

Study on balanced and inclusive learning mobility in the context of the European Education Area and the new higher education mobility target

Final Report

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Glossary of terms

Term	Definition ¹
Blended, virtual and hybrid mobility	Blended mobility is a learning mobility activity that combines a short physical mobility period abroad with a mandatory virtual mobility (fully remote, typically online) component, before, during, or after the physical stay. Virtual mobility, where the teaching is provided by foreign-based institutions, is not counted for international degree mobility statistics, or is reported separately. They are not to be confused with hybrid mobility, where both in-person students and virtual students attend the same course or activity.
Credit mobility	Temporary tertiary education and/or study-related traineeship abroad within the framework of enrolment in a tertiary education programme at a home institution (usually) for the purpose of gaining academic credit. Credit mobile students are excluded from the enrolment statistics of the host country and reported instead in the country of original enrolment.
Credit mobile graduates	Graduates who, throughout their tertiary education programme, have undertaken credit mobility. Statistics on these graduates refer to their year of graduation, not the year in which their credit mobility took place. Eurostat statistics differentiate if the credit mobility had a duration of at least 3 months (or a minimum of 15 ECTS points) or not.
Degree mobility / Internationally mobile student	Degree-mobile students (terminology used by Eurostat) are enrolled as regular students in a programme taught in the country of destination (different from their country of origin) with the intention of graduating there. The country of origin of a tertiary student is the country in which they gained their upper secondary qualification. This can also be referred to as the country of prior education. They are sometimes simply referred to as mobile students (unless explicitly referring to credit mobility) or internationally mobile students (the term used by UIS). This should not be confused with the term “foreign students”, which is based on student citizenship, regardless of the country of prior education. Any transfer between different education systems which does not involve the physical crossing of an international border is not considered as international student mobility. As such, fully virtual (distance) mobility, or programmes offered by a foreign-based institution in the country of origin leading to foreign degrees, are not reported under this category. ²
ISCED	The International Standard Classification of Education is the basis for the statistical definitions of education levels. The tertiary education ISCED levels are: ISCED 5 – Short-cycle tertiary education programmes; ISCED 6 – bachelor-level equivalent programmes; ISCED 7 – master-level equivalent programmes; ISCED 8 – PhD level programmes.
Incoming or inbound student mobility / outgoing or outbound student mobility	International students that enrol in a country, either temporarily (credit mobility) or to pursue a degree (degree mobility), are considered inbound students by that country. Under the UOE methodology, internationally mobile students are recorded by the country in which they are enrolled. For degree mobility, this is the country of destination, which counts these students as inbound; their country of origin does not collect the data directly and must derive outbound figures from destination-country statistics. For credit mobility - temporary study abroad of at least three months in which the student remains enrolled at their home institution - reporting falls to the home country, since that is where enrolment is maintained.
Learning mobility	Going abroad for study or training purposes. This may be done by students or by staff, though this report focuses exclusively on student mobility. Eurostat differentiates credit mobilities with the purpose of studying, doing a work placement (traineeship, apprenticeship) or studying and undergoing a work placement that is part of the study programme. In the context of the Erasmus+ programme, learning mobility can be in-person, online, blended (partly in-person and partly online) or hybrid (see definition above).
Tertiary education	In statistical terms, it comprises four ISCED levels, ISCED 5 to 8, of which only levels 6 to 8 are traditionally referred to as higher education.

¹ When available, these definitions are based on the joint UNESCO-UIS / OECD / EUROSTAT Manual on Concepts, Definitions, and Classifications (2025 edition).

² UNESCO Institute for Statistics. Statistics. (2026). Glossary.

Executive Summary

I. Degree Mobility: Patterns, Impacts and Drivers of Imbalance

What is 'balanced' degree mobility?

The concept of balanced degree mobility has long featured in EU and EHEA policy, from the 2007 London Communiqué to the 2024 Council Recommendation *Europe on the Move*. Yet this study finds that **no EU or EEA³ country has formally defined balanced mobility**, and that treating balance as numerical parity is both analytically insufficient and often fails to address the various consequences of the brain circulation phenomenon.

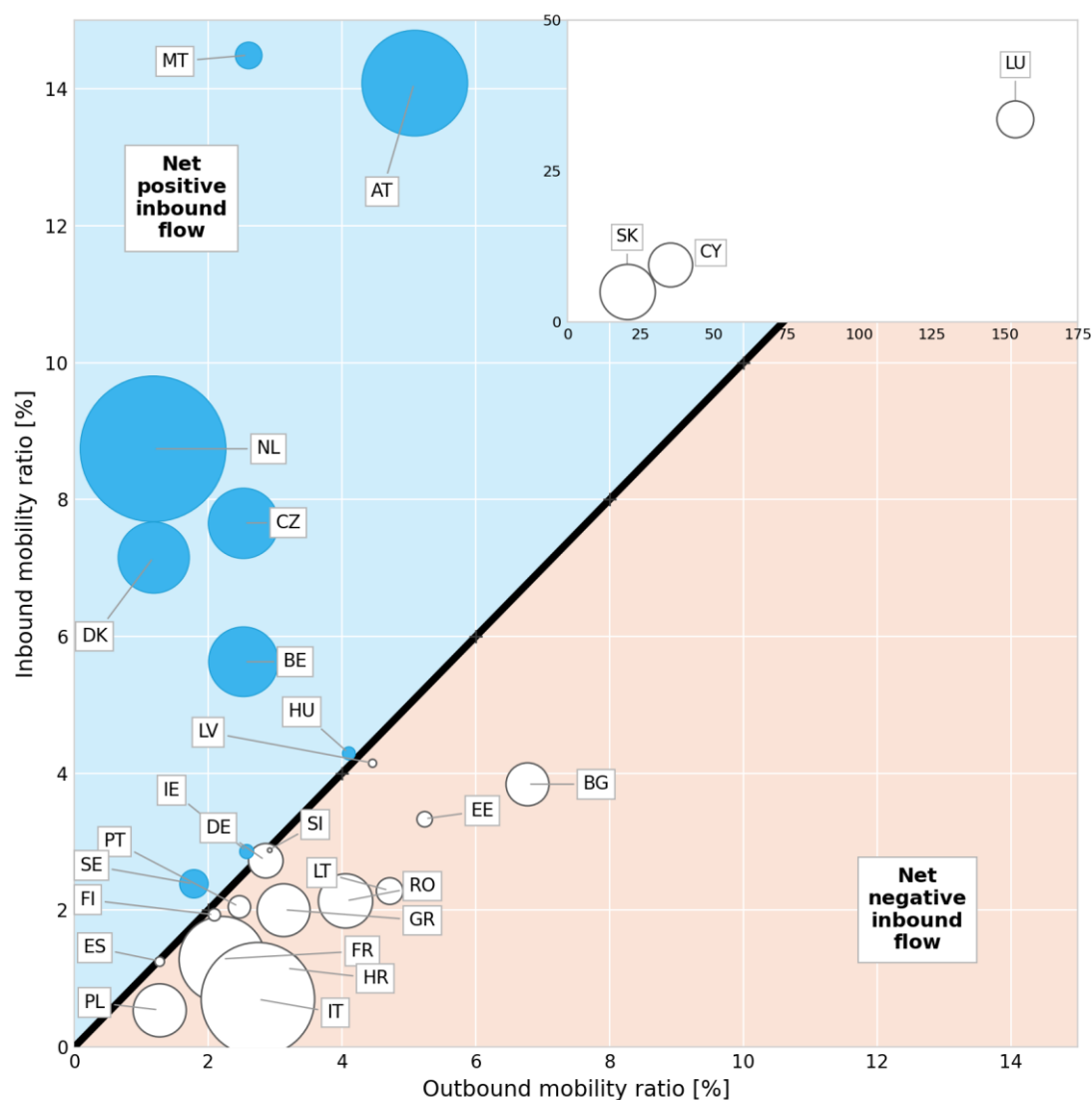
Balanced mobility is best understood as an impact-oriented policy objective: a condition in which the costs and benefits of degree mobility are shared in a sustainable and mutually beneficial way by host countries, sending countries and students - not simply a question of whether inflows and outflows are numerically equal. The same mobility flow can appear balanced from an EU-wide perspective while generating significant asymmetries for individual Member States. Any meaningful definition must factor in fiscal effects, graduate retention, labour market outcomes, demographic dynamics and institutional capacity, disaggregated by country, field, education level and student background.

Trends and patterns in intra-EU degree mobility

Internationally mobile students represented 8.9% of all EU27 tertiary students in 2023, compared to 7.2% in 2016. Over the same period, the absolute number of internationally mobile students increased by 32%. This growth has been driven almost entirely by non-EU students; the share of intra-EU mobile students in total enrolment has remained stable throughout the period and was not significantly disrupted by COVID-19.

³ In this report, EEA refers to the European Economic Area (EU Member States plus Iceland, Liechtenstein and Norway), unless otherwise specified.

Figure 1: Intra-EU net inbound degree mobility flow (area), inbound mobility rate (%), outbound mobility ratio (%), tertiary education, by country (2023).



