (and staff) mobility have remained an omnipresent theme in the core documents – the Ministerial Communiqués – accompanied by a large array of supportive measures, attempts for coordinated action, and serviced by dedicated working groups operating under various denominations. Ministerial communiqués regularly reconfirmed the centrality of student mobility for the EHEA. It was reaffirmed as 'of utmost importance' (Prague, 2001), as 'the basis to establish EHEA' (Berlin, 2003), as one of the key objectives (Bergen, 2005), as a core element, along graduate mobility (London, 2007), as 'the hallmark of EHEA' (Leuven/Louvain-la-Neuve, 2009), as one of three key objectives (Bucharest, 2012) and as a central one (EHEA Mobility Strategy, 2012). Most recently, the Bologna Process is perceived as having 'paved the way for large-scale student mobility' (Paris, 2018).

An entire host of policy documents and regular reports deal with mobility-related matters in the EHEA context: from the Ministerial communiqués, to dedicated working groups and ensuing monitoring processes leading to stocktaking, and later implementation reports, to analyses produced by stakeholder organisations, e.g. the 'Trends Reports' by EUA, ESU's Bologna With Student Eyes series, the Eurostudent publications, and commissioned evaluation studies. Beyond emphasising the promotion of student (and staff) mobility as such, they tackled a broad array of mobility-related elements, including support and monitoring of:

- The removal of remaining mobility obstacles (from 1998, in the Sorbonne Declaration, onwards), of which two – recognition challenges and financial barriers – received special attention;
- The development of integrated study programmes (since 1999), mobility windows (2009), and joint programmes (mentioned in 1998, and encouraged since 2001), as well as the related European Approach for Quality Assurance of Joint Programmes (adopted in 2015);
- Improving recognition through the use of ECTS, Diploma Supplement, ratification and implementation of the Lisbon Recognition Convention (since 1998 as well, with regular occurrence and emphasis) and later, 'automatic recognition' (2012, 2015 and 2019);

- The social dimension of mobility (since 2001);
- Efforts for increased portability of national student grants and loans systems (since 2003);
- Mobility and/or internationalisation strategies (from 2012 onwards);
- Inclusion-related aspects in mobility: promoting the mobility of teacher education students (2015), of students from conflict areas (2015) and of refugee students (2019).

While it can be argued that at specific times in the history of EHEA other themes (although often related to student and staff mobility) have been more in the limelight – e.g. the social dimension, quality assurance, and most recently, innovation in learning and teaching, etc. – student (and staff) mobility have constantly remained amongst the main objectives. Within the EHEA, mobility received the highest level of policy prioritisation in 2009, with the setting of the Leuven/Louvain-la-Neuve mobility target of having 20 % of EHEA graduates by 2020 with an international mobility experience, and then in 2012, with the launch of the Mobility for Better Learning strategy. This mobility strategy for the 2020 European Higher Education Area (EHEA) lists ten categories of measures to be taken at institutional, national and European level to reach the 20 % by 2020 target.

Comparing the discourse around mobility and related elements within the EHEA with that in the wider field of international higher education, as well as with policy developments within the European Union (EU) framework, it is clear that the debates do, in broad terms, mirror each other. The emerging foci – portability, mobility strategies, targets, automatic recognition, wider inclusion – (re)surface more or less around the same times in the different fora. In general, it remains difficult to trace back the true origin of each of these new ambitions and ideas, with the same policy actors being active in parallel in these multiple, yet interconnected, arenas.

There is nevertheless one notable exception in this discourse parallelism. At the EHEA policy level, student mobility has continued to be seen as a largely positive phenomenon (even at times when more balance in mobility flows was promoted) and has received continuous, unconditional support throughout the process's history. This happened despite 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.

A number of common discourses and reasons for opposing mobility and internationalisation have occurred with high frequency in national level discussions at different stages of the Bologna Process. There has sometimes been concern that national citizens would potentially be subsidising the costs of educating foreign nationals. Related to this is a perceived link between foreign students and higher immigration. In some countries, there is a fear that higher education institutions may attract 'any' foreign students indiscriminately as opposed to the more desirable 'top talent'.

Partly as a response to this, several countries have introduced tuition fees for non-EU/EEA incoming students – ostensibly as a means to control the 'quality' of international applicants. Particularly in smaller countries, there is concern about the survival of national languages in academia if English-taught programmes are further developed. Language of instruction as a topic has sometimes also been linked to access inequalities, with a concern that domestic students study only in national language programmes and international students in those offered in a widely spoken language – usually English. Finally, there is often a perceived disconnect between internationalisation and local communities, with internationalisation too often having been treated as an end in itself rather than as a tool to deliver on the three core university missions.

Overall, it can be argued that the education ministers (who from the start deliberately placed the Bologna Process outside the EU policy framework, making it an intergovernmental process) have been visibly more positive to mobility-related objectives in the EHEA context than they are in the EU

framework. Nevertheless, in the Bologna Process context, they lack the fully-fledged implementation mechanisms and the EU conditionality. Hence the new focus on taking implementation forward (Paris Communiqué, 2018) with its focus on the implementation of the key commitments of degree structure reforms, quality assurance and recognition.

Types of mobility and mobility target(s)

Going back to the founding documents of the Bologna Process, while student mobility is centrally mentioned from the beginning, the type of mobility – degree or credit – and the direction of mobility – incoming or outgoing – was not immediately apparent. It can be inferred though from the first declarations that the initial central objective, in line with the discourse on increasing attractiveness, was to boost incoming degree mobility. Eventually, however, the three-cycle structure has also facilitated intra-EHEA credit mobility to a large extent.

Degree mobility

In the absence of comprehensive and comparable data on both degree and credit mobility, the number of incoming degree-seeking students was consistently utilised as a proxy for assessing the degree of attractiveness of the EHEA. Although in the early years, member countries systematically stayed away from setting targets, the majority of them (29) did nevertheless, by 2018, set targets for inward degree mobility at national level (Bologna Process Implementation Report 2018).

While inward mobility trends have regularly been monitored, paradoxically, though partly understandably, no system-level assessment of the impact of the three-cycle architecture on incoming degree mobility from non-EHEA countries – i.e. the initial goal – was ever performed. Independent preliminary assessments seem to indicate that the Bologna Process might have increased the popularity of the EHEA as a study destination compared to other host countries and regions in the period 1999-2007, while this impact is likely to have levelled off or to have been much more modest in the subsequent decade (Teichler, 2019). However, fully placing causality for these developments in the Bologna Process is not currently possible. Isolating the potential effects of the Bologna degree architecture and related mobility support measures from those taken in other fora and at other levels would require a yet-to-be-seen degree of methodological innovation. The patchy state of international data collections on student mobility further challenges such a fully-fledged evaluation.

Beyond the objective of making the EHEA more attractive for non-EHEA students, and possibly in line with the initial objectives, what the two-cycle system ultimately achieved for most European countries was opening a new access point for degree-mobile students, both from outside and from within the EHEA – the Master level. As a result of its shorter duration, the Master level was more easily ‘internationalisable’, particularly in European countries without widely-spoken languages, for which opening up to international students meant starting to teach partly or fully in a foreign language (mostly English). Nowadays, the majority of degree-mobile students in the EHEA are studying at Master level.

Credit mobility

In the first decade of the process, intra-EHEA credit mobility was primarily tackled through a wide array of support measures. The year 2009 marked a policy turn, with the setting of the 20 % of EHEA graduates with an international mobility experience by 2020 mobility target, thus putting the focus on outgoing mobility.

The 2012 Mobility Strategy brought much-needed conceptual clarification, namely that the target: a) refers to physical mobility (after some speculation that it could also include online forms) in all three cycles, and that it covers b) periods spent abroad in the context of studies of at least three months or

equivalent to 15 ECTS (with the minimum threshold of 1 ECTS being considered at some point), as well as c) stays that result in a full degree being granted abroad.

The inclusion of outgoing degree mobility, in addition to credit mobility, gave the potential for the value of the three-cycle structure to be demonstrated, and in particular for the first cycle (bachelor) to be properly recognised as a self-standing qualification. The international data collection on degree mobility was also more established, and thus more reliable than for credit mobility. In addition, the 20 % target seemed extremely ambitious for many systems for credit mobility alone; thus the inclusion of degree mobility potentially allowed such systems to be closer to the target. Interestingly though, available data from national-level graduate surveys show that the 20 % target was already surpassed in the early 2000s in several European countries, while most others were at considerably lower levels, of between 2 % and 5 % (Teichler, 2019). The target remains thus largely relevant for the latter group.

It is clear though from this analysis that in 2009, when the target was first set, the mobility realities and trends for both the EHEA as a whole and for individual member countries were not fully known, and neither was the state of development of mobility data collections and their reliability. Although it can be argued that the target-setting process could have benefitted from a more thorough preparatory stage, (by building on the actual mobility situations of EHEA countries), it did nevertheless have important positive consequences. It created new momentum for international student mobility, by repositioning it at the top of the ministerial agenda. And, after the matching EU mobility benchmark was set in 2011, it also gave a significant push to improving the international data collections on mobility in general, and on credit mobility in particular – even if this remains work in progress.

A call for balance in mobility flows

As of 2007, the London Communiqué, the pursuit of more balanced mobility flows became an EHEA objective that has never left the EHEA agenda until the present day. With the 2009 Communiqué, this aim was clearly shaped into an internal objective – balance within the EHEA. The discussion about balance in the EHEA context was a matter of perspective. Several influential member countries belonged to the group of ‘attractive systems’ (i.e. had large flows of incoming degree-seeking students, and comparatively small outflows) (EHEA Implementation Report 2012). Some of these countries experienced very particular types of imbalances – too high inflows of foreign students in medical and paramedical studies, which limited the access of domestic student to these fields of study, and ever-growing numbers of incoming students. Public debate focused on the value of educating foreigners for free or at a low cost from national taxpayers money (e.g. Austria and the French Community of Belgium).

A few interesting observations can be made about the incorporation of this objective in this policy process. First, although balance was initially set as an internal objective, mobility flows between EHEA countries were much more balanced than flows between EHEA and non-EHEA countries (Ferencz, 2015), where the ‘real’ imbalances occurred. The EHEA Mobility Strategy thus adds, in 2012, also the objective of having more balanced mobility with non-EHEA countries. Second, although balance was, and still is, sought in degree mobility, reciprocity is a characteristic of credit mobility, where the funding bodies have, through the amount of scholarships they provide, the financial means to control the flows. As most degree-mobile students are free movers, governments have very little positive means for intervention (apart from the not-so-positive courses of actions such as imposing quotas). Third, although balanced mobility is endorsed as an objective, particular types of imbalances have been not only tolerated, but actually actively pursued by many EHEA and non-EHEA countries.

Generally, most countries have aspired over time to become ‘attractive systems’ in degree mobility (heavily imbalanced towards inflows), rather than to be in the situation experienced by ‘closed’ (low rates of outgoing students, and even lower incoming) or ‘limited’ (high outward mobility, with excess

over incoming) systems. And finally, the feasibility of this objective comes into question, given that correcting imbalances at EHEA level would require concerted action to limit inflows and/or increase outflows of some countries, while simultaneously increasing inflows and/or lowering outflows from others, with few countries likely to have the necessary resources for such actions.

Nowadays, balance is still on the agenda as a policy objective and subject to the monitoring process, but with little likelihood of success in remedying imbalances in degree mobility. Indeed there is very little evidence of member countries taking bilateral or multilateral actions to correct imbalances, as recommended in the EHEA Mobility Strategy (2012), beyond those measures (largely of a financial nature) that were already in place before 2007.

Striving for full recognition

Despite concerted efforts to ensure recognition of comparable degrees and of periods of study/internships done abroad that pre-date the Bologna Process – e.g. the Lisbon Recognition Convention (1997) on the recognition of foreign qualifications and the creation of the ECTS system, initially to support ERASMUS mobility only – recognition remains one of the most resilient barriers to degree and credit mobility (DZHW, 2016). In the EHEA context, official documents made regular reference since 1999 to the ratification and the uniform compliance with the Lisbon Recognition Convention, the use of the Diploma Supplement, including in its revised form adopted in 2019, as well as the convergent implementation of the initial and the revised (2015) ECTS system and user guide (see Chapter 2, sections 2.7 and 2.8).

Trying to push a breakthrough in recognition, the Bucharest Communiqué (2012) asked for the establishment of a pathfinder group of countries to explore how ‘automatic recognition’ of comparable degrees could be achieved, a commitment reiterated in the Yerevan Communiqué (2015), striving towards a system where comparable degrees from an EHEA country are automatically recognised in other EHEA countries. To date though, only a few countries have established automatic recognition areas between themselves (see Chapter 3, section 2).

In practice, and particularly in credit mobility, many countries and higher education institutions still struggle with partial recognition, and even in cases where recognition seems to have been fully granted, the mobility period may not always be recognised as a part of the core curriculum, resulting in an extension of studies for the mobile students. One reason for this continuous struggle for recognition could be a lack of perceived academic value in studying abroad. In any case, these barriers to mobility call for enhanced mobility support schemes and better organisational practices both at home and host universities.

State grants and loans

A – if not the – major obstacle to becoming mobile is, particularly in the perception of students, the additional cost of studying in another country. In order to lower the financial hurdles, a number of funding programmes for the particular purpose of studying (or interning) abroad have been created, such as Erasmus+ for EU and programme countries, as well as regionally and nationally funded schemes. Additionally, the ministers for higher education have, from early on in the Bologna Process, set high hopes on making their national loan and grant schemes for students ‘portable’, i.e. usable not only for study at domestic, but also at foreign higher education institutions.

The first mention of the portability of grants and loans can be found in the Berlin Communiqué (2003). In this document, ministers agreed to ‘take the necessary steps to enable the portability of national loans and grants’. From then onwards until today, the issue regularly appears in official EHEA documents. While the issue was and remains of high political importance, it has rarely been the object of empirical research. In the year 2004, CHEPS had published some valuable findings on state grants

and loans, but portability was not a central aspect of the research. This changed with the publication of the ACA study, 'Portable State Grants and Loans' in 2013 that was based on a survey of such funding instruments in 31 countries in Europe (Lam et al., 2013).

First, the study found that in Europe's Nordic region, close to 100 % of all students receive this form of support irrespective of their socio-economic situation (or that of their parents), and the support (grants and loans) is portable in almost 100 % of all cases. For example, almost every Norwegian credit- or degree-mobile student may also benefit from the financial support when studying abroad. Second, in most other countries where they exist, state grants and loans are means-tested or subject to other restrictions (geographical, disciplinary, etc.), with only a small share of the student body entitled to this form of support. The 'pool' of students who could potentially benefit from portability is therefore rather small, too. Third, take-up of the portability option is limited everywhere. The average take-up in the countries that provided data was 3.7 % (degree mobility only). Adding credit mobility, on which data are shaky, the estimated overall take up is about 5 %. To be precise, 5 % of those students entitled to state grants and loans (and not of all students) use them to study abroad. By and large, the findings of this study suggest that the full portability of the existing state grants and loans would only increase the potential for international mobility to a marginal extent.

Similar empirical research post 2013 is lacking, making it difficult to trace developments since then. There are the regular surveys on the portability situation in the EHEA countries (including in this chapter). But these surveys reflect the possibilities and limits for portability, which appear to have improved over the lifetime of the Bologna Process in a few countries. These improvements relate to the possibility of (and restrictions on) portability, not to the actual number of students becoming mobile with the help of these instruments.