Note: Both axes show rates - incoming (vertical) and outgoing (horizontal) degree-mobile students as a share (%) of all tertiary students (ISCED 5–8) enrolled in the country, so countries above the diagonal are net receivers and those below are net senders. The circle area instead shows the net flow in absolute terms - the number of students by which intra-EU/EEA inflows exceed or fall short of outflows - so a large circle means a large net headcount.

Source: Prepared by study team, Eurostat data (2023):

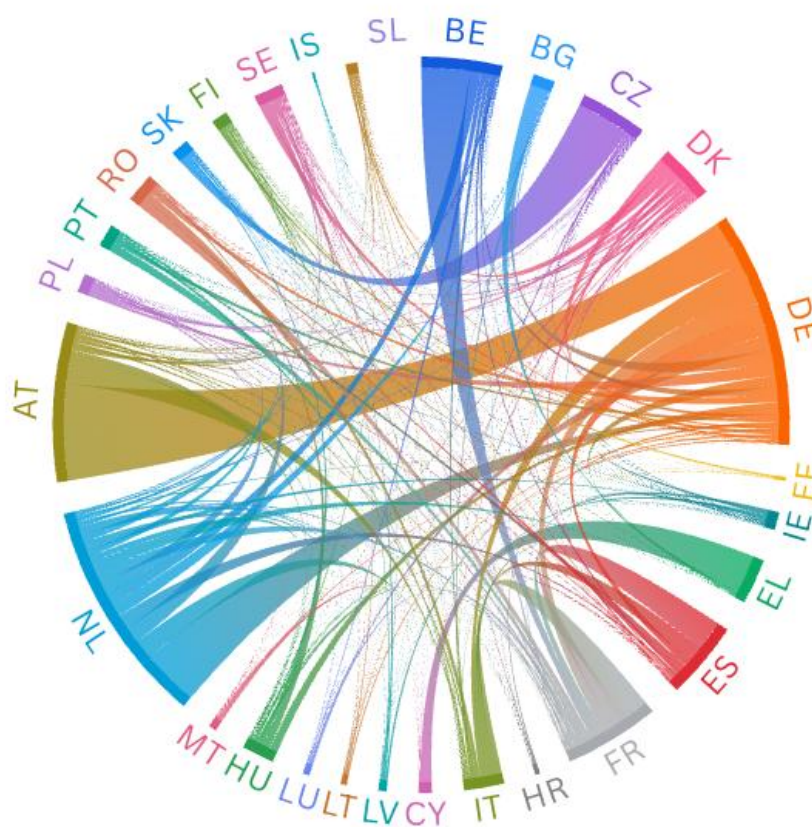
https://doi.org/10.2908/EDUC_UOE_MOBS02 and

https://doi.org/10.2908/EDUC_UOE_ENRT01

Despite the overall growth in mobility, participation is distributed very unevenly across Member States. As illustrated by the figure above, intra-EU degree mobility flows are **structurally asymmetric**: a small group of countries combines relatively low outward mobility with high levels of inbound degree mobility, while others experience the opposite pattern, acting primarily as sending countries. Belgium, the Netherlands, Denmark, Austria, Czechia and Malta are consistent

net receivers; France, Italy, Croatia, Luxembourg, Slovakia and Cyprus are net senders. Many of the dominant bilateral flows are explained by a combination of geographical proximity, shared language of instruction, and free or subsidised tuition: 62% of degree-mobile students in Belgium come from France, 62% of those in Austria from Germany, and 83% of those in Czechia from Slovakia. The Netherlands attracts 8 intra-EU students for every Dutch student going abroad; Denmark and Czechia each receive 5.6 for everyone they send. These asymmetries are not isolated to a handful of countries but reflect a broader network structure of intra-EU mobility. Figure below illustrates the intensity of bilateral degree mobility flows across the EU/EEA, highlighting the concentration of student movements between specific country pairs and the central role played by a relatively small number of major destination countries.

Figure 2: Bilateral flows of degree mobile students (from EU/EEA countries to EU/EEA countries), ISCED 5-8 (2023).



Source: Eurostat, [educ_uoe_mobs02](#) (2023). Figure by study team.

Notes: The width of the lines represents the combined number of students going in both directions for any combination of two countries. Individual country-to-country flow numbers (including in each of the two directions separately) can be consulted via an interactive online version of the figure [\[click here\]](#).

Mobility intensity rises sharply with education level: from 2.7% of enrolment at short-cycle level to 23.3% at doctoral level.

How do different actors perceive imbalance - and what challenges do they identify?

The study identifies two main national positions on degree mobility imbalance. A first group of **net receiving countries - the Netherlands, Denmark, Austria and the French Community of Belgium** - frames imbalance in terms of fiscal pressure (EU students accessing publicly funded systems without commensurate return), housing shortages, and workforce instability when graduates do not remain. Austria and the French Community of Belgium has pursued caps on enrolment in regulated professions such as medicine, having demonstrated to the European Court of Justice that high inflows risk depleting domestic professional supply.

A second group of **net sending countries – Bulgaria, Croatia, Greece, Romania and Slovakia** – emphasises brain drain: a substantial share of outgoing degree-mobile graduates do not return, with retention rates of incoming degree mobile students at less than 5–7% in Latvia and Lithuania, compared to around 25–45% in the Netherlands, Finland and Czechia. For these countries, degree mobility combined with graduate retention in host countries creates lasting demographic and fiscal pressure.

Other countries, including Germany, Ireland, Malta, Sweden, Luxembourg and Poland, treats imbalance as a secondary concern, prioritising openness and internationalisation.

What are the costs and benefits - for countries, students and institutions?

For host countries, the decisive variable is post-graduation retention. Where graduates stay and integrate into the labour market, comprehensive cost-benefit analyses consistently show net positive returns - from tax contributions, labour supply, demographic effects and knowledge transfer. Estonia's international students and recent graduates contributed €23.5 million in taxes in 2022/23, more than double the 2019/20 figure. In the absence of retention, the calculus reverses: host countries subsidise education for graduates who return the benefit elsewhere, a dynamic particularly acute in publicly funded, low-tuition systems.

For sending countries, degree mobility delivers genuine human capital gains when graduates return or maintain ties - intercultural skills, language proficiency, research networks, and access to specialised qualifications unavailable at home. These gains are most reliably realised in intra-EU contexts, where return rates are higher than for EU–non-EU mobility. The risks are concentrated in the persistent brain drain dynamic: where outflows are high and return rates low, sending countries bear the primary and secondary education investment while the tertiary education premium is captured abroad.

For students, degree mobility is associated with earnings gains, lower unemployment, improved employability and the accumulation of 'mobility capital'. However, costs are substantial and disproportionately borne by lower-income students: financial exposure (tuition, living costs, upfront deposits), administrative complexity, recognition barriers on return, and social and emotional costs. These burdens function as structural inequalities in access, not merely individual inconveniences.

For higher education institutions, intra-EU mobility brings income diversification, economies of scale, research capacity and reputational benefits –

but also housing and integration pressures, overreliance on tuition-fee income from abroad, and strategic trade-offs between national and international curricular priorities.

What drives students' choice of destination?

Push and pull factors for intra-EU degree mobility form distinct clusters.

Language and geography are the dominant structural determinants: most major bilateral flows are between neighbouring countries sharing a language of instruction, with geographical proximity being the strongest predictor of bilateral flow volume. Countries offering programmes in widely spoken languages – French, German, Spanish, Portuguese, English – attract students accordingly; the Netherlands, Nordic countries and Ireland capture significant shares through English-taught programmes.

Economic factors – free or subsidised tuition, lower cost of living, and post-graduation employment prospects – are consistently ranked among the top destination pull factors by students themselves. Countries where public higher education is free to EU students (e.g. Austria and Denmark) appear systematically among the highest-ratio receivers.

Qualification recognition remains a structural barrier in multiple directions: complex recognition procedures act as a deterrent to mobility, particularly for returning graduates in regulated professions, and delays contribute to lower return rates.

What happens after graduation? Retention, return and strategic mobility

International degree mobility is increasingly framed by receiving countries as a skilled labour market instrument. Most EU Member States now offer post-study work permits of 9–12 months for non-EU graduates, and countries including Finland, Germany, Italy, Estonia and Czechia have explicitly integrated international student recruitment into national skilled labour strategies. The share of student permits converted into work permits ranges from around 50% in some countries to below 10% in others, reflecting wide variation in integration policy effectiveness.

Several countries with high outward mobility - Cyprus, Italy, Poland, Bulgaria, Portugal, Croatia and Romania - have introduced return incentive schemes combining tax exemptions, relocation grants and academic salary support. Slovenia, Estonia and Lithuania go further, making scholarship support for outgoing students conditional on a period of return employment. These schemes, however, target broadly defined skilled returnees rather than recent graduates specifically, and their reach remains limited relative to the scale of outflows.

Regulated professions: a specific dimension of imbalance

Mobility in fields leading to regulated professions - medicine, dentistry, veterinary pharmacy, nursing - displays structurally skewed patterns with particular policy implications. Capacity-constrained systems (France, Germany, Ireland, Norway, Spain) export students to Central and Eastern European countries (Romania, Czechia, Hungary, Poland, Croatia, Lithuania, Latvia) that have developed dedicated international tracks, often in English or German, as significant revenue sources.

This architecture creates asymmetric recognition burdens for competent authorities, potential shortages in domestic professional supply in receiving countries where retention is low, and a fragmentation of the European professional qualification landscape that existing recognition frameworks manage imperfectly. The Directive 2005/36/EC framework provides a legal minimum but does not address the structural misalignment between student flows and professional workforce needs.

II. Credit Mobility: Participation Gaps, Barriers and Innovation

Trends and the EU target: a large participation gap

Erasmus+ supported nearly 400,000 student mobilities in 2023 alone, and EU-supported programmes account for 54% of all credit mobile graduates with stays of at least three months. Eurostat data show that the share of graduates with a credit mobility experience of at least three months grew between 2018 and 2022, with only a limited COVID-related dip. However, **the EUROSTUDENT survey reveals a striking gap**: only around 6% of all students have undertaken a study period abroad, while 30% of the remaining 94% express an intention to do so. This 'intention-participation gap' is the central diagnostic of the credit mobility system: the obstacles are not attitudinal, but structural and financial.

The Council Recommendation's 23% target for 2030 ⁴ – combining credit and degree mobility – remains distant for most Member States, with the majority currently clustered between 5% and 15% of graduates with mobility experience.

What drives – and blocks – credit mobility?

Data across all 29 countries identify five distinct obstacle clusters:

- **Financial burden** is the dominant cross-European constraint, reported as a major obstacle by 47–74% of students depending on the country. The highest shares are found in Southern and Eastern Europe (Portugal 74%, Poland 73%), while the lowest are reported in Nordic systems (Denmark 47%). Financial barriers include both direct costs and the loss of income from paid employment.
- **Social and employment constraints** constitute a second major cluster of barriers. Separation from partners, children and social networks, together with the potential loss of paid employment, is particularly salient in Nordic countries and systems with older student populations, reflecting a broader “work–study compatibility” challenge.
- **Structural and institutional barriers** are concentrated primarily in Central and Eastern Europe. These include curricular rigidity, difficulties integrating mobility periods into study programmes, and concerns about credit recognition. Such barriers are particularly severe in regulated

(⁴) EU target for credit mobility participation of Higher education graduates by 2030 from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:C_202403364

programmes, including medicine, teaching and nursing, where tightly sequenced placements leave limited scope for mobility.

- **Access and administrative barriers** continue to limit participation in some countries. Complex eligibility rules, administrative requirements and restricted access to mobility opportunities are most pronounced in Poland, Portugal and Romania.
- **Low perceived benefit** represents a distinct motivational barrier to mobility. Students in countries such as Slovakia and Poland (34–37%) are more likely to question the academic or labour-market value of studying abroad, whereas students in Nordic systems generally perceive mobility as beneficial because it is more strongly embedded within curricula.

What is the relationship between credit and degree mobility?

Evidence consistently shows that credit-mobile graduates are more internationally oriented: 40% of Erasmus alumni moved to another country at least once since graduation, compared to 23% of non-mobile alumni. Degree-mobile graduates are even more likely to work abroad than credit-mobile graduates. However, **there is no robust evidence that credit mobility directly causes an increase in degree mobility participation.**

Innovative formats: blended mobility, European Universities and joint degrees

Blended and virtual mobility have emerged as significant tools, particularly for inclusion. Blended Intensive Programmes (BIPs) within Erasmus+ combine short physical stays with online components, lowering the financial, time and social barriers to international experience. Evidence from alliances such as RUN-EU and Una Europa confirms their potential for reaching previously excluded student groups.

European Universities alliances - 65 alliances across 573 institutions in 35 countries by 2024 - represent the most structural transformation. They have produced a 448% increase in intra-alliance student mobility over their first three years, are embedding automatic ECTS recognition as the norm, and are systematically supporting smaller and regional institutions that traditional Erasmus+ flows systematically bypassed. 50% of alliances have a joint student mobility strategy; 78% use the European Student Card.

Joint European degrees represent the next step: the Commission's Blueprint for a European Degree (2024), followed by the Council resolution of May 2025 establishing a joint European degree label with phased implementation through 2029, will embed mobility-by-design into programmes across borders - reducing recognition barriers and creating institutionally guaranteed circulation.

Good practices in financial support for credit mobility

The most effective financial support systems share five characteristics: stable and predictable multi-year EU-level funding (the Erasmus+ model); national top-up grants for students from lower-income households; institutional co-investment and shared governance (as in European Universities alliances); portability of national student loans under equal conditions; and timely disbursement to avoid upfront liquidity barriers.

III. Inclusive Mobility: Access, Persistence and the 20% Target

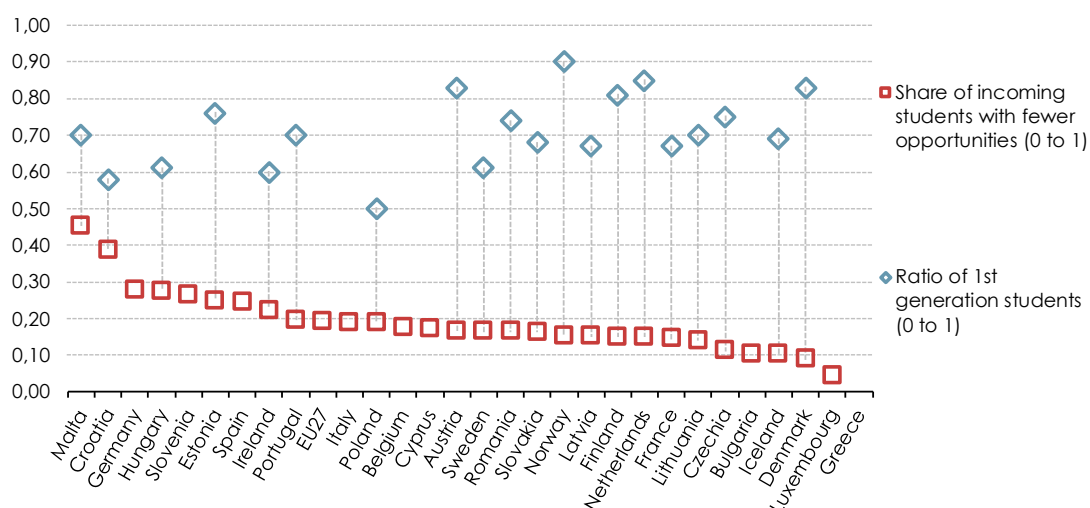
What does 'inclusive mobility' mean, and where does it stand?

Under the Erasmus+ Programme Guide and the 2024 Council Recommendation, inclusive mobility is a **barrier-based, not deficit-based** concept: the question is whether education systems provide adequate support, not what individuals lack. 'People with fewer opportunities' are defined by the structural obstacles they face – economic, social, geographic, health-related, cultural, or related to discrimination – with national authorities given significant latitude to adapt the EU-level definition to their context.

Erasmus+ data for 2024 report that 20.5% of outgoing student participants at ISCED level 6–8 were identified as having fewer opportunities - nominally meeting the 2027 benchmark of 20%. However, this figure must be interpreted with considerable caution: national definitions vary widely, the post-2021 expansion of the Programme Guide's definition accounts for a significant share of the observed increase in several countries (Latvia, Lithuania, Malta), and the data covers Erasmus+ alone, not all forms of learning mobility.

Regional disparities are stark: Southern Europe (25.5%) and Western Europe (22.2%) report shares well above the EU average, while Northern Europe (9.4%) and Eastern Europe (8.3%) report significantly lower shares. These differences reflect definitional variation and funding system differences as much as substantive inclusion: Nordic countries' high baseline student support reduces reliance on Erasmus+ top-up mechanisms, so formally lower 'fewer opportunities' shares do not imply weaker inclusion in practice.

Figure 3: Share of students with fewer opportunities and ratio of 1st generation students participating in Erasmus+ learning mobility (2022)⁵.



⁵ Indicator 1: Share of incoming and outgoing short cycle, bachelor's and master's students with fewer opportunities with support from the Erasmus+ programme in the incoming and outgoing student population at the same level

Indicator 2: The ratio between the mobility rate of students whose parents did not attain tertiary education (first-generation students) and the mobility rate of students with at least one parent who completed tertiary education (non-first-generation students) at short cycle, bachelor's, and master's levels.

Source: Study team, EHESO data (Latest data available as of 09-2025).

Who is still excluded – and why?

Despite progress, students with disabilities, those from migratory backgrounds, and students from lower socio-economic backgrounds remain systematically underrepresented in mobility. The EUROSTUDENT analysis shows that the likelihood of credit mobility participation rises consistently with parental wealth across all countries, with the gap between top and bottom wealth quartiles largest in Southern and Eastern European systems.

The five main obstacles: 1.- financial burden, 2. income and employment loss, 3. administrative complexity, 4. disability-related barriers (including gaps in support infrastructure at destination institutions), and 5. lack of targeted information - tend to accumulate for students who are already disadvantaged within their national higher education systems. Blended and short-term formats have reduced some barriers but have not eliminated structural access inequalities.

First-generation students (those whose parents did not attain tertiary education) are a particularly relevant group: their mobility participation rate relative to peers from academically educated families is closest to parity in Nordic and Western European systems and furthest from parity in several Southern and Eastern European systems, largely overlapping the geographical pattern of financial barriers.