5.1.3. Internationalisation

External dimension

Two major motivations led to the Bologna Process. They are related, but not identical. One is to create a single space of higher education in Europe, with similar structural features, transparency tools, etc., in which the mobility of students would be more easily possible than earlier on and in which student mobility would therefore increase considerably. The second motivation relates to the world outside the EHEA ('external motivation'). It was the conviction of the signatories of the Bologna Declaration that the new European system of higher education would exert a world-wide degree of attraction. This would also translate into increased student mobility by degree-mobile students from non-EHEA countries into the EHEA.

In the very first years of the Bologna Process, this 'external dimension' was largely forgotten. The Berlin Communiqué (2003) indirectly picks it up again, by a reference to the famous ambition of the 2000 Lisbon Strategy for Europe to become 'the most competitive and dynamic knowledge-based economy in the world'. But a real next step was only taken at the Bergen Ministerial Meeting (2005). The Bergen Communiqué devoted a whole section to the 'attractiveness of the EHEA and cooperation with other parts of the world' and it announced the setting-up of a BFUG working group to 'elaborate and agree on a strategy for the external dimension'.

The working group developed a document entitled 'European Higher Education Area in a Global Setting'. This Strategy for the External Dimension of the Bologna Process was adopted in London in 2007. Trying to strike a balance between the competition and the cooperation agendas characterising the Bologna Process as a whole, it identified five 'core policy areas', i.e.

- improving information on the EHEA;

- promoting the EHEA in order to enhance its world-wide attractiveness and competitiveness;
- strengthening cooperation based on partnership;
- intensifying policy dialogue with third countries; and
- furthering the recognition of qualifications.

The production of the 'external strategy' benefitted much from the report of one of the working group members, Pavel Zgaga, who demonstrated the high interest in and appreciation for the Bologna reforms all over the world (Zgaga, 2006).

Under changing names, the working group was continued beyond 2007, but it created few new impulses. The only policy area where action followed was the policy dialogue. This was, in part, the reaction to some non-European countries' interest to join the Bologna Process. It was decided not to change the existing membership criterion, i.e. that member countries must be signatory states of the Cultural Convention of the Council of Europe. At the same time, the existing members found that some form of structured cooperation should be created with non-EHEA countries. This way the Bologna Policy Fora were created. These meetings, in which ministers of EHEA countries meet their counterparts from all over the world, are held back-to-back with the ministerial meetings of EHEA member countries. They have been a feature of every ministerial meeting since 2009, involving participants from ministerial, stakeholder and civil society level. They aim to ensure policy dialogue and to strengthen partnership-based cooperation, on the issue of higher education reform in general but also on specific topics such as mobility, recognition or quality assurance ⁽⁷⁰⁾.

The Bologna Policy Fora have regularly taken place alongside the EHEA ministerial conferences. On this global level, it has been difficult to maintain continuous policy dialogue and related action between the ministerial conferences. As a follow-up to the Bologna Policy Forum in 2018, the Global Policy Dialogue Coordination Group was set up. Its aim was to establish more constant and regular dialogue between the parties involved ⁽⁷¹⁾.

The fact that the global meetings in the form of the Bologna Policy Forum have taken place every two or three years is the only thing that differentiates them from the four remaining policy areas, which lead their lives largely on paper.

In particular, the competitive elements of the strategy, for example promotion and marketing campaigns in third countries to attract students and young researchers into the EHEA, were not put into practice. While the member countries of the EHEA did, to varying degrees, market their higher education institutions globally and while many universities and colleges marketed themselves on a global scale, there was no major marketing activity at EHEA level. The EU funded some modest projects with a regional or global marketing angle, such as the Global Promotion Project (2006-2009), the European Higher Education Fairs (EHEFs) in the Asia Link Programme (2002-2010) and two 'Study in Europe campaigns' (2015-2017; 2018-2020), but the latter are initiatives with small budgets which are even decreasing over time. Importantly, they provide funds only for higher education institutions and stakeholders from the EU, and not from the entire EHEA.

The relative neglect of the 'competitive' side of the strategy was most likely not simply the result of an oversight. Re-reading the documents on the global dimension of the Bologna Process, there seemed to be a widespread expectation that structural innovations of the Bologna Process (three-cycle degree architecture, ECTS, quality assurance, etc.) would automatically render European higher education

⁽⁷⁰⁾ The European Higher Education Area (EHEA) in a global context: Report on overall developments at European, national and institutional levels, Approved by BFUG at its meeting in Prague, 12-13 February 2009, p. 12.

⁽⁷¹⁾ Statement of the fifth Bologna Policy Forum, Paris, 25 May 2018, p. 2.

competitive and attractive to potentially mobile third-country students, and that there was thus no need to call for additional 'interventionist' measures, such as marketing and promotion.

The Bucharest Communiqué (2012) requested an evaluation of the global strategy, to be delivered by the time of the Yerevan Ministerial Meeting. In fact, no proper evaluation was carried out. The report of the 2012-2015 BFUG Working Group on Mobility and Internationalisation did, however, look into possible follow-up measures. It discouraged the setting of an EHEA-wide target for inward mobility from non-EHEA countries on the grounds that the cultures and structures of the higher education systems in the individual EHEA countries were too different, but it encouraged the setting of national targets instead.

These developments reflect the reality that cooperation and exchange stand at the core of the objectives and purposes of higher education. Individual countries and higher education institutions cooperate actively and naturally beyond the EHEA on joint projects in research and teaching, and indeed such work has been continually intensifying as inter-connection has been facilitated by improvements in communications technology. Approaching issues in a global policy framework involving the EHEA and other world regions has so far proved to be much more challenging.

Curricular internationalisation

The internationalisation of curricula is only at a first glance a matter different from that of the international mobility of students. The different forms of internationalised curricula that have been considered within the Bologna Process are integrated study programmes, double and multiple degree programmes, and joint degree programmes (sometimes leading to a joint degree when legally possible). Structurally, all three types are the same, although many see reputational differences, with the joint programme and degree held up as the gold standard, the double or multiple degree as the silver and the integrated study programme as the bronze. The motive for the introduction of all three variants is clearly to facilitate mobility by structurally 'embedding' it in the curriculum in such a way that recognition issues are very unlikely to arise.

Integrated study abroad phases, double degrees and joint programmes all entail border-crossing mobility and enhance internationalisation. Even programmes taught in a language other than that of the country where the university is located tend to attract mainly international students. There are, however, also examples of outward-looking international curricula that are developed for national students.

It is worth noting that the internationalisation of curricula in European higher education set in long before the Bologna Process. The earliest double degree programmes in Europe were started in the late 1970s, probably as off-springs of the pre-Erasmus scheme Joint Study Programmes (1976-1984). The achievement of the Bologna Process is to have added to the emanations of curricular internationalisation existing before 1999 – the programmes including a recognised period studied in a partner university as well as the double degree – the joint degree, as well as to have strongly pushed for the introduction of curricula with 'embedded mobility' or 'mobility windows'. The joint degrees were, of course, introduced through the Erasmus Mundus Programme, but the support from the signatory states of the Bologna Declaration 'knighted' this curricular construction.

It is also worthwhile to look at the different rationales behind double, multiple and joint degrees. The integrated study programmes and double degrees had originally (i.e. in the 1970s, 1980s and 1990s) been developed in order to open up other countries' labour markets for graduates. At the time, there was not much hope that an Italian employer would hire a Danish student with a Danish degree. For this to happen, the graduate needed an Italian degree. With the harmonised Bologna degree structure, such worries could have been expected to fade away and with them, the need for double degrees.

However, we are not witnessing a weakening of the appeal of these types of programme. This can perhaps be explained by legal and administrative obstacles in the way of joint degrees in many EHEA countries. According to estimates provided in the Bologna Process Implementation Report of 2018, across the EHEA only about 5 % of higher education institutions award joint degrees. (Eurydice/EACEA 2018). Nevertheless, one of the difficulties to report in this area is that there is no comprehensive source of information on joint programmes. The best available information is from the U-Multirank tool that contains information from 2019 on 12 500 joint study programmes across 24 subject areas. However, there is no information on numbers of students enrolled in these programmes. Hence the finding of the Trends V Report (2007) that student numbers in joint and double degrees are small and that it is 'unlikely that joint programmes will be able to deliver the significant increase in international mobility that was perhaps expected by the Bologna reforms' (European University Association, 2007, p. 34) appears to be still valid today. Nevertheless more recent reports recognise that 'joint degrees (...) have become established formats for European and international exchange and collaboration and have given a competitive advantage to Europe and European higher education institutions' (European University Association, 2015).

That student numbers in programmes with embedded mobility are modest is also the result of an ACA study on 'mobility windows' of 2013. The authors conclude their study by the observation that 'the centrality of mobility windows in the European policy discourse stands in stark contrast to the numerical (in)significance of these forms of curricula-embedded international mobility'.

These remarks are not to be misunderstood as a criticism of the aforementioned forms of embedded mobility. They are welcome facilitators of mobility, even if the numbers of mobile students might not be high. One could even argue that in the case of the joint programme and the Erasmus Mundus Programme that developed it, the aim had never been numbers. Erasmus Mundus had been designed as a selective programme, which would fund the 'best students' only. In this sense, such programmes have acted as pioneers and catalysts to stimulate more widespread mobility and internationalisation. As Sursock has written in Trends 2015, joint programmes 'have become established formats for European and international exchange and collaboration and have given a competitive advantage to Europe and European higher education institutions' (Sursock, 2015, p. 48).

Dimensions of internationalisation not in the spotlight of the Bologna Process

The ultima ratio of the Bologna Process is the – quantitative and qualitative – enhancement of student mobility inside of, and into the EHEA. If only for this reason, it is relevant to take account not only of the internationalisation issues that the Bologna Process has picked up, but those which it has not.

The 'abstentious' attitude of the Bologna Process with regard to global marketing and promotion, in order to generate more (quality) student mobility from non-EHEA countries into the EHEA, has already been highlighted. Beyond this, three other issues have been widely discussed in internationalisation circles during part or all of the lifetime of the EHEA, but are little reflected in Bologna Process documents. These issues are 'internationalisation at home' (IaH), English-medium tuition (EMI), and transnational education (TNE).

IaH can be understood as integrating international and intercultural dimensions into the curriculum and experience for all students. It focuses on ways in which all students, and not simply those who study abroad, can benefit from internationalization, experiencing an international learning and teaching environment without necessarily studying abroad (Crowther et al., 2001). Strategies, which have been under development in many higher education institutions (64 % according to EUA's Trends 2015 report), typically consider internationalisation within curricula, involvement of all staff and students, and language. The 'European Universities' transnational alliances provide a new vehicle for this form of internationalisation to develop in the future.

None of the ministerial communiqués mention EMI. Nevertheless, the lifetime of the Bologna Process has seen a huge rise in the number of English-taught programmes offered by higher education institutions in EHEA countries where English is not one of the native languages. Three ACA studies published in 2002, 2007 and 2014 document the enormous rise in the offer of such programmes during the initial one and a half decades of the Bologna Process. While the first publication identified 727 programmes, the third counted close to 8 100. This rise is mirrored by the share of the number of EMI programmes of all programmes and, to a lesser extent, by the number of students enrolled in such programmes.

EMI is often regarded as a linguistic issue, since the language of instruction is different from the language(s) of the country where the programmes are offered. However, it is in essence a very pragmatic approach of countries with rarely spoken – and often ‘small’ – languages, which cannot hope to attract sizeable numbers of international students to their higher education institutions. Therefore – and not because it would be a superior medium of academic expression – these countries and many of their higher education institutions have opted for English as the language of instruction. This is warranted by the fact that the leading countries in the provision of EMI in Europe (in relative terms) are small states with not widely used languages.

Another issue which the key Bologna documents do not (adequately) reflect is transnational education (TNE), also known as cross-border provision. TNE is sometimes described as the ‘mobility of higher education institutions’. The best-known emanations of TNE are branch campuses of a university abroad. It is true that this type of education is not of the same importance in the internationalisation discourses of all EHEA countries. Still, it is very high on the agenda of some higher education systems, such as the British. The phenomenon is only mentioned three times in the major Bologna documents: The Prague Communiqué (2001) calls for cooperation between Bologna signatory countries to ‘address the challenge’ of TNE. The Bergen Communiqué (2005) asks for TNE to be governed by the European Standards and Guidelines, and the Leuven/Louvain-la-Neuve Communiqué (2009) makes reference to the UNESCO/OECD Guidelines for quality provision in cross-border higher education.

5.2. Statistical data

Assessing student mobility flows

This section provides data and analysis on student mobility flows, building on indicators previously published in the 2018 Bologna Process Implementation Report. Specific terms are used to describe the different forms of student mobility. Firstly, **degree mobility**, the long-term form of mobility, is the physical crossing of a national border to enrol in a tertiary level degree programme in the country of destination. **Credit mobility** is defined as temporary tertiary education and/or a study-related traineeship abroad within the framework of enrolment in a tertiary education programme at a ‘home institution’ for the purpose of gaining academic credits (i.e. credits that will be recognised at the home institution). The minimum length of stay should be at least three months in a row, or alternatively 15 ECTS credits.

There is also a distinction to be drawn regarding the direction of mobility flows. **Inward mobility** takes the perspective of the country of destination – the country to which the student moves to study. The inward mobility rate may be considered as an indicator of the country's attractiveness, relative to the size of its tertiary education system. **Outward mobility** takes the perspective of the country of origin – the country from which the student moves. While for many students this will be identical to the country of the student's nationality, it is more accurate to consider the country of permanent/prior residence or

prior education for data collection purposes. The outward mobility rate may be considered as an indicator of a pro-active policy for students to acquire international experience (particularly for credit mobility). However, it may also be an indicator of possible insufficiencies in the education system of the country of origin (particularly for degree mobility).

Before 2013, the UNESCO OECD Eurostat (UOE) joint data collection defined 'mobile students' as foreign students (non-citizens of the country in which they study) who have crossed a national border and moved to another country to study. Starting from 2013 reference year, the UOE definition is based on the country of origin understood as the country where the upper secondary diploma was awarded (or the best national estimate) and not the country of citizenship. 15 countries in the EHEA still use the foreign citizenship/nationality as criteria to define mobile students.

The main problem with using citizenship in this way is that it conflates genuine mobile students with those who may have moved to the destination country earlier, for example during school education. As a result, the indicator 'citizenship' provides an estimation of the foreign student population rather than providing an indication of inward learning mobility.

The first comprehensive data on credit mobility were made available in 2018 and provide information on the academic years 2015/16 and 2016/17 ⁽⁷²⁾. The data on the degree mobility component were progressively made available from 2015 onwards starting from academic years 2012/13. Therefore, data on both degree and credit outward mobility are finally available from 2016, although with limitations due to incomplete data coverage.

This section looks at three aspects of student mobility flows: Outward mobility, inward mobility and mobility balance. The report presents the total rates, and then takes a closer look at the differences in levels of student mobility between degree and credit mobility in the different cycles of higher education. Throughout the analysis, degree and/or credit mobility flows from abroad to the EHEA and degree mobility flows within the EHEA are examined separately.

Information on inward mobility from countries outside the EHEA includes data from all countries. For the outward mobility towards countries outside the EHEA, only Australia, Brazil, Canada, Chile, Colombia, Japan, New Zealand and the United States have been included due to issues with data availability and quality. For the EHEA country coverage, see the Glossary and Methodological Notes.