What works – and what needs to change?

Evidence from country reports identifies several categories of effective practice: supplementary top-up grants targeted at students with lower incomes or disabilities; blended and short-term mobility formats as 'gateway' experiences reducing the initial commitment required; curriculum-embedded mobility windows that make participation the default rather than the exception; dedicated pre-departure support and peer mentoring for first-generation and non-traditional students; and institutional inclusion strategies embedded within broader internationalisation plans.

Future trends across countries point toward mainstreaming of inclusion within internationalisation policy, expansion of short-term and digital formats, and stronger institutional data collection - though quantitative evidence of impact remains limited across the board.

The fundamental constraint is the **absence of a common cross-EU definition and measurement framework** for inclusive mobility. Without harmonised data on 'people with fewer opportunities' across all forms of mobility – not only Erasmus+ – meaningfully evaluating progress toward the 20% target or developing evidence-based EU-level interventions cannot be achieved. The Council Recommendation's invitation to the Commission to propose a measurement methodology by 2026 is therefore a critical prerequisite for all subsequent policy action.

IV. Looking Ahead: Foresight Scenarios and Policy Priorities

Four scenarios for intra-EU degree mobility in 2030

The study's foresight analysis, based on consultations with stakeholders and country experts, identifies two key drivers of uncertainty for degree mobility to 2030: **financial conditions** (whether costs remain impactful or are substantially socialised through public instruments) and **geopolitical context** (whether the EU moves toward stabilisation and renewed integration, or toward fragmentation and rising tensions).

These two axes generate four plausible scenarios:

- Under the best-outcome scenario (Scenario 2: stabilised geopolitics, reduced financial barriers), mobility expands and becomes more socially diverse, but structural asymmetries in language, reputation and labour markets mean that flows remain unbalanced unless explicit circulation and return measures are in place.
- Under the worst-outcome scenario (Scenario 3: geopolitical fragmentation combined with high financial barriers), degree mobility survives as an elite phenomenon concentrated in perceived 'safe' destinations, ceasing to function as a tool of cohesion or inclusion.

Figure 4: Overview of scenarios for the future (2030) of balanced and inclusive intra-EU degree mobility.



Critically, **no scenario produces balanced mobility automatically**: it requires deliberate policy design in every plausible future.

Key policy priorities

Drawing on the full evidence base and scenario analysis, the study identifies seven mutually reinforcing areas requiring EU-level action:

- 1. Establish a shared operational framework for balanced degree mobility**
– Clarify and operationalise balanced degree mobility. Develop a common analytical framework assessing balance through net fiscal, labour-market, demographic and institutional impacts - not flow ratios alone - and embed this as a monitoring dimension within existing EU targets.
- 2. Support circulation and return as core components of balanced mobility**
– Build a European talent circulation toolbox. Make return support and onward mobility pathways the default feature of publicly funded degree mobility - through return grants, 'come-back' traineeships, cross-border employer partnerships, and digital matching tools linking graduates with opportunities across Member States, including in their countries of origin.
- 3. Actively steer mobility destinations through incentive and capacity building** – Use Erasmus+ grants and joint programme funding to incentivise mobility toward destinations that are currently under-selected, invest in institutional capacity in lower-visibility regions, and support European Universities alliances that structurally integrate under-represented institutions.
- 4. Embed inclusion as guiding principle while acknowledging its interaction with balanced mobility outcomes** – Facilitate and enable the promotion of inclusion as a shared design orientation, the encouragement of greater consideration of balanced mobility outcomes and the supporting of the development and scaling of blended and hybrid formats.
- 5. Interpreting the EU mobility target as a system-level objective** – establishing the mobility target as a system-level objective based on alignment of EU-level instruments, national frameworks and institutional practices.
- 6. Achieving the target through degree mobility: expanding access while managing concentration** – Supporting the strategic expansion of joint-degree programmes taught in international languages, scaling up investment in student accommodation and embedding degree mobility more explicitly within EU mobility targets.
- 7. Achieving the target in credit mobility: closing the participation gap** - Close the credit mobility participation gap. Strengthen Erasmus+ grants and ensure timely disbursement; invest in language learning; simplify administrative processes; promote mobility-friendly curriculum design through joint degrees and alliances; and prioritise underrepresented student groups in funding allocation.
- 8. Ensuring inclusiveness and sustainability of target achievement: address inclusiveness and balance alongside headline participation figures**, so that progress towards the mobility target does not mask social stratification or geographic concentration. Embed inclusion as a design principle across mobility instruments; link progress on the target to destination

diversity and circulation outcomes, not participation rates alone; and use blended and virtual mobility strategically to stabilise participation during geopolitical or economic disruption, without replacing physical mobility.

1. Introduction

1.1. Aim and context of the study

Learning mobility has long been a central objective of European cooperation in higher education, notably through the Erasmus+ programme and, more recently, within the broader vision of the European Education Area. Mobility is seen as a key driver of educational quality, employability, social cohesion and European integration. These objectives have been reaffirmed in the Communication on Achieving the European Education Area by 2025⁶ and the European Strategy for Universities⁷, both of which emphasise the need to further expand learning mobility while ensuring that it is inclusive, sustainable and strategically aligned with broader societal goals. More recently, the Union of Skills has reinforced this agenda from a skills perspective, framing balanced cross-border mobility and the free movement of knowledge and skills as objectives to be advanced through the validation of skills, the recognition of qualifications and strengthened transnational cooperation⁸.

The **Council Recommendation** “Europe on the Move”⁹ called for widening participation in learning mobility, signalling that improving balance is part of a cohesion agenda for the European Education Area. More specifically, the Recommendation emphasised the need to produce a study by 2025 analysing the “challenges and impacts of balanced mobility (including credit and degree mobility) in the EU, and the “various consequences of the brain circulation phenomenon”¹⁰.

In this context, the Recommendation sets an ambitious target for higher education mobility, calling for at least 23% of graduates at the EU level to have a learning mobility experience by 2030¹¹. Existing data for 2023 shows a significant variation in outward mobility rates of graduates across the EU. Only a few countries (notably Luxembourg and Cyprus) are surpassing the 23% outward mobility target set in the Council

⁶ European Commission. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of Regions on achieving the European Education Area by 2025, published on 30 September 2020.

<https://www.eu.dk/samling/20201/kommissionsforslag/kom%282020%290625/kommissionsforslag/1693971/2253770/index.ht>

⁷ European Commission, Communication on a European Strategy for Universities, COM(2022) final, graphic version (January 2022), available at: <https://education.ec.europa.eu/sites/default/files/2022-01/communication-european-strategy-for-universities-graphic-version.pdf>

⁸ European Commission, Communication The Union of Skills, COM(2025) 90 final, 5 March 2025. The Communication identifies balanced cross-border mobility and the free movement of knowledge and skills as objectives in its section on circulating skills across the EU, to be supported by facilitating the validation of skills and the recognition of qualifications.

⁹ Council Recommendation of 13 May 2024, “Europe on the Move” - *Learning Mobility Opportunities for Everyone* (C/2024/3364), Official Journal of the European Union, 14 June 2024. Available at: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:C_202403364

¹⁰ Ibid.

¹¹ For the learning mobility target in higher education, the mobility actions covered include: outgoing degree mobility; outgoing credit mobility of a minimum of three months or 15 European Credit Transfer and Accumulation System (ECTS) credits (including both traineeships and study mobility); and shorter outgoing mobility consisting of less than three months and at least three ECTS credits.

Recommendation. Most countries remain well below this target, with the majority clustered between 5% and 15%. However, several data limitations persist, which may result in a progress towards reaching the target being underestimated¹².

In addition, the Council set another target of giving learning mobility access to at least 20% of people with fewer opportunities. Data on this sub-group of learners are not currently available and there is no common definition at EU level¹³.

At the same time, the European Commission¹⁴ and some Member States have raised concerns about the potential imbalance of mobility inflows, particularly in relation to degree mobility, which may generate unintended consequences such as pressures on national education systems, shortages in specific study fields, or asymmetric brain circulation. These concerns have been highlighted in recent policy debates and ministerial discussions, as well as in previous analytical work, but the concept of “balanced mobility” remains insufficiently defined and operationalised across countries and policy levels.

Against this backdrop, **the aim of this study is to contribute to the strategic debate and provide evidence-based policy advice on promoting balanced and inclusive learning mobility** in higher education (ISCED 6–8) in the EU/EEA, while supporting progress towards the agreed mobility targets. The study covers degree mobility, credit mobility and inclusive mobility, examining motivations, patterns, impacts and challenges covering the perspectives of individuals, higher education institutions, labour markets and society at large.

The study adopts a **comparative and forward-looking approach**, drawing on quantitative and qualitative data from all EU and EEA countries. It analyses both intra-EU mobility and mobility with third countries, taking into account economic, social and institutional factors, as well as emerging developments such as blended mobility, European Universities alliances and joint degrees. While the primary focus of this study is on intra-European degree mobility and the questions of balance it raises, intra-EU mobility cannot be fully isolated from global mobility: a recent, sharp rise in third-country students - already exceeding half of enrolment in some programmes - is raising new questions about balance that, although beyond the core scope of this study, form an important part of the context in which it sits.

On this basis, the study formulates policy conclusions and recommendations to support EU and national authorities, as well as higher education stakeholders, in fostering mobility that is not only more widespread, but also more balanced, inclusive and sustainable.

¹² European Commission, (2025). [Education and Training Monitor 2025- Comparative report](#).

¹³ The Council invited the Commission to put forward a proposal for a methodology to calculate this target by 2026.

¹⁴ Council Recommendation of 13 May 2024, “*Europe on the Move*” - *Learning Mobility Opportunities for Everyone* (C/2024/3364), Official Journal of the European Union, 14 June 2024. Available at: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:C_202403364

1.2. Methodological recap

The study adopted a **mixed-methods and multi-level methodological approach** to analyse balanced and inclusive learning mobility in higher education (ISCED 6–8) across the EU and EEA. The methodology was designed to ensure analytical robustness, cross-country comparability and sensitivity to national contexts, while responding directly to the research questions. It combined EU-level desk research, quantitative data analysis and in-depth country-level qualitative research, complemented by thematic case studies and a forward-looking foresight component.

At EU level, the study team carried out an **extensive review of policy documents, evaluation studies, academic literature and grey literature**, which provided the conceptual and analytical foundation for the study, including the evolving understanding of balanced and inclusive mobility. This review informed the development of analytical frameworks and indicators applied consistently throughout the analysis.

In parallel, a **comprehensive quantitative analysis was undertaken using multiple EU and international data sources**, including Eurostat, Erasmus+, UNESCO, OECD, the European Higher Education Sector Observatory (EHESO), EUROSTUDENT, Eurograduate, Eurydice and the Education and Training Monitor. Existing indicators were systematically reviewed and, where relevant, complemented by additional indicators (e.g. inbound and outbound mobility rates and net mobility flows), allowing for comparative analysis by country, level of study and field of education.

A central pillar of the methodology consisted of the **preparation of 29 country reports**, covering all EU-27 Member States as well as Norway and Iceland. Each country report synthesised comparable quantitative evidence on learning mobility patterns with qualitative evidence from desk research and interviews with National Contact Points (NCPs), providing a structured overview of national mobility profiles, policy frameworks, support instruments and key challenges. NCPs contributed to data validation and contextual interpretation, ensuring consistency and comparability across countries.

In addition, the study included a **foresight analysis** to explore how learning mobility patterns and policy challenges may evolve towards 2030 and beyond. This component combined desk-based horizon scanning with expert input to identify key drivers of change, such as demographic trends, digitalisation, green and digital skills' needs, evolving labour market demand, and geopolitical developments. On this basis, a set of plausible future scenarios was developed to assess potential implications for the balance, inclusiveness and sustainability of learning mobility under different future conditions.

Finally, two **thematic case studies**, selected in agreement with the Contracting Authority, were developed to provide in-depth insights into specific policy instruments and practices relevant to learning mobility: one on the *Central European Exchange*

Programme for University Studies (CEEPUS) and one on the *Bienvenue en France Label*. Together, they illustrate different approaches to supporting and structuring mobility at programme and institutional level. The present report provides a synthesis and cross-analysis of this evidence, addressing the study questions and translating the findings into conclusions and recommendations at EU, national and institutional level.

2. Findings and answers to the study questions

2.1. Degree mobility

2.1.1. The concept and policy framing of balanced degree mobility

Study question	What is the concept of “balanced mobility” that pertains at regional, national and EU level (including the international dimension)?
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2.1.1.1. Balanced degree mobility in the EU policy context

Current EU debates frame balanced degree mobility as a contextual and strategic policy choice, to be assessed through disaggregated impacts rather than uniform flow targets across countries.

Student mobility is a foundational objective of EU policy, embedded in the very architecture of the European project. The Treaty on the Functioning of the European Union (TFEU) explicitly charges the Union, under Article 165, with **contributing to quality education by encouraging cooperation between Member States and promoting the mobility** of students and teachers¹⁵. This treaty-level commitment reflects the broader logic of the EU single market and European citizenship: under Articles 20–21 TFEU and the Free Movement Directive 2004/38/EC, all EU citizens enjoy the right to move and reside freely across the Union, including for the purpose of study¹⁶.

At the policy level, the EU has consistently framed student mobility as a driver of both individual opportunity and collective competitiveness. The 2022 European Strategy for Universities¹⁷ identified mobility as essential for boosting Europe’s attractiveness not only as a study destination but as a global partner in education, research and innovation. The strategy underscored the **link between student mobility and the EU’s capacity to address the green and digital transitions** by producing highly skilled graduates: as the Commission noted, 80% of recent tertiary graduates in the EU gain employment within three months of graduating, making higher education – including cross-border education – a key enabler of labour market integration and economic competitiveness.

The Commission’s 2025 Union of Skills initiative likewise highlights how circulating talent and skills across the EU is essential for **unlocking the full potential of the**

¹⁵ Consolidated version of the Treaty on the Functioning of the European Union, Article 165 (ex Article 149 TEC). OJ C 202, 7.6.2016, pp. 120–121. https://eur-lex.europa.eu/eli/treaty/tfeu/2016/art_165/oj/eng

¹⁶ Consolidated version of the Treaty on the Functioning of the European Union, Articles 20–21 (EU Citizenship and free movement rights). See also Directive 2004/38/EC of the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States. OJ L 158, 30.4.2004. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32004L0038R%2801%29>

¹⁷ European Commission. *European Strategy for Universities*. Communication COM(2022) 16 final, 18 January 2022. <https://education.ec.europa.eu/education-levels/higher-education/about-higher-education>

single market and for addressing structural labour shortages that threaten the EU's competitiveness¹⁸. In this context, intra-EU degree mobility is valued not only for its educational benefits but as a mechanism for supplying host-country labour markets with highly skilled graduates, stimulating innovation, and attracting international talent to Europe more broadly.

It is against this positive backdrop – where mobility is promoted as a right, a tool of competitiveness, and a building block of the European Education Area – that the concept of 'balanced mobility' has also emerged as a complementary EU policy concern. The EHEA documents discussed below, while not strictly EU law, have been influential in shaping how Member States and institutions discuss the directionality and sustainability of degree mobility flows.

More recent policy initiatives and relevant academic literature of the past decade have further **refined and elaborated the concept of balanced student degree mobility, taking into account factors beyond the mere balance of incoming and outgoing student flows.**

Academic literature, such as Ferencz¹⁹, Wulz and Rainer²⁰, Hoogenboom²¹, and Fedotov²², argues that balancing degree mobility solely in terms of inflows and outflows, without further analysis of the needs and constraints of each country's context, is insufficient. Other factors that should be considered **include the funding of education (e.g., host country taxpayers financing entire degree programmes for foreign students), the lack of consideration given to the structural challenges faced by host institutions** in accommodating a large number of foreign students, the economic benefits accruing to higher education institutions through the collection of tuition fees from incoming students (particularly from non-EU students), and the bureaucratic and costly processes involved in diploma recognition across countries.

In addition, there is the issue of **brain drain** in sending countries, as degree students who study abroad often establish their careers in the host country, while host countries benefit from increased human capital (**brain gain**), to mention only a few examples. When degree graduates remain in the host country, they contribute as highly skilled employees or business owners, enhancing the host country's labour market, tax base, and productive capacity²³. Moreover, the overall investment made by the host country to educate a degree mobile student is proportionally lower than it might appear: while the host country co-finance higher education through tax-funded university budgets,

¹⁸ European Commission. *Union of Skills*. Communication COM(2025) 10 final, 5 February 2025. https://commission.europa.eu/topics/competitiveness/union-skills_en

¹⁹ Ferencz, I. (2015). *Balanced Mobility Across the Board-A Sensible Objective?*. In: Curaj, A., Matei, L., Pricopie, R., Salmi, J., Scott, P. (Eds.). *The European Higher Education Area*. Springer. https://doi.org/10.1007/978-3-319-20877-0_3

²⁰ Wulz, J., & Rainer, F. (2015). Challenges of Student Mobility in a Cosmopolitan Europe. In: Curaj, A., Matei, L., Pricopie, R., Salmi, J., Scott, P. (Eds.) *The European Higher Education Area*. Springer, Cham. https://doi.org/10.1007/978-3-319-20877-0_3

²¹ Hoogenboom, A. (2017). *Balancing Student Mobility Rights and National Higher Education Autonomy in the European Union*. Brill.

²² Fedotov, D. (2023). *Student mobility and the struggle over European integration: the lessons of the Bologna process* [Published doctoral dissertation]. University of Toronto. <https://utoronto.scholaris.ca/server/api/core/bitstreams/64baa5de-acc9-4c86-a125-66758f290b32/content>

²³ Jakobsen, L.B. and Crosier, D. (2018). Focus on: Is one country's brain gain another one's drain? Eurydice, European Education and Culture Executive Agency. <https://eurydice.eacea.ec.europa.eu/news/focus-one-countrys-brain-gain-another-ones-drain>. See also: Lucchetti, J., Murgia, G. and Pastore, F. (2021). Do international classes pay off? A cost-benefit analysis of the internationalisation of higher education in Flanders. *Higher Education*. <https://doi.org/10.1007/s10734-021-00737-0> (finding that benefits to the host country from international students exceed costs by a factor of 2.4–3.1, driven primarily by graduate retention in the host-country labour market).

it has borne none of the costs of that student's primary and secondary schooling, which were fully financed by the sending country. This asymmetry means that host countries benefit from a substantial 'education subsidy' from sending countries when graduates enter and remain in the host labour market - a dimension of the brain gain argument that is often absent from discussions focused narrowly on tuition shortfalls²⁴, to mention only a few examples.