5.2.1. Outward mobility

When it comes to absolute numbers of (outward) mobility, the data show that a total of 6.3 million graduates had an international mobility experience in 2017, either in the framework of a study period abroad (credit mobility) or in the form of a full degree. This section of the report will look more closely at outward mobility by breaking this number down into mobility rates and percentages of total student populations and looking at the type and level of mobility as agreed with the EHEA mobility target in 2009, at the Leuven/Louvain-la-Neuve ministerial conference. Here, ministers agreed on the target that at least 20 % of those graduating in the EHEA should have had a period of higher education-related study or training period abroad by 2020 ⁽⁷³⁾.

The 2012 Mobility Strategy specified this mobility target: 'We include in our mobility targets the periods spent abroad corresponding to at least 15 ECTS credit points or three months within any of the three cycles (credit mobility) as well as stays in which a degree is obtained abroad (degree mobility)'.

⁽⁷²⁾ European Commission, 2017c. Progress report on a Learning Mobility Benchmark. COM (2017)148 final.

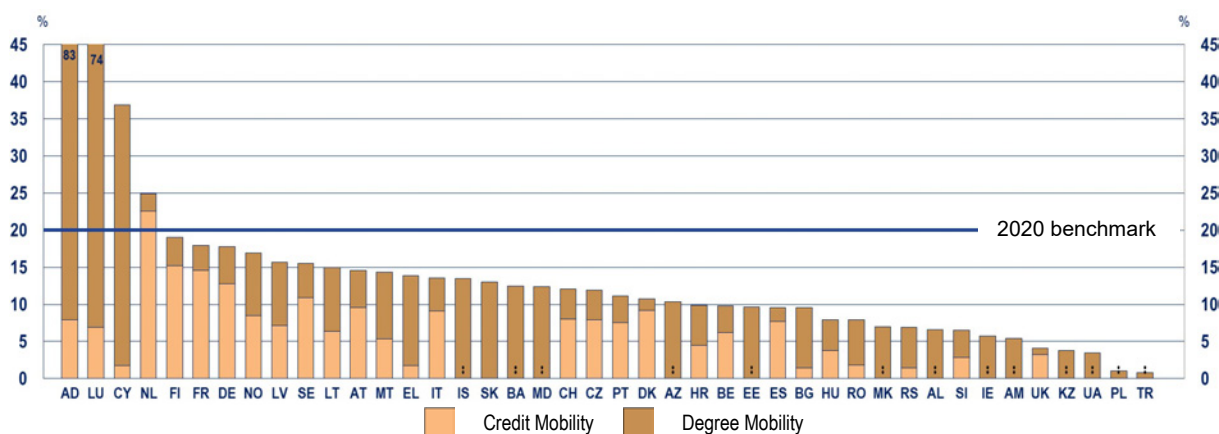
⁽⁷³⁾ Leuven/Louvain-la-Neuve Communiqué: The Bologna Process 2020 – The European Higher Education Area in the new decade. Communiqué of the Conference of European Ministers responsible for Higher Education, Leuven and Louvain-la-Neuve, 28-29 April 2009, p. 4.

As a common benchmark, this target set focuses only on outward mobility, and takes into account the total number of graduates in the EHEA.

The degree and credit outward mobility rate of a country for tertiary graduates shows the number of students who graduated abroad or spent a study-related period abroad, as a percentage of the total number of graduates from that country (i.e. the total number of graduates from the same country of origin). For a given country (of origin), the compilation of outward degree mobile students/graduates relies on the records of all other countries in the world. Indeed, only each hosting country can collect data on students/graduates from this country of origin in its own tertiary education system. Unlike degree mobility data, data on credit mobility are collected at the level of the country of origin, defined in this case as the country where the graduates are regularly enrolled/obtain their diploma (i.e. the country of full registration/graduation is where the institution of full registration – the ‘home institution’ – is located).

Figure 5.1 presents the outward (degree and credit) mobility rate of graduates who have graduated abroad or have received their tertiary education in another country in 2017, thus highlighting the different incidence of the two mobility components across the EHEA. This is therefore the central figure to measure progress towards the 20 % target set in the Leuven/Louvain-la-Neuve Communiqué.

Figure 5.1: Outward (degree and credit) mobility rate of graduates (ISCED level 5-8) by country of origin, 2016/17, (%)



	AD	LU	CY	NL	FI	FR	DE	NO	LV	SE	LT	AT	MT	EL	IT	IS	SK	BA	MD	CH	CZ	PT
Credit Mobility	8.0	6.9	1.7	22.6	15.2	14.6	12.8	8.5	7.2	10.9	6.4	9.6	5.4	1.7	9.1	:	3.7	:	:	8.0	8.0	7.5
Degree Mobility	83.0	73.6	35.2	2.3	3.8	3.4	5.1	8.5	8.5	4.6	8.6	5.0	9.0	12.1	4.5	13.5	13.0	12.5	12.4	4.1	3.9	3.6
	DK	AZ	HR	BE	EE	ES	BG	HU	RO	MK	RS	AL	SI	IE	AM	UK	KZ	UA	PL	TR	EHEA	
Credit Mobility	9.2	:	4.5	6.2	:	7.7	1.4	3.8	1.8	:	1.4	:	2.8	:	:	3.3	:	:	:	:	5.9	
Degree Mobility	1.6	10.4	5.4	3.6	9.6	1.9	8.2	4.1	6.1	7.0	5.5	6.6	3.7	5.7	5.4	0.8	3.8	3.5	1.0	0.8	3.5	

EHEA = EHEA weighted average

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

Notes:

Total outward mobility rates for country X are calculated as (outward degree-mobile graduates from country X + outward credit-mobile graduates who were not degree mobile from country X)/graduates originating in country X.

Graduates originating in country X are calculated as (total graduates in country X – inward mobile graduates from any other country to country X + outward mobile graduates from country X to any other country).

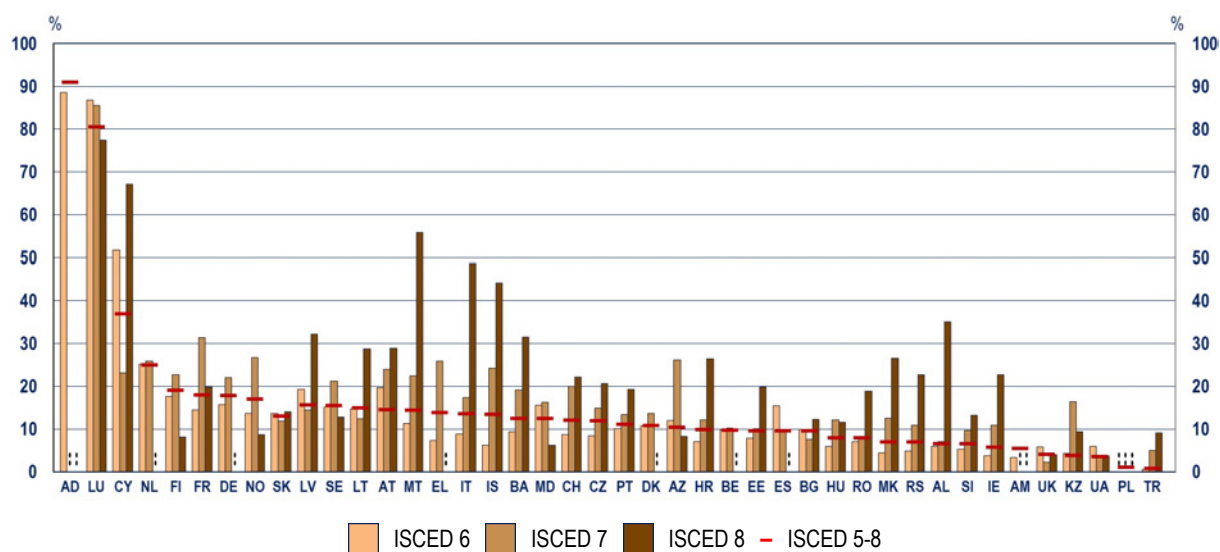
Overall, for countries with available data the total mobility rate stands at 9.4 %. This is a weighted average that is calculated by taking into account the respective total numbers of graduates of the EHEA and those graduates of the EHEA who have been degree mobile in order to derive the average. It thus falls some way short of the ambition set in 2009. 5.9 % of the graduates in tertiary education had a temporary experience abroad (credit mobility) and 3.5 % of them graduated abroad, i.e. in a country different from the one of their country of origin (degree mobility).

Apart from Andorra and Luxembourg, both with very strong mobility flows, Cyprus and the Netherlands surpassed the learning mobility benchmark of 20 % of national graduates. Finland stands very close to the goal with a rate equal to 19 %, while France and Germany reached 18 %. Norway, Latvia, Sweden, Lithuania and Austria follow the first top seven countries with a rate ranging from 17 % to 15 %. A share of less than 10 % was found in 18 countries. The lowest share (less than 5 %) of outgoing students who completed degrees or had a study-related period outside the country of origin was recorded in Kazakhstan, Ukraine, Poland, Turkey and the United Kingdom. However, in these countries, with the exception of the United Kingdom, no data were available for outward credit mobility.

Figure 5.1 also shows that among the best performers, the Netherlands, Finland, France and Germany record a higher percentage of credit mobile graduates than the percentage of degree mobile graduates, which did not exceed 6 % in any of these countries. On the other hand, in Luxembourg and Andorra, there were more degree mobile graduates (73.6 % and 83 %, respectively). The prevalence of degree mobility is particularly evident in Iceland, Greece, Slovakia, Bosnia and Herzegovina, Moldova and Cyprus.

Figure 5.2 shows the outward degree and credit mobility rate of graduates inside and outside the EHEA in 2017 by education level providing the ISCED level 5-8 average and then showing ISCED level 6-8 separately. It is at ISCED levels 6-8 that data collection across EHEA members is most complete and thus most comparable. The figure enables a more differentiated view of the overall mobility reality to emerge.

Figure 5.2: Outward degree and credit mobility of graduates, by country of origin and level of educational attainment, 2016/17, (%)



%	AD	LU	CY	NL	FI	FR	DE	NO	SK	LV	SE	LT	AT	MT	EL	IT	IS	BA	MD	CH	CZ	PT
ISCED 6	88.7	86.8	51.8	25.2	17.6	14.5	15.7	13.6	13.6	19.4	15.1	14.8	19.6	11.3	7.3	8.9	6.2	9.4	15.5	8.7	8.4	10.1
ISCED 7	:	85.5	23.1	25.9	22.7	31.4	22.1	26.8	11.8	14.4	21.3	12.4	24.0	22.4	25.9	17.3	24.3	19.1	16.3	19.9	14.9	13.3
ISCED 8	:	77.5	67.1	:	8.2	19.9	:	8.7	14.1	32.2	12.9	28.7	28.9	55.9	:	48.7	44.1	31.5	6.2	22.2	20.6	19.4
ISCED 5-8	91.0	80.5	36.9	24.9	19.0	18.0	17.8	17.0	13.0	15.7	15.5	15.0	14.6	14.4	13.9	13.6	13.5	12.5	12.4	12.1	11.9	11.1
	DK	AZ	HR	BE	EE	ES	BG	HU	RO	MK	RS	AL	SI	IE	AM	UK	KZ	UA	PL	TR	EHEA	
ISCED 6	10.7	12.0	7.0	9.8	7.9	15.5	10.0	5.9	7.1	4.4	4.9	6.0	5.2	3.7	3.4	5.9	4.3	5.9	:	0.5	9.6	
ISCED 7	13.7	26.2	12.1	10.2	10.1	9.8	7.6	12.1	7.6	12.6	10.9	7.0	9.7	10.9	:	2.2	16.5	3.6	:	4.9	16.1	
ISCED 8	:	8.3	26.4	:	19.9	:	12.3	11.6	18.9	26.6	22.7	35.1	13.2	22.8	:	4.0	9.3	3.8	:	9.1	17.3	
ISCED 5-8	10.8	10.4	9.9	9.8	9.6	9.6	9.6	7.9	7.9	7.0	6.9	6.6	6.5	5.7	5.4	4.1	3.8	3.5	1.0	0.8	9.4	

EHEA = EHEA weighted average

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

Outward mobility data by education level show that among first-cycle graduates (ISCED level 6), Luxembourg has one of the highest shares of graduates with mobility experience (87 %) together with Andorra (89 %), followed by Cyprus (52 %) and the Netherlands (25 %). Twenty countries had a share of first-cycle mobility below 10 %.

For second-cycle level graduates with mobility experience (ISCED 7), Luxembourg is found again at the top rank (85 %), followed by four countries (the Netherlands, Greece, Norway, France and Azerbaijan) with a share higher than 25 %. Sweden, Germany, Malta, Finland, Cyprus, Iceland and Austria also record relatively high shares (20 % or above) while the United Kingdom, Romania, Bulgaria, Albania, Ukraine and Turkey all have relatively low shares (8 % or lower).

At doctoral level (ISCED level 8), more than 50 % of the students originating from Malta, Cyprus and Luxembourg graduated or had a study-related period abroad. Apart from those three countries, another 12 countries recorded a high percentage of doctoral graduates with degree or credit mobility experience (22 % or higher). Only two countries, the United Kingdom and Ukraine, recorded levels of mobility experience below 5 % at this level.

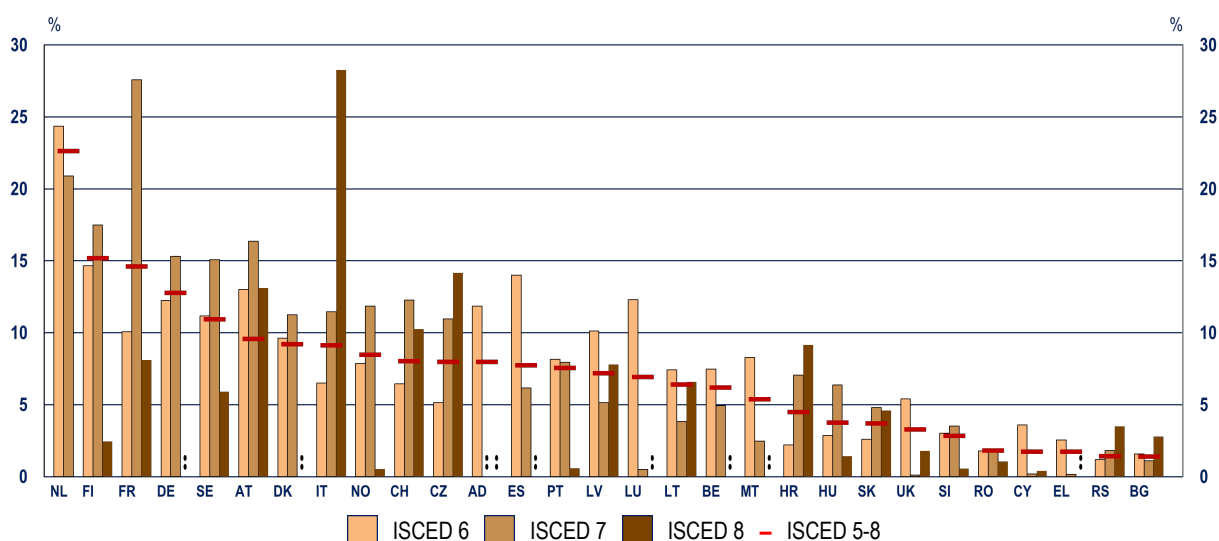
In 16 of the 42 countries analysed for which data for all ISCED levels is available the share of degree and credit outward mobility graduates increased as ISCED levels rose. In 31 of the 42 countries, mobility rates were higher at Master than at Bachelor level. Whereas the difference was minor (less than one percent) in Luxembourg, the Netherlands, Moldova, Belgium and Romania, in 13 countries mobility at ISCED level 6 was more than 50 % lower than at ISCED level 7.