The "*Mobility strategy 2020 for the European Higher Education Area*"²⁵ aligned with this academic literature and emphasised the need for systematic data collection on degree mobility flows and the need to incentivise countries to discuss multilaterally or bilaterally the negative consequences of mobility flows, and to consider together, advantages, disadvantages as well as possible solutions.

The **2024 Bologna Process Implementation Report**²⁶ asked about the benefits of simply balancing numbers in the flow and directionality of learning mobilities across European countries. The report emphasised that balancing mobility in the EHEA is a complex and contextual process²⁷ and is not necessarily desirable if balance is understood merely as achieving similar inflows and outflows across EHEA countries, since at certain education levels and in specific policy contexts, intentionally imbalanced mobility flows are actively encouraged to support strategic policy objectives (e.g. targeted attraction initiatives such as Choose Europe targeting doctoral students and researchers from third countries²⁸).

Further, the report presented four types of degree mobility that are in-line with incoming and outgoing (im)balances. While the four-category typology is drawn from the Eurydice *Bologna Process Implementation Report*²⁹, the country examples presented in the table reflect the current situation based on Eurostat data for 2023 (see the subsection 2.1.2 below and Annex 2 for the underlying data).

²⁴ Gérard, M. and Sanna, A. (2017). Students' Mobility at a Glance: Efficiency and Fairness When Brain Drain and Brain Gain Are at Stake. *Journal of International Mobility*, 5(1), 43–74. <https://doi.org/10.3917/jim.005.0043>. See also: Gérard, M. and Uebelmesser, S. (eds.) (2014). *From Mobility of Students to Mobility of the Highly Skilled: Implications for Fiscal and Economic Policy*. CESifo Series, MIT Press. Both works analyse the fiscal asymmetry between sending and host countries in degree mobility, noting that host countries benefit from graduates' prior schooling investment by sending countries without having borne any of those costs. See also Jakobsen and Crosier (2018), op. cit., which notes that host countries in Western Europe "reap the rewards of prior investment into the education of the migrants entering their country."

²⁵ *Mobility for Better Learning - Mobility strategy 2020 for the European Higher Education Area*, published 27 April 2012. https://ehea.info/media.ehea.info/file/2012_Bucharest/39/2/2012_EHEA_Mobility_Strategy_606392.pdf

²⁶ European Commission, EACEA, Eurydice. *The European Higher Education Area in 2024: Bologna Process Implementation Report*, published in April 2024. <https://ehea.info/Immagini/the-european-higher-education-area-in-2024-EC0224018ENN1.pdf>

²⁷ EHEA flows include both intra-EU mobility as well as flows between EU and non-EU countries, which occur under very different conditions (visas, tuitions, etc.).

²⁸ https://commission.europa.eu/topics/research-and-innovation/choose-europe_en

²⁹ Eurydice. *The European Higher Education Area in 2012: Bologna Process implementation report*. Published in April 2012. <https://eurydice.eacea.ec.europa.eu/publications/european-higher-education-area-2012-bologna-process-implementation-report>

Table 1: Categorisation of countries based on intra-EU degree mobility flows.

	Low inbound mobility	High inbound mobility
Low outbound mobility	“Closed systems”, when countries have a low outflow and an even lower inflow of students, also showing a negative balance. For example, Italy, Poland, France, Greece, Croatia.	“Attractive systems”, with low outflow and high inflow of degree students, also presenting a positive balance of student mobility³⁰. For example, the Netherlands, Denmark, Belgium, Czechia and Malta.
High outbound mobility	“Limited systems”, referring to countries with a high outflow and a low inflow of students, resulting in a negative balance of international student mobility and indicating brain drain. For example, Bulgaria, Luxembourg, Cyprus, Slovakia, Latvia, Lithuania, Estonia, Romania.	“Open systems”, corresponding to countries with high outwards mobility but an even higher inwards mobility, resulting in a positive balance. For example, Austria and, to a lesser extent Hungary.

Note: The examples are based exclusively on intra-EU degree mobility flows. The two axes capture the relative intensity of outbound and inbound mobility (i.e. mobility ratios), not absolute student numbers.

These four categories are ideal types. For a more granular classification in clusters of all EU countries, based on their inbound and outbound degree mobility flows, see the discussion of the corresponding two figures in section 2.1.4, one using in and outflows from and to all countries (worldwide) and a second one analysing mobility flows exclusively from and to other EU countries.

These debates related to definition of balanced degree mobility are now firmly embedded in the current policy agenda. At the first meeting (January 2025) of the Bologna/EHEA **Working Group on Internationalisation and Mobility 2024–2027**³¹, members stressed that “balanced mobility” must be clearly defined and assessed in terms of its impact-particularly regarding degree mobility-rather than reduced to a numerical comparison of inflows and outflows. Any definition should draw on disaggregated data (e.g. gender, field of study, regional context) and recognise that certain imbalances may reflect positive dynamics. Factors such as hosting country’s capacity, labour market needs, strategic priorities, and the realities of brain gain, and brain drain must therefore be integral to shaping the concept of balanced mobility. Several stakeholders argued that it may be more tractable to define what constitutes unbalanced mobility - and the threshold at which Member States might legitimately introduce countermeasures - than to define balanced mobility in the abstract, shifting the debate towards concrete instruments and mechanisms that address imbalances without hindering mobility or Member States’ support for it. This offers a practical entry point rather than an alternative objective, since the Council Recommendation is itself anchored in the concept of balanced mobility.

³⁰ Ferencz, I. (2015). Balanced Mobility Across the Board-A Sensible Objective?. In: Curaj, A., Matei, L., Pricopie, R., Salmi, J., Scott, P. (Eds.). *The European Higher Education Area*. Springer. https://doi.org/10.1007/978-3-319-20877-0_3

³¹ Working Group on Internationalisation and Mobility. *Minutes of the 1st meeting of the Working Group on Internationalisation and Mobility*- 27 – 28 January 2025. https://ehea.info/Download/WG_IM_1_PL_AL_Minutes_27.28.01.25.pdf

2.1.1.2. Conceptualisation of balanced degree mobility in national policies

Across the EEA, no EU/EEA country has formally defined the concept of “balanced degree mobility”. Nevertheless, most countries share a common practical understanding as broadly referring to a numerical balance between incoming and outgoing degree-mobile students.

The cross-country analysis indicates that **very few EU countries have a formalised concept of ‘balanced mobility’ in their strategic and policy documents.**

Although no formalised definitions are available, country-level research indicates that policymakers in several Member States share a broadly similar **practical understanding** of balanced mobility, generally referring to a **numerical equilibrium between incoming and outgoing degree students** (including the Netherlands, Belgium, Croatia, Estonia, Finland, Germany, Norway, and Slovakia).

For a second group of countries, including Cyprus, Czechia, Greece, Iceland, Italy, Bulgaria, Spain, Portugal, Hungary, Sweden, Latvia, Romania, Lithuania and Poland, the country-level analysis of this study **does not provide a formal definition nor a practical understanding** of balanced degree mobility, suggesting low relevance in these countries.

In **Denmark**, balanced mobility is primarily understood in **economic terms**, with emphasis on the financial implications of hosting international students and on the sustainability of mobility patterns. For degree mobility, balance is interpreted as aligning the number of study places offered in English-language programmes with graduates’ transition into the Danish labour market³². Cost-benefit considerations strongly shape this approach. A key policy concern is the **financial burden created by EU students** (due to the costs of Danish publicly subsidised study grants), offset against the potential long-term benefits of graduates’ employment in Denmark. These issues have been extensively studied and documented in recent years³³.

Additional insights into individual country perspectives are provided in Annex 2.

Thus, the country-level analysis shows that the concept of balanced degree mobility remains weakly institutionalised across the EEA. In most countries, the notion is applied pragmatically, either as a simple numerical ratio between incoming and outgoing students or as part of broader policy frameworks linked to financial sustainability and international competitiveness. In some cases, structural factors make balance in the conventional sense unattainable, where outward mobility is a systemic feature of the higher education landscape. Taken together, these findings

³² Ministry of Higher Education and Science (Denmark). (2018). *Justering af engelsksprogede uddannelser*. <https://www.ft.dk/samling/20171/almdel/UFU/bilag/158/1930107.pdf>

³³ See for example: Danish Agency for Science and Higher Education. (2018). *De engelsksprogede studerende – Registeranalyse*. <https://www.ft.dk/samling/20171/almdel/UFU/bilag/158/1930108.pdf>; Ministry of Higher Education and Science (Denmark). (2018). *Justering af engelsksprogede uddannelser*. <https://www.ft.dk/samling/20171/almdel/UFU/bilag/158/1930107.pdf>; Ministry of Higher Education and Science (Denmark). (2020). *Regeringen efter ny SU-prognose: Indgreb nødvendigt for at begrænse SU-udgifter til EU-studerende*. <https://ufm.dk/aktuelt/pressemeddelelser/2020/november/regeringen-efter-ny-su-prognose-indgreb-noedvendigt-for-at-begraense-su-udgifter-til-eu-studerende/>

suggest that “balanced mobility” is not a uniform or operationalised concept but rather a flexible idea shaped by national priorities.