Eight countries (Luxembourg, Cyprus, Slovakia, Latvia, Lithuania, Spain, Bulgaria and Ukraine) displayed the opposite trend – with mobility higher at Bachelor than Master level. The weighted average for degree and credit mobility in the EHEA is 9.6 % for ISCED level 6, 16.1 % for ISCED level 7 and 17.3 % for ISCED level 8.

It is thus noteworthy that if only ISCED level 7 (Master level) and 8 (doctoral level) were considered in relation to the 2020 target for mobility of graduates, the EHEA as a whole would actually be close to the 20 % target.

Figure 5.3 presents the percentages of outward credit mobility of graduates by ISCED level. It looks at credit mobility in particular to show the differences between ISCED levels across countries for this type of mobility. Limited data is available and thus the figure only shows the rates of 29 countries.

Figure 5.3: Outward credit mobility rate – tertiary mobile students from the EHEA studying in the country as a percentage of the total number of students enrolled, by country of destination and level of educational attainment, 2016/17, (%)



Source: Eurostat, OECD.

	NL	FI	FR	DE	SE	AT	DK	IT	NO	CH	CZ	AD	ES	PT	LV	LU	LT	BE	MT	HR	HU	SK	UK	SI	RO	CY	EL	RS	BG	EHEA
ISCED 6	24.4	14.6	10.1	12.2	11.2	13.0	9.6	6.5	7.9	6.5	5.1	11.9	14.0	8.2	10.1	12.3	7.4	7.5	8.3	2.2	2.9	2.6	5.4	3.0	1.8	3.6	2.5	1.2	1.6	6.3
ISCED 7	20.9	17.5	27.6	15.3	15.1	16.4	11.2	11.5	11.9	12.3	10.9	:	6.2	7.9	5.2	0.5	3.8	4.9	2.5	7.0	6.4	4.8	0.1	3.5	1.9	0.2	0.2	1.8	1.1	10.0
ISCED 8	:	2.4	8.1	:	5.9	13.1	:	28.2	0.5	10.3	14.1	:	:	0.6	7.8	:	6.6	:	:	9.1	1.4	4.6	1.8	0.6	1.1	0.4	:	3.5	2.8	4.6
ISCED 5-8	22.6	15.2	14.6	12.8	10.9	9.6	9.2	9.1	8.5	8.0	8.0	8.0	7.7	7.5	7.2	6.9	6.4	6.2	5.4	4.5	3.8	3.7	3.3	2.8	1.8	1.7	1.7	1.4	1.4	5.8

EHEA = EHEA weighted average

Source: Eurostat, OECD.

Notes:

Total outward mobility rates for country X are calculated as (outward degree-mobile graduates from country X + outward credit-mobile graduates who were not degree mobile from country X)/graduates originating in country X. Graduates originating in country X are calculated as (total graduates in country X – inward mobile graduates from any other country to country X + outward mobile graduates from country X to any other country).

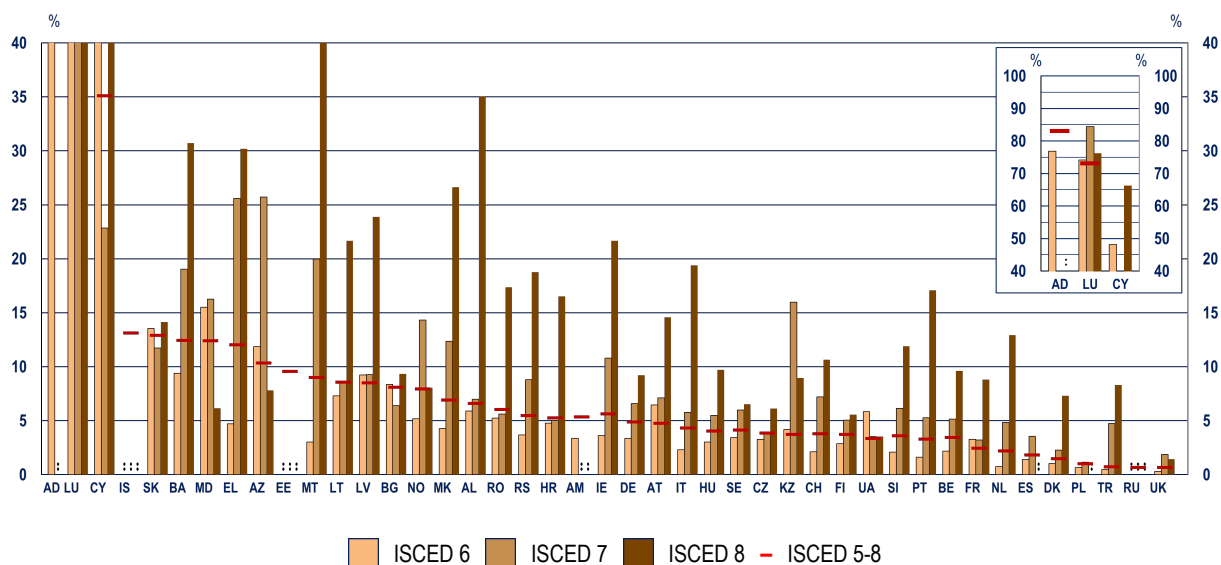
Credit and degree mobility are calculated considering only one component at the numerator.

The data show that only the Netherlands has passed the threshold of 20 % for both ISCED level 6 and 7 when it comes to outward credit mobility. The Netherlands also stands as the country where the most significant levels of mobility occur during the first cycle (24.4 %). France has surpassed this mark on ISCED level 7 with a rate of 27.6 %, but in contrast to the Netherlands has a much less significant mobility rate in the first cycle (10.1 %). Generally, the second cycle (ISCED level 7) is where the most significant levels of credit mobility have taken place.

The Netherlands, Finland, France, Germany, Sweden and Austria reach or surpass a rate of 15 % credit mobility in at least one of the ISCED levels, while 15 countries reach or surpass a rate of 10 % credit mobility in at least one ISCED level. In seven countries (Slovakia, Slovenia, Cyprus, Greece, Romania, Bulgaria and Serbia), the rate of credit mobility remains below 5 % for any of the ISCED levels.

Figure 5.4 focuses only on degree outward mobility graduates, i.e. the number of graduates who have received a degree in another EHEA country.

Figure 5.4: Outward degree mobility of graduates within the EHEA, by country of origin and level of educational attainment, 2016/17, (%)



Data (Figure 5.4)

	AD	LU	CY	IS	SK	BA	MD	EL	AZ	EE	MT	LT	LV	BG	NO	MK	AL	RO	RS	HR	AM	IE
ISCED 6	76.8	74.2	48.1	:	13.6	9.4	15.5	4.7	11.9	:	3.0	7.3	9.2	8.4	5.2	4.3	5.9	5.3	3.7	4.8	3.4	3.6
ISCED 7	:	84.4	22.8	:	11.7	19.0	16.3	25.6	25.7	:	20.0	8.5	9.3	6.4	14.3	12.4	7.0	5.6	8.8	5.0	:	10.8
ISCED 8	:	76.3	66.3	:	14.1	30.7	6.2	30.2	7.8	:	55.9	21.7	23.9	9.3	8.0	26.6	35.1	17.4	18.8	16.5	:	21.7
ISCED 5-8	83.0	73.1	35.1	13.1	12.9	12.4	12.4	12.0	10.3	9.5	9.0	8.5	8.5	8.1	7.9	6.9	6.6	6.0	5.5	5.3	5.3	5.6
	DE	AT	IT	HU	SE	CZ	KZ	CH	FI	UA	SI	PT	BE	FR	NL	ES	DK	PL	TR	RU	UK	EHEA
ISCED 6	3.4	6.5	2.3	3.0	3.4	3.3	4.2	2.1	2.9	5.8	2.1	1.6	2.2	3.3	0.8	1.4	1.0	0.7	0.5	:	0.3	3.3
ISCED 7	6.6	7.1	5.8	5.5	6.0	3.9	16.0	7.2	5.0	3.5	6.2	5.3	5.2	3.2	4.8	3.6	2.3	1.1	4.8	:	1.9	6.0
ISCED 8	9.2	14.6	19.4	9.7	6.5	6.1	8.9	10.7	5.5	3.5	11.9	17.1	9.6	8.8	12.9	:	7.3	:	8.3	:	1.4	12.6
ISCED 5-8	4.9	4.7	4.3	4.0	4.1	3.8	3.7	3.8	3.7	3.3	3.6	3.3	3.4	2.4	2.2	1.8	1.5	1.0	0.7	0.6	0.6	3.5

EHEA = EHEA weighted average

Source: Eurostat, OECD.

On average, the share of outward degree mobile graduates within the EHEA was 3.5 % in 2017. The outward degree mobility rate received its highest value in Andorra, (83 %) Luxembourg (73 %) and Cyprus (35 %). Although far from the rates in these three countries, in Iceland, Slovakia, Bosnia and Herzegovina, Moldova, Greece and Azerbaijan 10 % or more students graduated outside their country of origin. In contrast, 2 % or fewer students from Spain, Denmark, Poland, Turkey, Russia and the United Kingdom graduated in other EHEA countries.

In the majority of reporting countries, the share of outgoing degree graduates in bachelor or equivalent programmes (ISCED 6) within the EHEA was below 16 % in 2017. In Andorra, Luxembourg and Cyprus, the degree outward mobility rate was higher than 48 %. Countries at the other end of the spectrum (Portugal, Spain, Denmark, the Netherlands, Poland, Turkey and the United Kingdom) recorded an outward degree mobility rate that did not exceed 2 %.

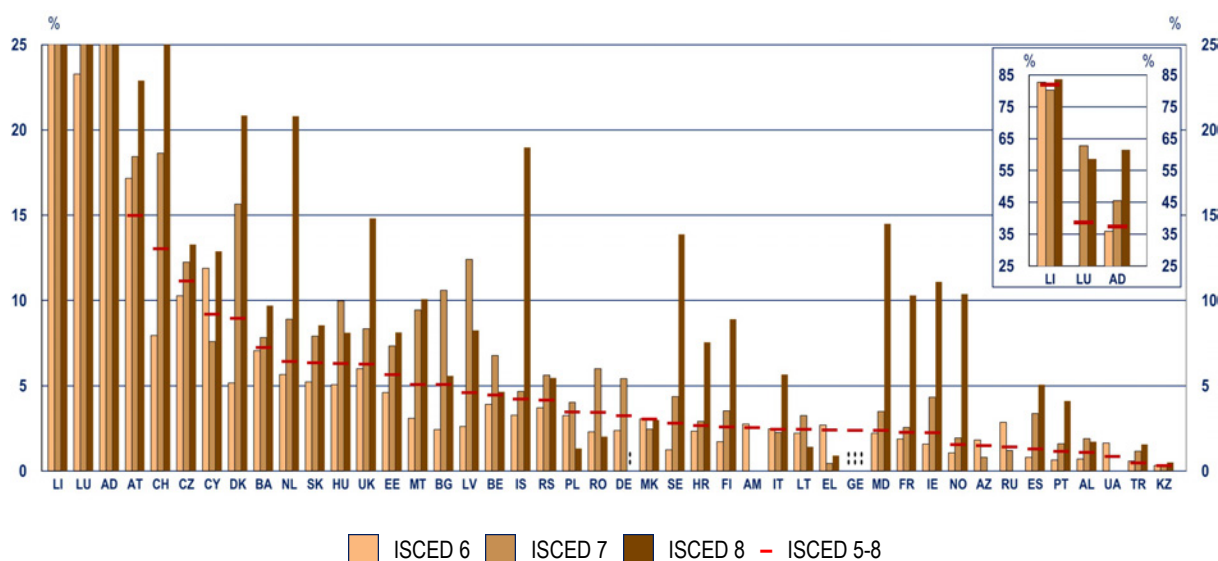
More than a quarter of second-cycle (ISCED 7) graduates from Greece, Azerbaijan and Luxembourg obtained a degree in another country within the EHEA – with the largest percentage of graduates originating from Luxembourg (84.4 %). In Malta, Cyprus, Bosnia and Herzegovina, Moldova, Greece, Azerbaijan and Kazakhstan, this share ranged from 15 % to 26 %. Similar to the case of first-cycle graduates, Denmark, Poland and the United Kingdom recorded the lowest rates (3 % or lower).

At doctoral level (ISCED 8), more than half of the graduates from Cyprus (66 %), Malta (64 %) and Luxembourg (76 %) completed their studies in another EHEA country. The lowest shares were observed in Ukraine as well as the United Kingdom (lower than 5 %).

5.2.2. Inward degree mobility

Figure 5.5 presents the percentage of mobile students coming from inside the EHEA to individual EHEA countries. It compares the share of mobile students with the total student population in the EHEA destination country. The purpose of this indicator is to provide an estimation of the attractiveness of each EHEA country for degree students who originate from another EHEA country. The indicator measures the inward mobility flow from the rest of the EHEA to each EHEA member.

Figure 5.5: Incoming degree mobility rate per level of educational attainment within the EHEA, 2017



	LI	LU	AD	AT	CH	CZ	CY	DK	BA	NL	SK	HU	UK	EE	MT	BG	LV	BE	IS	RS	PL	RO	DE
ISCED 6	82.7	23.3	35.9	17.2	7.9	10.3	11.9	5.2	7.0	5.6	5.2	5.1	6.0	4.6	3.1	2.4	2.6	3.9	3.3	3.7	3.3	2.3	2.4
ISCED 7	80.3	62.8	45.5	18.4	18.6	12.2	7.6	15.6	7.8	8.9	7.9	10.0	8.3	7.3	9.4	10.6	12.4	6.8	4.7	5.6	4.0	6.0	5.4
ISCED 8	83.7	58.7	61.5	22.9	41.3	13.3	12.9	20.8	9.7	20.8	8.5	8.1	14.8	8.1	10.1	5.6	8.2	4.6	19.0	5.5	1.3	2.0	:
ISCED 5-8	82.0	38.7	37.4	15.0	13.0	11.1	9.2	8.9	7.2	6.4	6.3	6.3	6.3	5.6	5.1	5.1	4.6	4.4	4.2	4.1	3.4	3.4	3.2
	MK	SE	HR	FI	AM	IT	LT	EL	GE	MD	FR	IE	NO	AZ	RU	ES	PT	AL	UA	TR	KZ	EHEA	
ISCED 6	3.1	1.2	2.3	1.7	2.8	2.5	2.2	2.7	:	2.2	1.9	1.6	1.1	1.8	2.8	0.8	0.6	0.7	1.6	0.6	0.3	2.7	
ISCED 7	2.5	4.4	2.9	3.5	0.0	2.3	3.3	0.5	:	3.5	2.6	4.3	1.9	0.8	1.2	3.4	1.6	1.9	0.0	1.2	0.3	4.1	
ISCED 8	3.0	13.9	7.6	8.9	0.0	5.7	1.4	0.9	:	14.5	10.3	11.1	10.4	0.0	0.0	5.1	4.1	1.7	0.0	1.6	0.5	8.1	
ISCED 5-8	3.0	2.8	2.7	2.6	2.5	2.4	2.4	2.4	2.4	2.4	2.3	2.2	1.5	1.5	1.4	1.3	1.2	1.1	0.8	0.5	0.3	2.6	

EHEA = EHEA weighted average

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

Apart from small countries like Liechtenstein, Luxembourg and Andorra, who host very high shares of students from other EHEA countries, Austria, Switzerland and Czechia also show high shares of degree-seeking incoming mobile students (above 10 %). The countries with the lowest share of incoming students from the EHEA are Ukraine, Turkey and Kazakhstan (less than 1 %).

Across ISCED levels, and considering all countries, it can be seen that the number of countries which hosted more than 10 % of mobile students increased with the ISCED level. Indeed, 17 countries attracted more than 10 % of doctorate students, as compared to 10 countries that received second-cycle level students (ISCED 7) at a rate higher than 10 %, and six countries with incoming first-cycle (ISCED 6) degree mobile students at the same rate (Liechtenstein, Luxembourg, Andorra, Austria, Czechia and Cyprus).

Liechtenstein, Andorra and Luxembourg received high numbers of doctoral students (ISCED level 8), with more than 50 % students coming from other EHEA countries. Switzerland also hosted about 41 % of incoming mobile students at ISCED level 8 from the EHEA, followed by Austria, Denmark and the Netherlands (at a rate close to 20 %).

With the exception of the Netherlands, the same countries were at the top rank of second-cycle degree mobile students, with a rate higher than 14 %. At the other extreme, Norway, Albania, Portugal, Turkey, Russia, Azerbaijan, Greece and Kazakhstan received the lowest rate (below 2 %) of degree mobile students at ISCED level 7.

In the majority of countries, the percentage of first-cycle incoming mobile students (ISCED level 6) was lower than 5 %, signifying that students at lower ISCED levels tend to move less frequently to another country for their studies. Liechtenstein, Andorra and Luxembourg are found again among the top, together with Austria, Cyprus and Czechia (10 % or higher). Spain, Portugal, Albania, Turkey and Kazakhstan received the lowest rates of incoming degree mobility, remaining below 1 %.

5.2.3. Mobility balance

The aspiration for more balanced mobility was reinforced in the Bucharest Communiqué and the 2012 Mobility Strategy, in which EHEA ministers asked for more balanced mobility (especially for degree mobility), 'since it has a sustained effect on the host and home countries, can facilitate capacity building and cooperation and may lead to brain gain on the one side and to brain drain on the other' ⁽⁷⁴⁾. That being said, it may be worth pointing out that there is no definition of 'balanced mobility' at European level. The Working Group on Mobility (2009-2012) tried to elaborate an appropriate definition of 'balanced mobility' without reaching a final conclusion. Nevertheless, several main ideas were put forward, such as: 'Even if there are specific imbalances, mobility itself is good and therefore should not be restrained' and 'Only awareness and capacity building in the home countries can sustainably reduce brain drain'.

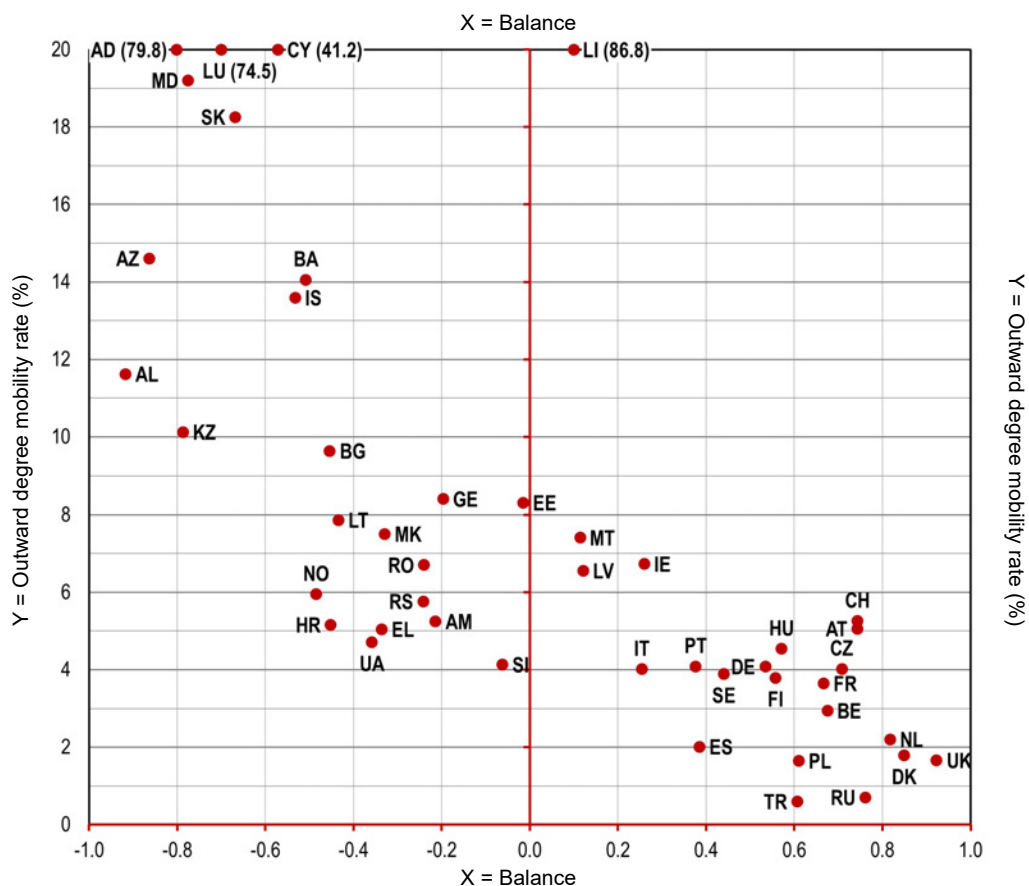
The concept of balanced mobility has various aspects. For example, assuming that mobility is desirable, balanced mobility at low levels of mobility (low inward and low outward mobility rates) may be perceived as less positive than balanced mobility at high levels (high inward and high outward mobility rates).

Figure 5.6 provides information on the (degree) mobility balance in 2017. Whereas the X axis indicates the mobility balance, it does so with reference to the outward degree mobility rate of the respective country depicted in the Y Axis. Hence, the figure shows how balanced the mobility flow of the respective country is with regards to its outward flows.

How far are outward and inward flows balanced? The figure shows an obvious inverse relationship between the mobility balance on the X axis (measured against all students in the countries) taking the outward mobility rate on the Y axis (measured against all students originated from these countries) as point of orientation. Both axes include mobility flows within and outside the EHEA: The higher the importing balance, the lesser the outward mobility rate. For graphical readability purpose, balance is computed as the absolute difference (incoming – outgoing students) divided by the total number of incoming students (when the balance is positive) or by the total number of outgoing students (in case of negative balance). This results in a smoother continuum, more readable when plotted than taking the ratio (incoming/outgoing) which is below 1 for most countries.

⁽⁷⁴⁾ Mobility for better learning. Mobility strategy 2020 for the European Higher Education Area (EHEA), p. 2.

Figure 5.6: Balance as a measure of the attractiveness of the education system of the country at tertiary education level (mobility flows within and outside EHEA), 2016/17



	LI	AD	LU	CY	MD	SK	AZ	BA	IS	AL	KZ	BG	GE	EE	LT
Balance	0.1	-0.8	-0.7	-0.6	-0.8	-0.7	-0.9	-0.5	-0.5	-0.9	-0.8	-0.5	-0.2	0.0	-0.4
Outward rate	86.8	79.8	74.5	41.2	19.2	18.3	14.6	14.1	13.6	11.6	10.1	9.6	8.4	8.3	7.9
	MK	MT	IE	RO	LV	NO	RS	CH	AM	HR	AT	EL	UA	HU	SI
Balance	-0.3	0.1	0.3	-0.2	0.1	-0.5	-0.2	0.7	-0.2	-0.5	0.7	-0.3	-0.4	0.6	-0.1
Outward rate	7.5	7.4	6.7	6.7	6.6	5.9	5.8	5.3	5.2	5.2	5.1	5.0	4.7	4.5	4.1
	PT	DE	CZ	IT	SE	FI	FR	BE	NL	ES	DK	UK	PL	RU	TR
Balance	0.4	0.5	0.7	0.3	0.4	0.6	0.7	0.7	0.8	0.4	0.8	0.9	0.6	0.8	0.6
Outward rate	4.1	4.1	4.0	4.0	3.9	3.8	3.6	2.9	2.2	2.0	1.8	1.7	1.6	0.7	0.6

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

The graph highlights interesting differences within the group of countries with very imbalanced importing or exporting mobility flows. More precisely, the United Kingdom, Denmark, and the Netherlands are situated on the right side of the X-axis with the highest imbalance (above 82 % each) and very low shares of outgoing mobile students (below 2.5 %). Austria and Switzerland, despite having high rates of incoming students, have an outward degree mobility rate that is significantly higher (around 5 %). Despite being much more importers than exporters, these two countries display an exporting flow above the general trend levels (considering the group of countries on the lower right side of the graph).

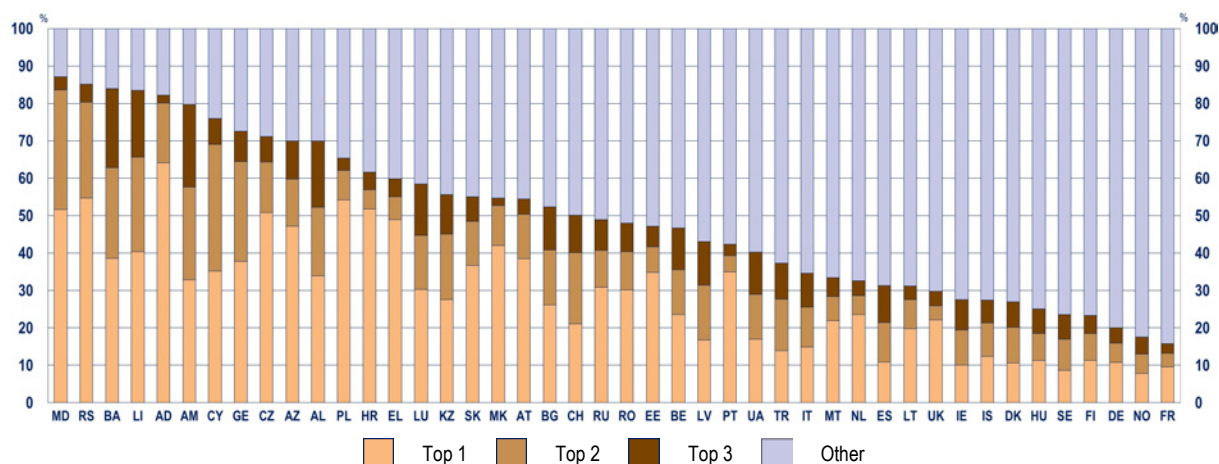
Those systems that are both attractive and also export significant numbers of students can therefore be considered as 'open systems' of the type envisaged in the 2012 Mobility Strategy ⁽⁷⁵⁾. For the moment, they are a minority within the EHEA area. The most 'balanced' country is Estonia with an outward rate of 8.3 %.

⁽⁷⁵⁾ Mobility for better learning. Mobility strategy 2020 for the European Higher Education Area (EHEA), p. 2.

Among countries with strongly imbalanced mobility flows, differences in the outward mobility rates are particularly evident. Andorra, Luxembourg and Cyprus are the highest net exporting countries in the EHEA. The next highest outward rates are found in Moldova and Slovakia, followed by Azerbaijan, Albania and Kazakhstan. Norway, Croatia, Ukraine and Greece also send out many more students than they receive (situated in the left side of the X axis with a balance below -30 %).

The indicator in Figure 5.7 denotes the number of incoming tertiary students enrolled in a given country from the top three countries of origin inside and outside EHEA, as a percentage of all incoming students enrolled in the country. Just like Figures 5.5 and 5.6, this indicator thus covers only degree mobile students. The purpose of this indicator is to provide an estimation of the diversity in the origin of mobile students who may come from different parts of the world. A high percentage indicates that the top country sends a significant amount of incoming students to the receiving country.

Figure 5.7: Student mobility flows: Top three countries of ORIGIN (INWARD) in %, 2017



	MD	RS	BA	LI	AD	AM	CY	GE	CZ	AZ	AL	PL	HR	EL	LU	KZ	SK	MK	AT	BG	CH	RU
Top 1 country	IL	BA	HR	AT	ES	RU	IN	IN	SK	TR	IT	UA	BA	CY	FR	UZ	CZ	TR	DE	EL	DE	KZ
Top 2 country	RO	ME	RS	DE	PT	GE	EL	AZ	RU	IR	RS	BY	SI	DE	DE	IN	UA	RS	IT	TR	FR	UZ
Top 3 country	TR	HR	TR	CH	FR	IN	BD	IQ	UA	RU	ME	IN	DE	AL	BE	KG	RS	AL	BA	UK	IT	TM
	RO	EE	BE	LV	PT	UA	TR	IT	MT	NL	ES	LT	UK	IE	IS	DK	HU	SE	FI	DE	NO	FR
Top 1 country	MD	FI	FR	UZ	BR	AZ	SY	CN	UK	DE	FR	BY	CN	CN	US	DE	DE	FI	RU	CN	SE	CN
Top 2 country	IL	RU	GI	DE	ES	TM	AZ	AL	IT	CN	IT	IN	HK	US	DE	NO	RO	CN	CN	IN	CN	IT
Top 3 country	FR	UA	NL	IN	FR	IN	TM	RO	KW	IT	EC	DE	IN	IN	UK	RO	RS	DE	NP	AT	DE	DE

%	MD	RS	BA	LI	AD	AM	CY	GE	CZ	AZ	AL	PL	HR	EL	LU	KZ	SK	MK	AT	BG	CH	RU
Percentage 1	51.7	54.8	38.6	40.4	64.1	32.8	35.2	37.8	50.8	47.2	33.9	54.3	51.8	48.9	30.2	27.6	36.7	42.1	38.5	26.1	21.1	30.8
Percentage 2	32.0	25.5	24.1	25.2	15.9	24.8	33.8	26.7	13.5	12.5	18.3	7.8	5.1	6.2	14.5	17.5	11.8	10.6	11.8	14.7	19.0	9.9
Percentage 3	3.5	4.9	21.2	17.9	2.2	22.2	6.9	8.1	6.8	10.3	17.8	3.3	4.7	4.8	13.7	10.5	6.6	2.1	4.1	11.6	10.0	8.3
Other	12.9	14.8	16.1	16.5	17.8	20.2	24.0	27.5	28.9	30.0	30.0	34.6	38.3	40.1	41.5	44.4	44.9	45.2	45.5	47.6	49.9	51.0
	RO	EE	BE	LV	PT	UA	TR	IT	MT	NL	ES	LT	UK	IE	IS	DK	HU	SE	FI	DE	NO	FR
Percentage 1	30.2	34.9	23.6	16.7	35.0	16.9	13.9	14.9	21.9	23.5	10.9	19.8	22.2	10.1	12.3	10.6	11.3	8.6	11.3	10.7	7.8	9.6
Percentage 2	10.2	6.8	11.9	14.7	4.3	12.1	13.8	10.6	6.4	5.1	10.6	7.7	3.8	9.3	8.9	9.5	7.2	8.3	7.2	5.2	5.2	3.7
Percentage 3	7.7	5.6	11.3	11.6	3.0	11.3	9.6	9.0	5.0	3.9	9.9	3.7	3.8	8.1	6.2	6.8	6.7	6.6	4.8	4.1	4.6	2.5
Other	52.0	52.8	53.2	56.9	57.6	59.7	62.7	65.5	66.6	67.4	68.6	68.8	70.3	72.5	72.5	73.1	74.9	76.5	76.7	80.0	82.4	84.3

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

The Nordic countries (Norway, Finland, Sweden, Denmark and Iceland,) as well as France, Germany Hungary, Ireland and the United Kingdom show the greatest diversity in geographical backgrounds of incoming mobile students. In these countries the top three destination countries represent a relatively low percentage of the total (less than 30 %).