2.1.1.3. Defining balanced mobility: From flows to impacts

Balanced mobility as a policy goal goes beyond counting the difference between incoming and outgoing students, instead focusing on the wider costs and benefits of mobility.

In line with the findings stemming from the literature review, country-level research, and the EHEA Working Group on Internationalisation and Mobility, the concept of *balanced mobility* needs to be clearly distinguished from a *balance in mobility flows*:

- **Balance of mobility flows** is a descriptive quantitative measure of the difference between inbound and outbound students. It can be disaggregated by mobility type, region of origin, study programme or student characteristics. While this analysis provides valuable information, it cannot guide policy decisions on its own.
- **Balanced mobility** is a *policy goal*. In essence, it is an assessment of the **net impact of degree mobility** - not simply whether inflows and outflows are equal, but whether the overall costs and benefits of degree mobility are shared in a sustainable and mutually beneficial way by host countries, sending countries and students.

On this basis, the concept of balanced mobility can be understood in two ways:

- **Balanced mobility as a win-win result.** Student mobility flows are considered balanced if both countries or regions gain from it.

Example: Country A (a third country) cannot meet growing demand for higher education, while Country B (an EU country) has unused capacity. Outward degree mobility from A to B eases pressure on A’s HE system, generates temporary income and human capital for B, and supports A with returning skilled workforce (upon the condition that the students return to the sending country after graduation).

Example: Country A is a smaller EU Member State with a limited range of higher education programmes and a tight public HE budget, while Country B offers a broader, well-resourced system with available capacity. Outward degree mobility from A to B allows students from A to access specialised programmes unavailable at home, reducing pressure on A to develop and fund those programmes domestically. Country B benefits from the contribution of internationally diverse students to its academic community and, where graduates remain and enter the labour market, from an addition to its skilled workforce. Country A, in turn, benefits if graduates eventually return - and retains a reputational and relational gain from its citizens having been educated in a high-quality EU system.

- **Balanced mobility as a positive-sum result.** Assessed at EU level, mobility flows can be considered balanced when they generate a net overall benefit across

systems, even if advantages are distributed asymmetrically between individual Member States. This is inherently a European perspective: a country experiencing persistent net outflows of graduates may legitimately view this as unfavourable from its own standpoint, and the positive-sum framing does not resolve that concern.

Example: Countries A and B are both in the EU. Country A faces limited study opportunities or weak labour market prospects for students upon graduation, while Country B offers stronger education-to-employment pathways. Student mobility from A to B improves individual learning and employment outcomes (upon the conditions that they remain and are integrated into the host country's labour market after graduation) and enhances the overall efficiency of education resources and human capital allocation across both systems, resulting in a benefit for the EU's competitiveness as a whole.

The core question remains whether mobility flows generate net positive, neutral or negative effects - and the answer depends significantly on the level at which outcomes are assessed. The same mobility pattern can produce different, even contradictory, conclusions depending on the perspective adopted. From the standpoint of an individual Member State, degree mobility may appear costly or imbalanced: a sending country may lose skilled graduates to stronger labour markets abroad, while a receiving country may face fiscal pressure from hosting large numbers of mobile students in publicly funded systems. From an EU-level perspective, however, the same flows may represent an efficient allocation of human capital, contributing to the Union's overall competitiveness and skills supply. In practice, EU policy objectives tend to reflect a tension between these two perspectives - acknowledging Member States' legitimate concerns while simultaneously promoting mobility as a collective European good. Assessments of whether mobility is "balanced" are therefore inherently perspective-dependent: what constitutes a satisfactory outcome at EU level may not be experienced as such by every Member State individually.

The key takeaway is that **balanced mobility is not about matching student numbers in either direction but about ensuring that degree mobility delivers positive results for the parties involved**. These results can relate to public expenditure, labour market outcomes, demographic shifts, institutional capacity or knowledge transfer. The following sections explore these dimensions in greater detail.

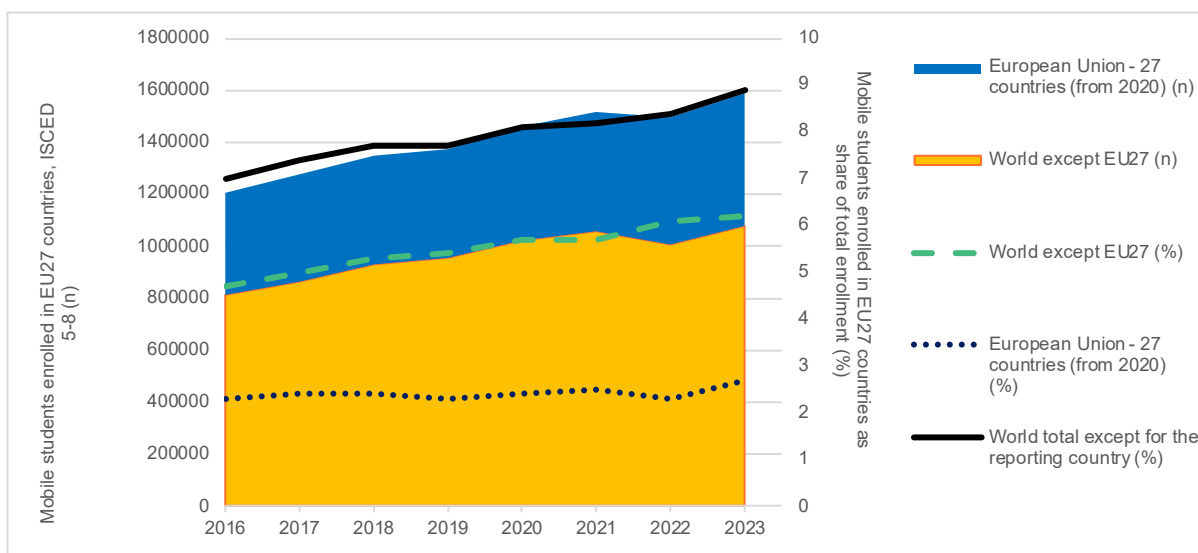
2.1.2. Recent trends and patterns in degree mobility

As shown in Figure 1, since 2016 (oldest comparable data available), a steady increase can be observed both for the total tertiary education³⁴ enrolment of degree mobile students – which rose by close to 400 000 students, a 32% increase between 2016 and 2023 – and for the share they represent among the total student population of the

³⁴ ISCED 5-8 is the official definition of tertiary education in the cross UNESCO-Eurostat-OECD methodology.

EU27, going from 7.2% to 8.9% (Eurostat, 2025)³⁵. The differences in this indicator between EU countries are also significant³⁶. This increase does not appear to have been significantly altered by the COVID-19 pandemic, besides perhaps a small reduction in 2022, quickly recovered in 2023. Figure 1 also illustrates how the bulk of this growth is linked to students from non-EU countries, as the share of total enrolment that intra-EU mobile students represent remained stable over this period.

Figure 5: Degree mobile students from abroad enrolled in EU27 countries³⁷, ISCED 5-8, by region of origin³⁸, in absolute numbers, and as share of total enrolment (2016-2023)(by region of origin)



Source: Prepared by study team, Eurostat data ([educ_uoe_mobs02](#), [educ_uoe_mobs03](#), 2025).

By comparison, intra-EU degree mobility flows (exclusively from EU countries to EU countries) follow a different pattern (as shown in Figure 7). Several clusters can be identified:

- Most countries have relatively balanced inflows and outflows of degree mobile students, each representing the equivalent of around between 2% and 4% of total enrolment. Here we can find Finland, Sweden, Portugal, Ireland, Germany, Slovenia, Latvia and Hungary with a slightly net positive (sending) flow, and Bulgaria, Estonia, Lithuania, Romania, and Greece with slightly net negative (receiving) flow.
- Spain and Poland have relatively balanced but equally low inflows and outflows, below 1.5% each.

³⁵ Share of [inbound] mobile students from abroad enrolled in tertiary education.

³⁶ Countries with shares above 10% (2022 data) include Luxembourg (50.5%), Malta (23.8%), Cyprus (20.2%), Austria (19.4%), Czechia (15.8%), Hungary (13.7%), Latvia (12.7%), Germany (12%), Portugal (12%), Slovakia (11.9%), Estonia (11.4%), Ireland (11%), Belgium (10.1%) and Denmark (10.1%). Countries with a share below 5% include Italy (4.2%), Spain (4%), Croatia (3.6%) and Greece (3.1%). As per EEA countries, the shares were 85.8% for Liechtenstein, 9.6% for Iceland and 4.1% for Norway. While there is no one variable that explains them, several factors can be noted affecting at least some countries. Most of these will be discussed in the section below on push and pull factors.