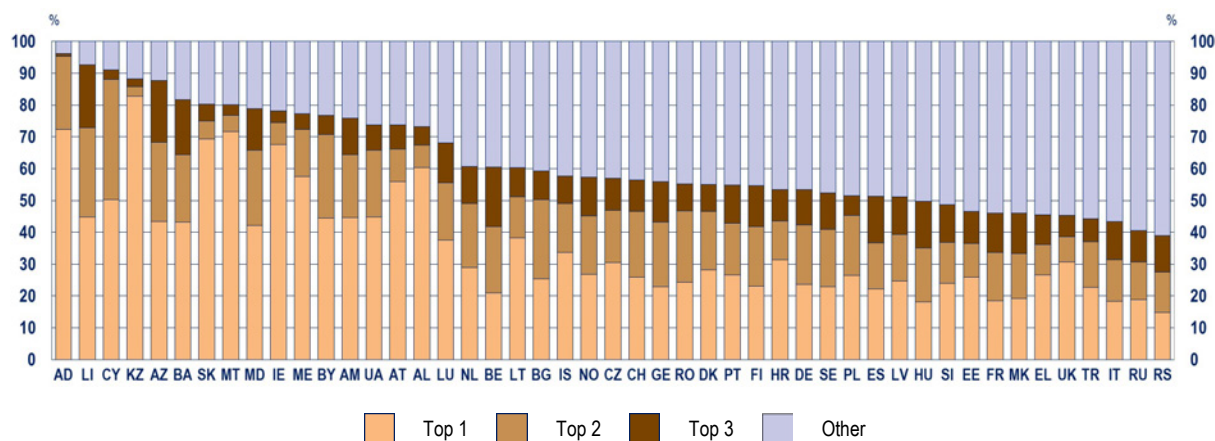
At the other end of the spectrum, in nearly one third of the analysed countries in 2017, the origin of students was not diverse, as more than 50 % of incoming students came from the top three countries.

In Moldova, Serbia, Bosnia and Herzegovina, Liechtenstein, Andorra and Armenia, the top three countries covered 80 % or more of the incoming students, while Cyprus, Georgia and Czechia also showed a high concentration of incoming students – each above 70 %. In the case of Czechia, which is among the countries with a high share of degree seeking mobile students (11.1 %), the top-ranking country (Slovakia) corresponds to roughly 6 % of its total student population. Similarly for Luxembourg, the 30 %-contribution from France accounts for 12 % of the country's student population.

Geographical proximity as well as the share of common language of instruction or cultural and historical legacies seem to be possible factors in determining the size of the incoming student population from particular countries. For instance, such factors may explain the pattern of students received in Estonia (from Finland, Russia and Ukraine), Luxembourg (from France, Germany and Belgium), Portugal (from Brazil, Spain and France) and Sweden (from Finland and Germany). Apart from the Swedish students in Norway, the big inward mobility flows in these countries as well as Finland and Germany come from China, while Germany also receives a significant number of students from India. Moreover, countries with high shares of incoming students from non-EHEA countries show overall more diversity regarding the origin of inward students (Sweden, Norway, France, the United Kingdom and Ireland).

Figure 5.8 shows the top three countries of destination, computing the number of mobile tertiary students of a given country of origin enrolled in the top three destination countries, as a percentage of all mobile tertiary students of that country. Again, this indicator considers degree mobility only. The variety of destinations is impacted by certain restrictions in the data collection of mobility beyond the EHEA. Only Australia, Brazil, Canada, Chile, Colombia, Japan, New Zealand and the United States are covered in the collection of data when it comes to outward degree mobility outside the EHEA. At national level, the various measures aimed at fostering student mobility also have an impact on the extent of diversity, since they usually prioritise particular geographical regions, sub-geographical areas or specific countries for privileged cooperation.

Figure 5.8: Student mobility flows: Top three countries of DESTINATION (OUTWARD) in %, 2016/17



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

	AD	LI	CY	KZ	AZ	BA	SK	MT	MD	IE	ME	BY	AM	UA	AT	AL	LU	NL	BE	LT	BG	IS	NO	CZ
Top 1	ES	AT	DE	RU	RU	AT	CZ	IE	IT	FR	AL	LT	DE	DE	CH	EL	BE	BE	FR	DK	DE	DK	DK	DE
Top 2	FR	CH	EL	TR	TR	HR	HU	NL	RO	UK	BA	PL	FR	PL	DE	IT	DE	UK	NL	NL	NL	UK	UK	SK
Top 3	UK	DE	UK	USA	UA	RS	UK	UK	RU	USA	RS	RU	RU	RU	UK	TR	FR	USA	UK	UK	UK	USA	USA	UK
	CH	GE	RO	DK	PT	FI	HR	DE	SE	PL	ES	LV	HU	SI	EE	FR	MK	EL	UK	TR	IT	RU	RS	
Top 1	DE	AM	FR	DE	ES	EE	AT	AT	DK	DE	FR	DE	AT	AT	DK	BE	BG	BG	DE	DE	AT	CZ	AT	
Top 2	FR	DE	IT	UK	FR	SE	BA	NL	UK	FR	UK	DK	DE	DE	FI	CAN	IT	CY	NL	UK	FR	DE	BA	
Top 3	UK	UA	UK	USA	UK	UK	IT	UK	USA	UK	USA	UK	UK	UK	UK	UK	TR	UK	USA	USA	UK	USA	HU	

Data Figure 5.8 (continued):

%	AD	LI	CY	KZ	AZ	BA	SK	MT	MD	IE	ME	BY	AM	UA	AT	AL	LU	NL	BE	LT	BG	IS	NO	CZ
Top1 %	72.4	44.9	50.2	82.9	43.3	43.2	69.3	71.7	42.1	67.7	57.5	44.5	44.5	44.8	56.0	60.4	37.5	28.9	20.9	38.2	25.3	33.7	26.8	30.6
Top2 %	22.8	28.0	37.9	2.9	24.9	21.2	5.8	5.1	23.6	6.7	14.9	26.2	19.9	21.0	10.1	7.0	18.2	20.1	20.9	13.0	25.0	15.4	18.3	16.3
Top3 %	1.0	19.9	3.1	2.5	19.5	17.2	5.2	3.4	13.1	3.8	5.0	6.0	11.4	7.9	7.6	5.8	12.4	11.8	18.7	9.0	9.1	8.5	12.1	10.0
Others %	3.8	7.3	8.9	11.8	12.2	18.4	19.7	19.8	21.1	21.8	22.6	23.2	24.2	26.2	26.8	32.0	39.2	39.4	39.7	40.6	42.4	42.7	43.1	
	CH	GE	RO	DK	PT	FI	HR	DE	SE	PL	ES	LV	HU	SI	EE	FR	MK	EL	UK	TR	IT	RU	RS	
Top1 %	25.9	22.9	24.3	28.2	26.6	23.1	31.3	23.6	22.9	26.4	22.2	24.7	18.1	23.9	25.9	18.5	19.3	26.6	30.6	22.8	18.4	18.9	14.8	
Top2 %	20.7	20.4	22.4	18.4	16.3	18.7	12.2	18.8	18.0	18.9	14.6	14.6	17.1	12.9	10.5	15.2	14.0	9.5	8.1	14.3	13.0	11.7	12.7	
Top3 %	9.8	12.8	8.5	8.4	12.1	12.8	9.9	11.0	11.4	6.3	14.5	11.9	14.6	11.9	10.1	12.3	12.7	9.4	6.7	7.3	12.0	10.0	11.4	
Others %	43.6	44.0	44.8	45.0	45.1	45.4	46.6	46.6	47.7	48.4	48.8	48.8	50.2	51.3	53.4	54.0	54.0	54.6	54.6	55.7	56.6	59.5	61.1	

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

Andorra, Liechtenstein and Cyprus show the least diverse outward mobility patterns. More than 90 % of outgoing students of those countries study in only three countries of destination. For Andorra, these countries are Spain, France and the United Kingdom, for Liechtenstein, they are Austria, Switzerland and Germany, while for Cyprus, it is Germany, Greece and the United Kingdom. Mobile students from France, North Macedonia, Italy, Serbia, Russia, Turkey, Greece and the United Kingdom spread wider as the top three destinations cover a maximum of 46 % of all outgoing students.

The United Kingdom receives by far the highest number of mobile students, and hence it is not surprising that it is a top destination for students from many other countries (in 30 out of 46). It reaches at least a percentage of 10 % of outward students in: the Netherlands (20 %), Belgium (19 %), Sweden (18 %), Norway (18 %), Denmark (18 %), Spain (15 %), Hungary (15 %), Iceland (15 %), Turkey (14 %), Finland (13 %), Portugal (12 %), Slovenia (12 %), Italy (12 %), France (12 %), Latvia (12 %), Germany (11 %) and Estonia (10 %). Germany is the most common destination for students from Cyprus (50 %), Armenia (45 %) and Ukraine (45 %). France and the United States are also among the top destination countries for degree mobile students.

In some cases, the mobility flows are not as heterogeneous. For instance, nearly 38 % of Cypriot mobile students go to Greece, which sends 49 % of its mobile students to Cyprus. Austria, the Netherlands and Switzerland receive 39 %, 24 % and 21 % respectively of German mobile students, while most students from Luxembourg, Montenegro and Liechtenstein move to neighbouring countries.

5.3. Qualitative data

5.3.1. Portability of public grants and publicly-subsidised loans

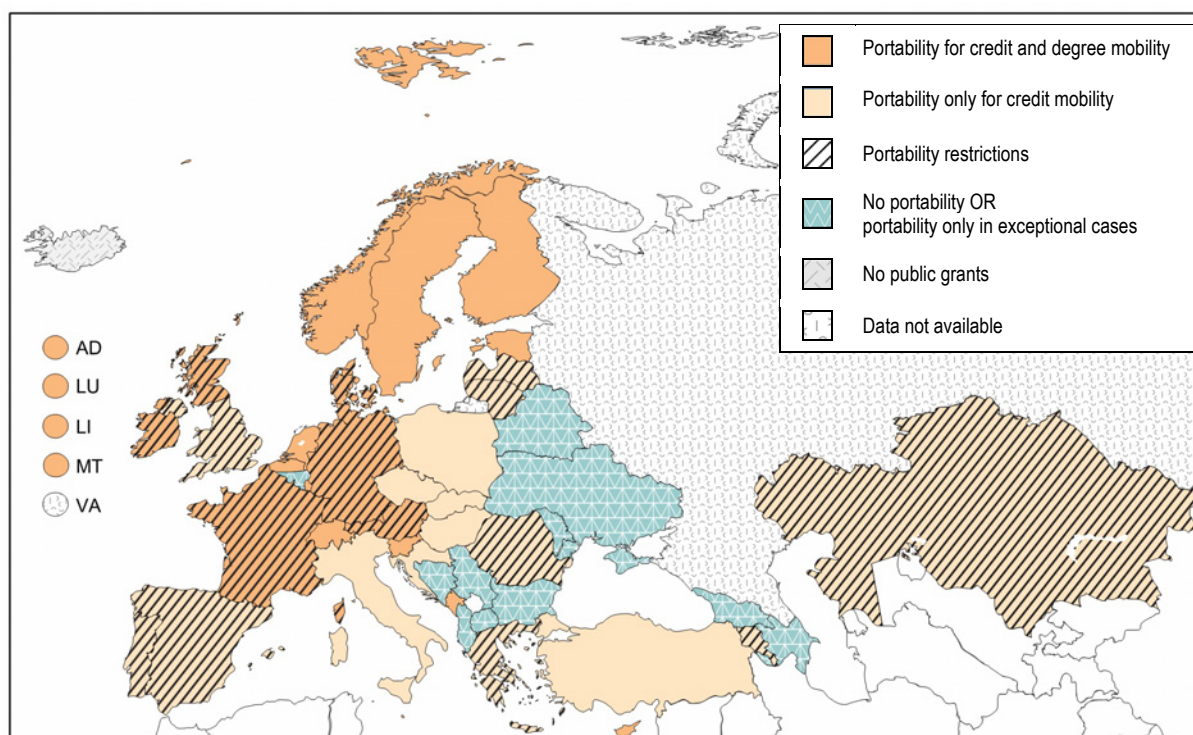
Lack of (sufficient) funding is often identified as a main obstacle to learning mobility, as the most recent Eurostudent survey report again demonstrates (DZHW, 2018, p. 25). One important aspect of mobility funding is the possibility for students to take domestic grants and/or loans to another EHEA system. This possibility – that is referred to as 'portability' – should ideally apply to both short-term study visits in the framework of a home-country programme (credit mobility) and entire-degree courses (degree mobility). The indicators that follow start by examining portability of domestic public grants and publicly-subsidised loans (see Figures 5.9 and 5.10). These two aspects are then brought together in Scorecard indicator n°12 on portability (see Figure 5.11).

Figure 5.9 shows the main characteristics of portability in the case of grants. It distinguishes between portability for short-term study visits which lead to credits in the framework of a home country programme (credit mobility) and portability for an entire degree course (degree mobility). Moreover, the figure provides details on portability restrictions, meaning additional requirements that students and/or the chosen study programme abroad need to fulfil for the grant to be portable. These include, for example, specifying the countries to which students can take their grants (e.g. portability within the European Economic Area only) or placing limits on the time spent abroad. The most severe restriction

is when students can only take their grants abroad to study if no equivalent programme is available in the home country. Since this means that portability is allowed only in exceptional cases, countries applying this condition are depicted in the same way as those having ‘no portability’.

The figure indicates that the most restrictive policies in terms of grant portability are found in Albania, Azerbaijan, Belarus, Bosnia and Herzegovina, Bulgaria, North Macedonia, Georgia, Serbia and Ukraine. In general, students from these countries cannot use their domestic grants when studying abroad, be it for a short period of time (credit mobility) or a longer period (degree mobility). The French Community of Belgium and Moldova also appear in the same category, as grants are portable only if there is no equivalent programme in the home system.

Figure 5.9: Portability of public grants, first and second cycle, 2018/19



Source: BFUG data collection.

Notes:

The figure covers domestic public grants, i.e. different types of grants issued by public authorities in the home country. It excludes public grants dedicated specifically to mobility.

The figure focuses on the portability of grants within the European Higher Education Area (EHEA).

When the category ‘portability for credit and degree mobility’ is combined with ‘portability restrictions’, it means that there are restrictions related either to both types of portability (i.e. credit **and** degree) or to one type only (i.e. credit **or** degree).

For around one third of all higher education systems considered, grant portability is limited to credit mobility, i.e. when students move abroad for a short period of time (e.g. a semester or an academic year) in the framework of their home-country programme. Some of these systems apply portability restrictions (Armenia, Greece, Kazakhstan, Latvia, Lithuania, Portugal, Romania, Spain and the United Kingdom – England, Wales and Northern Ireland), limiting, in particular, the portability of grants to programme exchanges within recognised schemes such as Erasmus+ (e.g. Greece, Latvia, Lithuania, Portugal, Spain and the United Kingdom – Wales and Northern Ireland). The same restrictions also apply to Scotland. However, this higher education system is not reported among those limiting portability of grants to credit mobility as it is conducting a degree portability pilot with a small group of selected institutions in the EU.

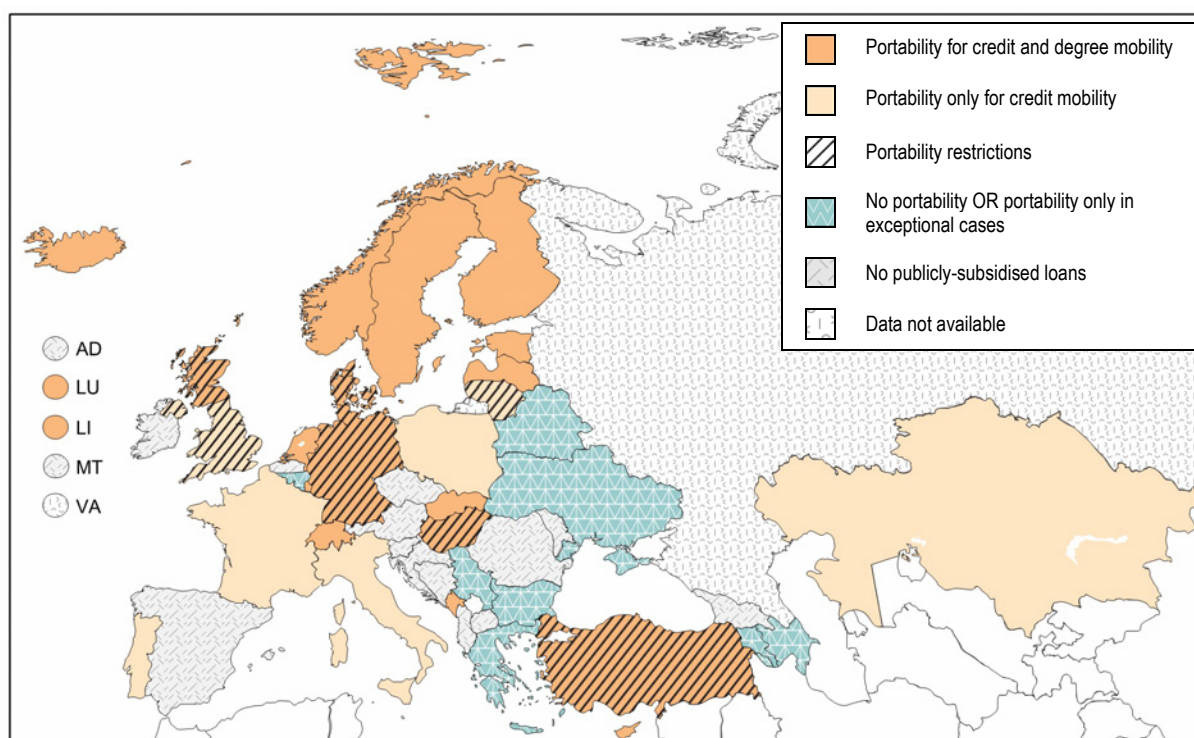
In 20 EHEA systems, grants are portable for both credit and degree mobility purposes. Six of these systems apply portability restrictions (Austria, Denmark, France, Germany, Ireland and the United

Kingdom – Scotland). For example, Germany limits degree portability to EU countries and to Switzerland, whereas the United Kingdom (Scotland) applies even stricter criteria, limiting its pilot degree portability scheme to a small number of selected higher education institutions in the EU. Ireland provides a further example of portability restrictions, limiting credit portability to mobility explicitly required by home country programmes, and portability for degree purposes to EU countries only.

Figure 5.10 examines whether publicly-subsidised loans are portable and, if so, whether there are any specific restrictions on portability. The information is structured similarly to the one on grants, in that it distinguishes between portability for credit and degree mobility, and identifies countries with portability restrictions.

The figure shows that publicly-subsidised loans are offered in only around two-thirds of all EHEA systems, and are thus less widespread than public grants. Moreover, as the higher education mobility scoreboard shows (European Commission/EACEA/Eurydice, 2020), some systems register only a negligible proportion of loan beneficiaries among their student population (e.g. up to 1 % in the French Community of Belgium, France, Italy, Slovakia and Switzerland), so that loans in these systems cannot be regarded as a major element of national student support (i.e. their portability is not considered in Scorecard indicator n°12 – Figure 5.11).

Figure 5.10: Portability of publicly-subsidised loans, first and second cycle, 2018/19



Source: BFUG data collection.

Notes:

The figure covers publicly-subsidised loans, i.e. different types of loans subsidised by public authorities in the home country. It excludes publicly-subsidised loans dedicated specifically to mobility.

The figure focuses on portability within the European Higher Education Area (EHEA).

When the category 'portability for credit and degree mobility' is combined with 'portability restrictions', it means that there are restrictions related either to both types of portability (i.e. credit **and** degree) or to one type only (i.e. credit **or** degree).

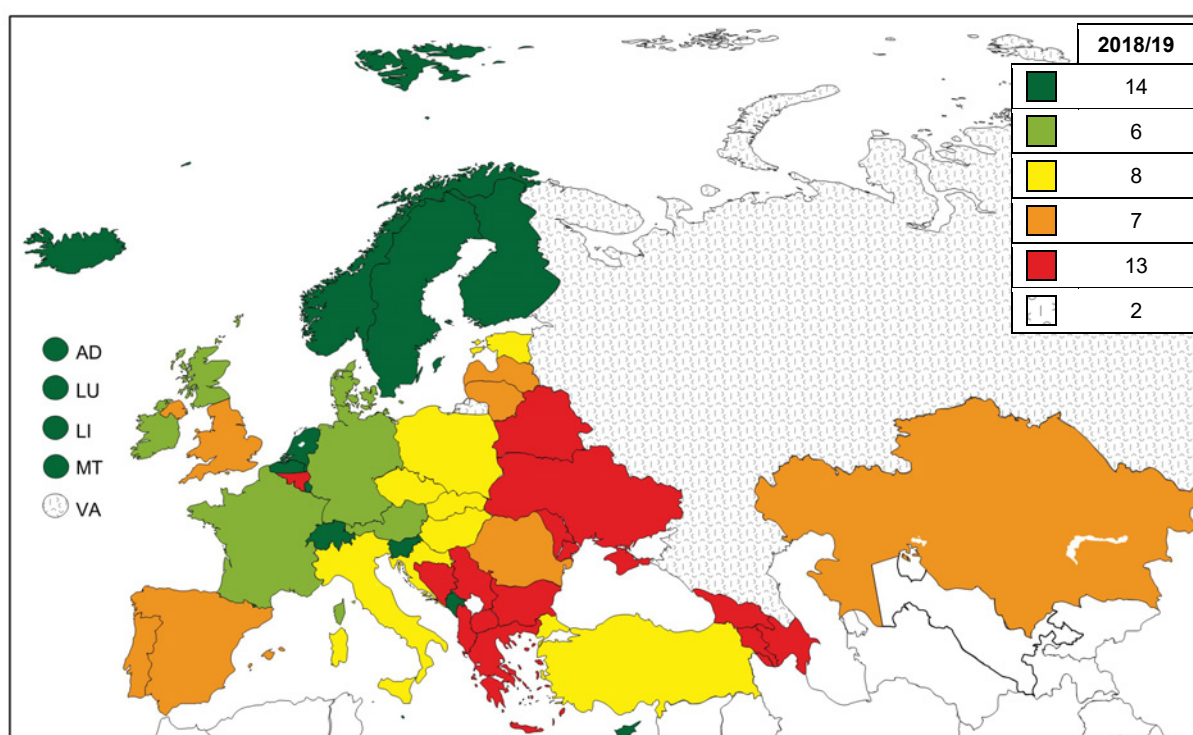
In general, countries that offer publicly-subsidised loans allow at least a certain level of portability. Exceptions to this pattern are Armenia, Azerbaijan, Belarus, Bulgaria, Greece, Serbia and Ukraine, where students cannot benefit from their loans if they study abroad, be it for credit or degree purposes. As with grants, the French Community of Belgium allows portability only in exceptional cases, when there is no equivalent programme within the Community.

Among systems where loans are portable, seven limit portability to credit mobility (France, Italy, Kazakhstan, Lithuania, Poland, Portugal and the United Kingdom – England, Wales and Northern Ireland) and, among these systems, some apply even stricter limitations. For example, in Lithuania and the United Kingdom (England, Wales and Northern Ireland), loans are only portable if the mobility experience falls under recognised exchange schemes such as Erasmus+.

Most systems that offer publicly-subsidised loans allow portability for both credit and degree mobility (with or without restrictions). While the overall geographical pattern is very similar to the portability of grants, some countries with limited grant portability – in particular Hungary, Latvia, Slovakia and Turkey – are more flexible when it comes to the portability of publicly-subsidised loans (i.e. loans are portable – with or without restrictions – for credit as well as degree mobility, whereas grants are only portable for credit mobility). Iceland is another noteworthy case, as although there is no standard grant package, publicly-subsidised loans are portable with no restrictions.







Scorecard indicator n°12 (Figure 5.11) brings together the elements presented in the two previous figures and puts countries' existing schemes into pre-defined categories.

**Figure 5.11: Scorecard indicator n°12:
Portability of public grants and publicly-subsidised loans, 2018/19**



Source: BFUG data collection.

Scorecard categories

	Full portability across the EHEA of all available domestic student support measures – grants and/or loans – for credit and degree mobility. Equivalent requirements for public grants and/or loans if students study in the home country or abroad.
	Portability of available domestic student support measures – grants and/or loans – for credit and degree mobility, but with some restrictions related to geography (country limitations), and/or types of programme, and/or field of study or time.
	Portability for credit mobility, without restrictions. No portability for degree mobility OR not all major support measures are portable for degree mobility.
	Portability for credit mobility but with some restrictions related to geography (country limitations), and/or types of programme, and/or field of study or time. No portability for degree mobility OR not all major support measures are portable for degree mobility.
	No portability: public grants and/or loans are only provided if students study in the home country or in exceptional cases (no equivalent programme is available in the home country).
	Not available

The indicator is based on a five-category colour-coded scheme where dark green represents full portability of all available domestic student support (this means that equivalent conditions apply to the awarding of public grants and/or provision of loans regardless of whether students intend to study in the home country or abroad). At the other end of the scale, the red category signifies no portability, or portability that is only permitted if no equivalent programme is available in the home country, i.e. domestic support is only portable in exceptional circumstances. There are three transitional categories between dark green and red. The first of them – light green – refers to systems where domestic support can be taken abroad for credit and degree mobility. However, some restrictions apply, e.g. portability only applies to certain defined countries or there are limits on the time spent abroad. The two other categories – yellow and orange – cover systems that limit the portability of all or most forms of domestic support to credit mobility, the distinguishing feature between the two categories being the presence or absence of portability restrictions.

In accordance with the above criteria, the indicator shows that unrestricted portability of all domestic support for credit as well as degree mobility ('dark green') exists only in fourteen EHEA systems. These are four Nordic systems (Finland, Iceland, Norway and Sweden), Andorra, Cyprus, the Flemish Community of Belgium, Liechtenstein, Luxembourg, Malta, Montenegro, the Netherlands, Slovenia and Switzerland. Some of these systems offer to their student population both grants and loans (nine systems), whereas in other instances, there is only one type of public support, i.e. either public grants (Andorra, the Flemish Community of Belgium, Malta and Slovenia) or publicly-subsidised loans (Iceland).

In six higher education systems (Austria, Denmark, France, Germany, Ireland and the United Kingdom – Scotland), all major support schemes are portable for credit as well as degree mobility; yet, there are various portability restrictions ('light green'). As discussed previously, these are mainly related to geography (i.e. mobility only towards certain countries).

A further eight systems (Croatia, Czechia, Estonia, Hungary, Italy, Poland, Slovakia and Turkey) limit the portability of their domestic support to credit mobility only, generally with no restrictions ('yellow'). It is noteworthy that three of these systems (Hungary, Slovakia and Turkey) provide publicly-subsidised loans that are portable for both credit as well as degree mobility. However, grants are only portable for credit mobility experiences. The flexibility is even higher in Estonia, where loans as well as two grant schemes (need-based study allowance and scholarships for students with special needs) are fully portable, but the portability of other grants is limited to credit mobility.

Seven countries (Kazakhstan, Latvia, Lithuania, Portugal, Romania, Spain and most parts of the United Kingdom) apply various restrictions to credit mobility ('orange'). Among them, Latvia offers fully portable loans; yet, the portability of grants is limited to credit mobility with restrictions. Kazakhstan provides loans that are portable for credit mobility without restrictions, while grants are portable for credit mobility with restrictions.

Finally, 13 higher education systems (Albania, Armenia, Azerbaijan, the French Community of Belgium, Belarus, Bosnia and Herzegovina, Bulgaria, Georgia, Greece, North Macedonia, Moldova, Serbia and Ukraine) provide domestic support with no portability or allow portability only under exceptional circumstances, such as when there is no equivalent programme in the home system. ('red'). Armenia and Greece have a unique position in this group, as grants are portable for credit mobility (with restrictions), but loans are not.

Overall the analysis suggests that, in less than half of all European higher education systems, domestic financial support is portable for credit as well as degree mobility (though some restrictions may apply). Moreover, the data point to a rather clear geographical pattern, in particular a contrast between northern and north-western Europe with a high degree of portability, and eastern Europe with low to non-existent portability.

5.3.2. Supporting the mobility of students from disadvantaged groups

Not all students have equal access to learning mobility opportunities. Evidence shows that students from low socio-economic backgrounds and students with disabilities are less likely to participate in such programmes (DZHW, 2018; European Commission, 2019). Disadvantaged students therefore miss out on the benefits conferred by these experiences, further deepening the divide with their peers.

In order to improve the current situation, the Bologna Process highlights the important place of learning mobility within the social dimension of higher education, calling for the increasing participation of students from disadvantaged backgrounds in international mobility ⁽⁷⁶⁾.

Following the above, this section examines support provided to disadvantaged learners. Four main aspects of top-level support are considered:

1. long-term quantitative policy objectives on the mobility participation of disadvantaged students in mobility programmes;
2. comprehensive monitoring of the participation of disadvantaged students in mobility programmes;
3. financial support in the form of public grants provided to disadvantaged students to participate in mobility programmes (without taking into account the proportion of students receiving support and the amount they get); and
4. recommendations/incentives provided to higher education institutions to implement targeted measures supporting the participation of disadvantaged students in mobility programmes.

These aspects are discussed in turn.

Quantitative policy objectives are understood as numerical targets set by top-level authorities for the proportion of disadvantaged students participating in learning mobility. The setting of such objectives signals a strong political commitment towards increasing the participation of disadvantaged students in learning mobility programmes.

Some EHEA countries have in place short-term quantitative policy objectives related to mobility of disadvantaged students. In particular, national Erasmus+ agencies might set year-by-year targets on the participation of disadvantaged learners. Examples of such short-term objectives can be found in Greece (in 2019, 5.5 % of Erasmus+ students should be students with special needs) and France (in 2018, 30 % of Erasmus+ students should have come from low socio-economic backgrounds). These short-term objectives are not considered in Scorecard indicator n°13.

So far, only a limited number of EHEA systems (Austria, the Flemish Community of Belgium, France and Slovenia) have in place long-term quantitative policy objectives related to mobility of disadvantaged students. More specifically, by 2025, Austria aims to increase learning mobility programmes of students whose parents do not have higher education qualifications to at least 18 % (Bundesministerium für Wissenschaft, Forschung und Wirtschaft, 2017, p. 32). The Flemish Community of Belgium is aiming for 33 % of mobile students to come from disadvantaged groups by 2020 (Vlaams Ministerie van Onderwijs en Vorming, 2013, p. 64). In France, the French National Strategy for Higher Education puts forward a proposal to double student mobility (including the share of students with low socio-economic background) by 2025, in particular thanks to a specific mobility grant for disadvantaged students (Ministère de l'éducation nationale, de l'enseignement supérieur et de la recherche, 2015, p. 18) In Slovenia, by 2020, 10-15 % of all Erasmus+ students should come from a disadvantaged background (Government of the Republic of Slovenia, 2016, p. 2).

⁽⁷⁶⁾ See, for example, the Yerevan Communiqué, adopted at the EHEA Ministerial Conference in Yerevan, 14-15 May 2015, pp. 2-3.

Monitoring relevant characteristics of the student population participating in mobility allows policy-makers to obtain information on whether different groups of students can – and do – participate proportionally in mobility programmes. Such information is important for being able to design and provide adequate support for students from disadvantaged backgrounds.

Comprehensive monitoring practices – i.e. those seeking to provide a comprehensive picture of the participation of disadvantaged students across all major mobility programmes – are not widespread across the EHEA. Some EHEA countries monitor the participation of students from disadvantaged groups in some specific mobility programmes, but not in all of them. Such partial monitoring is not considered under Scorecard indicator n°13. Moreover, the indicator does not consider the compulsory Erasmus+ monitoring for countries participating in the Erasmus+ programme. Only six countries, corresponding to eight EHEA systems (Austria, Belgium – the French and Flemish Communities, France, Germany, Italy and the systems in the United Kingdom), have in place such monitoring mechanisms. However, these monitoring systems vary in the way information is collected:

- In the French and Flemish Communities of Belgium and France, data on students participating in mobility programmes are collected by the ministries of education. In the Flemish Community of Belgium, the Ministry of Education and Training has a central database for higher education which contains all data on mobility, including information on students' socio-economic background or disability.
- In Germany and Austria, student surveys are conducted every three to four years ⁽⁷⁷⁾.
- In Italy and the United Kingdom, information on these students is included in the annual data collection of statistical offices. In Italy, the statistical office collects data on the mobility of students, distinguishing between grant holders and non-grant holders. Given that grants are awarded on need-based criteria, this provides information on students by socio-economic background. In the United Kingdom, the Higher Education Statistics Agency collects data on students participating in learning mobility by ethnicity, socio-economic background and gender ⁽⁷⁸⁾.

Financial support is essential if disadvantaged students are to participate in international mobility. Given the financial difficulties of students from low socio-economic backgrounds, or the extra financial burden facing students with disabilities, the learning mobility support considered here is restricted to non-repayable forms of public support: public grants. Two main models of this type of provision exist in Europe.

In the first model, disadvantaged students receive *targeted support* that is available only to them. This can take the form of either specific learning mobility grants, or need-based domestic grants that are portable, at least for credit mobility. The second model is based on the so-called *mainstreaming approach*. According to this model, countries provide portable grants to the majority (more than 50 %) of students. In this case, disadvantaged students are not targeted specifically (though the amount awarded might be determined on need-based criteria), but their support is ensured by the holistic approach towards grant provision. In other words, the logic behind this approach is that if all (or at least the majority of) students receive grants, grant provision is 'mainstream' and, consequently, the support of those in need is ensured without them being specifically targeted by education authorities.

The overwhelming majority of EHEA systems use the first model of financial support for disadvantaged students, i.e. the targeted approach. More specifically, around half of all EHEA systems have in place portable domestic need-based grants, whereas in around one third of the systems, there are specific mobility grants for disadvantaged students. These two approaches are often combined, meaning that

⁽⁷⁷⁾ See the Social Survey website <http://www.sozialerhebung.de/sozialerhebung/documents/englisch> for Germany, and the survey results at <http://www.sozialerhebung.at/index.php/en/> for Austria.

⁽⁷⁸⁾ For details, see the 'Go International' website: <http://go.international.ac.uk/student-profiles-and-identities>

a number of systems offer both portable domestic need-based grants and specific mobility grants for the disadvantaged. A small number of countries have in place the mainstreaming approach, i.e. grants for more than 50 % of students (namely Denmark, Finland, Luxembourg, Malta, Norway, Sweden and the United Kingdom – Wales and Northern Ireland). The mainstream grants are sometimes provided alongside targeted (need-based) grants. In Norway, while only 49 % of students receive grants in the first cycle, 55 % do so in the second. Therefore, on the basis of information provided for the two cycles, the country is included in the group providing mainstream grants.

Twelve higher education systems, situated predominantly in southeastern part of the EHEA (Albania, Azerbaijan, Belarus, Bosnia and Herzegovina, Bulgaria, Iceland, Moldova, Montenegro, North Macedonia, Russia, Serbia and Ukraine) offer neither targeted mobility grants, nor portable need-based grants. Grants that exist in these countries are either portable, but primarily merit-based, or not portable, irrespective of the awarding criteria (see the previous section). There are no public grants in Iceland.

Finally, **top-level recommendations** on how to provide support for the participation of students from disadvantaged groups in mobility programmes can provide important incentives to higher education institutions to implement targeted measures. In addition, top-level authorities may also decide to introduce performance-based funding or other financial **incentives** linked to the mobility participation of disadvantaged learners.

Top-level recommendations and/or incentives to higher education institutions to implement targeted measures supporting the mobility participation of disadvantaged students exist in eight EHEA systems: Austria, the Flemish Community of Belgium, France, Greece, Italy, Kazakhstan, Slovenia and Turkey.

Some of these recommendations concern only the participation of students with disabilities in mobility programmes. Three education systems have prepared handbooks or guidelines for higher education institutions on the special provisions made for students with disabilities with regard to learning mobility applications. For example, the 2015 Handbook of the Flemish Community of Belgium on study and internships abroad includes one chapter dedicated to students with disabilities. A similar Handbook was also prepared by the Turkish National Agency in 2018, outlining the preferential treatment to be given to students with disabilities applying for places on learning mobility programmes. In Greece, the National Erasmus+ Agency instructs higher education institutions to give priority to students with special needs as long as they fulfil the selection criteria, and it has published leaflets in braille for distribution to Greek higher education institutions.

A more general approach towards improving the participation of disadvantaged learners in mobility programmes is taken in other education systems. Conferences and publicity campaigns are used (in the Flemish Community of Belgium), as are ministry circulars (in France) or ministerial recommendations (Kazakhstan). Two education systems (Austria and Slovenia) include specific provisions in learning mobility strategies. In Austria, the 2016 Higher Education Mobility Strategy includes recommendations on the development and implementation of targeted measures for improving the participation of under-represented groups in learning mobility. This is also supported by the 2017 National Strategy on the social dimension in higher education. In Slovenia, the Strategy for the Internationalisation of Slovenian Higher Education includes provisions for promoting the participation of disadvantaged learners in mobility programmes.

Finally, financial incentives exist in Italy, where the proportion of disadvantaged students and students participating in learning mobility programmes are taken into account in the funding awarded to higher education institutions.

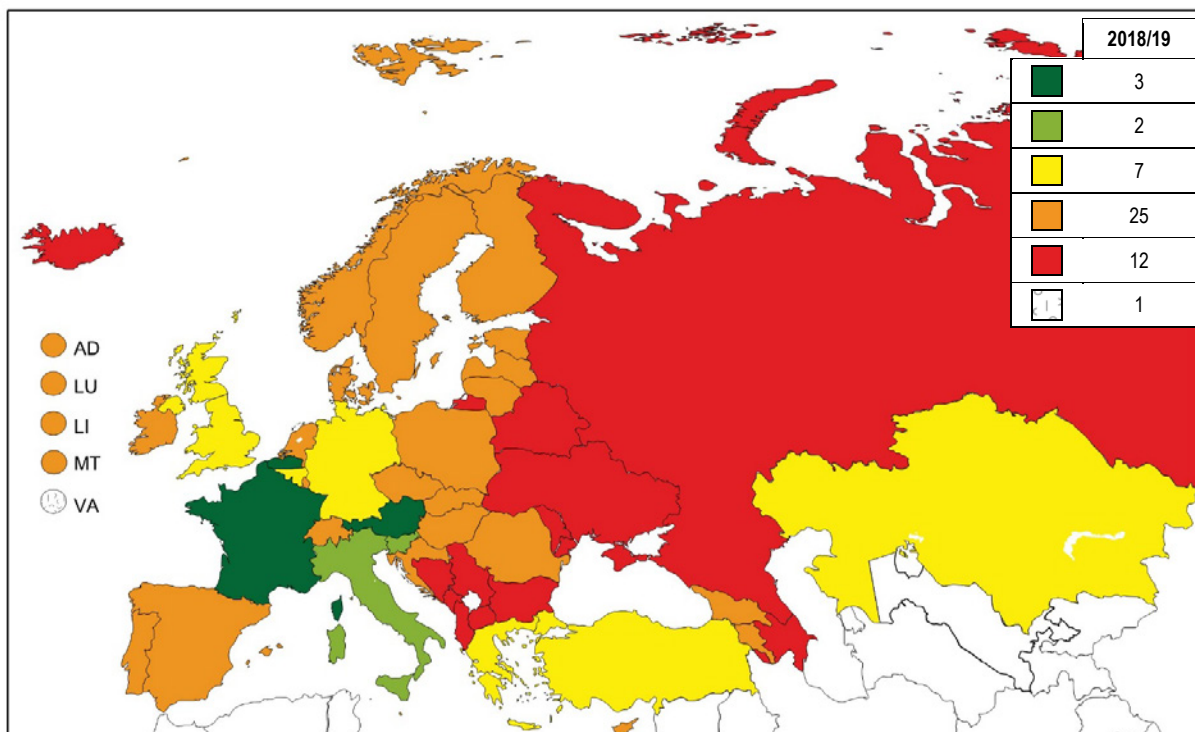
Scorecard indicator n°13 depicted on Figure 5.12 summarises the measures supporting the mobility of students from disadvantaged groups. The indicator applies the five-colour scheme from 'dark green' to 'red'. A country should have the following four elements of mobility support in place to be in the 'dark green' category:

1. long-term top-level quantitative policy objectives regarding the participation of disadvantaged students in mobility programmes;
2. comprehensive monitoring of the participation of disadvantaged students in mobility programmes;
3. financial support provided to disadvantaged students, either based on the targeting or the mainstreaming model; and
4. top-level recommendations and/or incentives to higher education institutions to implement targeted measures supporting the mobility participation of disadvantaged students.

Education systems with three elements in place are in the 'light green', those with two elements in the 'yellow', and with one element in the 'orange' category. Education systems with no support measures for disadvantaged learners identified by this indicator are placed in the 'red' category.







Most elements of the scoreboard indicator require a specific focus on disadvantaged learners. While general policy measures may also enhance the participation of these groups of students in learning mobility (hence the inclusion of mainstream grants among financial support measures), given the vulnerable position of students from under-represented groups, this indicator aims to capture the presence of targeted policies in the education systems under analysis.

**Figure 5.12: Scorecard indicator n°13:
Supporting the mobility of students from disadvantaged groups, 2018/19**



Source: BFUG data collection.

Scorecard categories

	The following measures are undertaken to increase the participation of disadvantaged learners in learning mobility: <ul style="list-style-type: none"> • Long-term quantitative objectives on the participation of disadvantaged learners; • Comprehensive monitoring of the participation of disadvantaged learners in mobility programmes; • Financial support in the form of: <ul style="list-style-type: none"> ◦ Targeted specific mobility grants OR ◦ Portable need-based grants OR ◦ Mainstream portable grants provided to more than 50 % of students; • Top-level recommendations/incentives to HEIs to implement targeted measures supporting the participation of disadvantaged students in mobility programmes.
	Three out of the four types of measures are undertaken.
	Two out of the four types of measures are undertaken.
	One out of the four types of measures is undertaken.
	None of the four types of measures are undertaken.
	Not available

The figure illustrates that comprehensive mobility support targeting disadvantaged learners is very rare. There are only three EHEA systems in the 'dark green' category (Austria, the Flemish Community of Belgium and France) and two in the 'light green' (Italy and Slovenia).

A further seven higher education systems in six countries (the French Community of Belgium, Germany, Greece, Kazakhstan, Turkey and the United Kingdom) have two out of the four measures in place ('yellow'). In the French Community of Belgium, Germany and the United Kingdom, in addition to targeted financial support, comprehensive monitoring systems have been established; while in Greece, Kazakhstan and Turkey, financial support is complemented by top-level recommendations to higher education institutions.

More than half of all EHEA systems (25) are marked in 'orange'. They provide financial learning mobility support to disadvantaged students, but they neither monitor the effect of this financial support on the participation of disadvantaged learners nor take any steps to encourage higher education institutions to promote the participation of students from under-represented groups in learning mobility programmes.

Finally, 12 EHEA systems do not support the participation of disadvantaged students in learning mobility by any of the means described above.

5.4. Conclusions

The Bologna Process has not only been a catalyst for structural reforms and the development of quality assurance systems, but has also stimulated greater mobility and internationalisation. Despite problems in measuring the different forms of student mobility, it is clear that international student mobility has grown considerably during the past two decades.

Nevertheless the target of 20 % of graduates experiencing mobility by 2020 has not been met with the overall weighted average for the EHEA standing at 9.4 %. Indeed with hindsight it seems that this target was set somewhat blindly, as countries were unaware of the actual reality of student mobility in 2009, and insufficient account was taken of general increases in student numbers. This meant that very significant increases in actual numbers of mobile students would be required to increase the overall percentage of mobile students. Nevertheless, it is noteworthy that if only ISCED levels 7 and 8 (master and doctoral level) were considered, the EHEA as a whole would now be close to the 20 % target.

Although the setting of the 20 % mobility target lacked thorough consideration of relevant contextual factors, it did nevertheless have important positive consequences for the support and development of student mobility in the EHEA context. It created new momentum for international student mobility, by repositioning it at the top of the ministerial agenda. It also gave a significant push to improving the international data collections on mobility in general, and on credit mobility in particular.

Even though it is impossible to prove causality, the focus throughout the Bologna Process on improving recognition, ECTS, Diploma Supplement and portability of student support are likely to have facilitated both credit and degree mobility. Moreover the introduction of a common three cycle degree system has made it much easier to study one cycle in one country and another in a different country. Nowadays the majority of degree-mobile students in the EHEA – both from outside and from within the EHEA – are studying at master level. The Bologna three-cycle system also underpins the success of joint international master programmes as developed within the Erasmus Mundus programme.

As well as developing and adopting an arsenal of instruments to boost mobility, the Bologna Process has also been a voice for inclusive mobility. In particular, it has drawn attention to the need for the less advantaged part of the student body also to have the opportunity to benefit from mobility. Despite giving voice to this issue, there remains a lot more to do to target support to disadvantaged students in order to make inclusive mobility a reality.

Some aspects of internationalisation have grown in importance throughout the Bologna period and merit greater attention in the future. English-medium instruction has developed rapidly with significant cultural, educational and linguistic consequences. 'Internationalisation at home' is also a notion that, although already present for a considerable period, could become more significant in the coming years – particularly in light of recent developments in blended learning. Transnational education, which has marked the practice and discourse of internationalisation in the last two decades, could also be further explored in the context of EHEA developments.

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