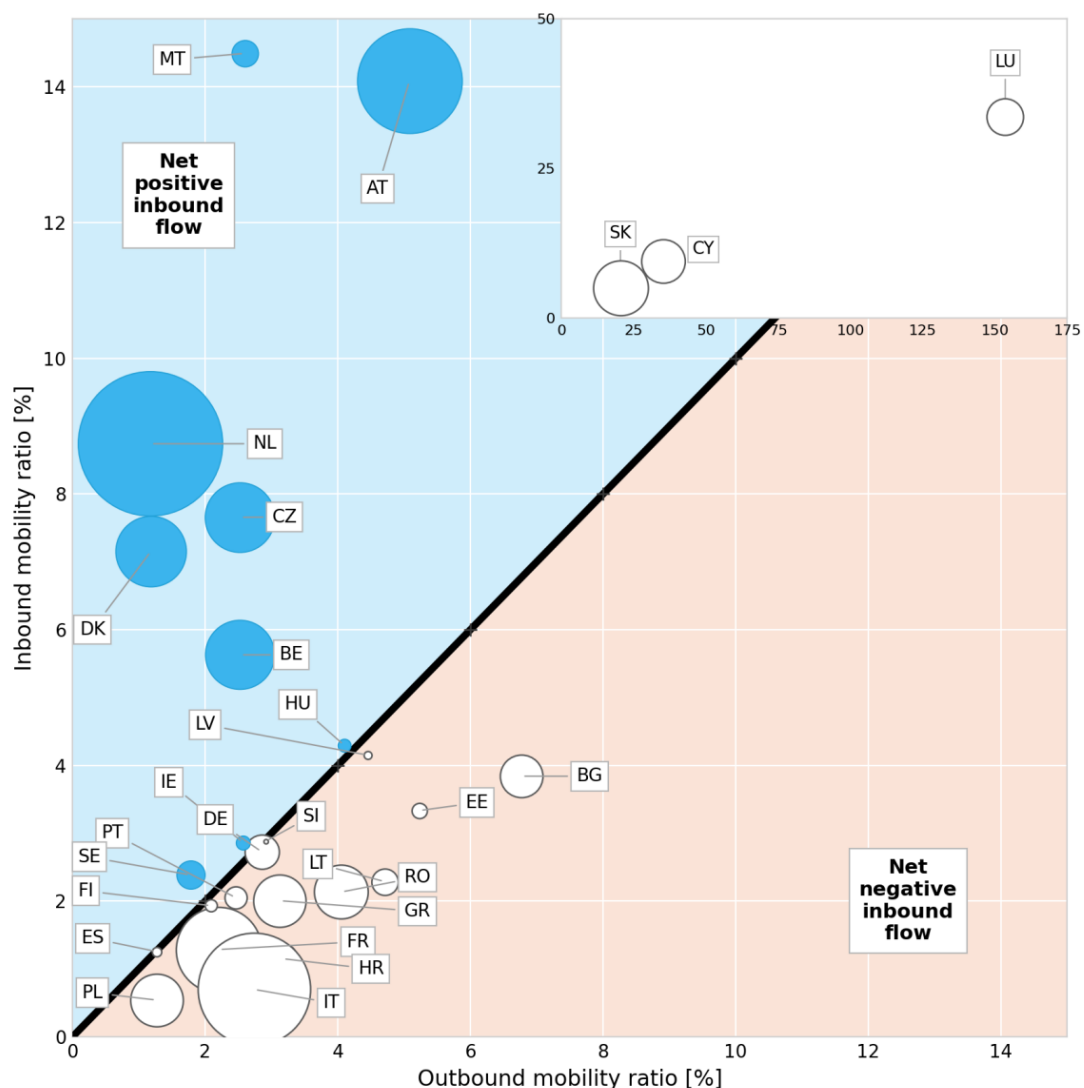
³⁷ Other than their own, for intra-European mobility. EU27 refers to Member States as of 2020. For consistency, UK data is not included in this group but as part of the rest of the world, even for the years when it was still part of the EU.

³⁸ Based on a common UNESCO-Eurostat-OECD methodology, the country of origin is determined to be the one where the student completed its upper secondary studies (which may not coincide with nationality).

- France, Italy and Croatia appear as clear net senders, particularly the first two, due to their student population size.
- Slovakia, Cyprus and particularly Luxembourg appear as outliers, with a very high net difference as sending countries, Luxembourg being the only country where the number goes above 100%, meaning that there are more students from Luxembourg studying tertiary degrees abroad than there are tertiary students in Luxembourg. In all three cases, most of the outflow can be explained through these countries' relatively smaller academic offer incentivising students to go to larger EU countries where they share the language; i.e. 40% of degree mobile Slovaks go to Czechia, 87% of Cypriots who study abroad do so in Greece, and 79% percent of Luxemburgish students do so in Germany, France or Belgium.
- On the opposite side, Belgium, Denmark, Czechia, the Netherlands, Austria and Malta are the clearest net receivers of degree mobile students. Several of these flows can be largely explained by students from a single country of origin: Slovakia for Czechia (83%), France for Belgium (62%), Germany for Austria (62%), and Italy for Malta (45%). What largely explains the first three pairs is the combination of geographical proximity (also applicable to the Italy-Malta pair), shared language of instruction (or mutual intelligibility in the case of Slovakia and Czechia)³⁹ and free tuition for those studying in the national language(s). Netherlands and Denmark's more diversified appeal can be explained by their offer of English-speaking programmes.

³⁹ Which also explains why Austria and Germany are each other's main country of origin, as are Czechia and Slovakia to each other, even though the mobility flows are higher in one direction than the other.

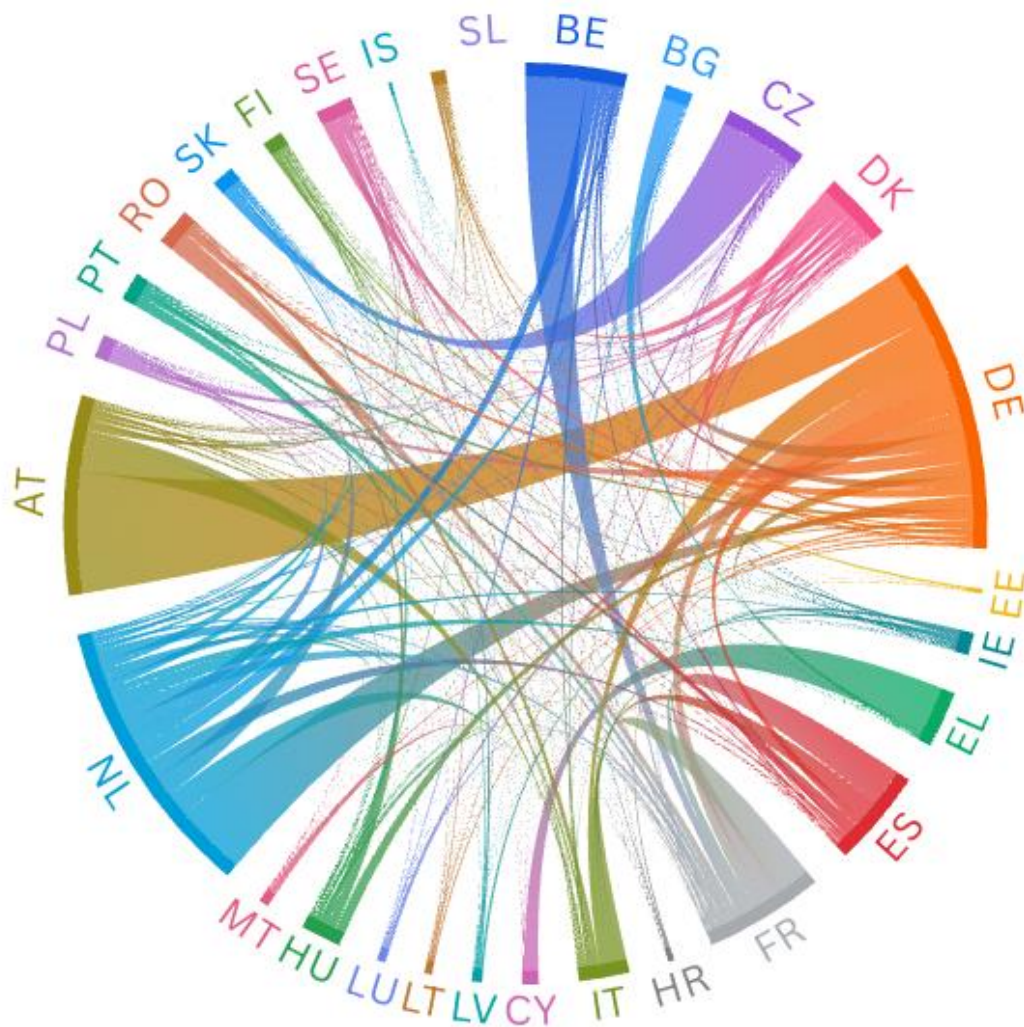
Figure 6: Intra-EU net inbound degree mobility flow (area), inbound mobility rate (%), outbound mobility ratio (%), tertiary education, by country (2023).



Note: Both axes show rates - incoming (vertical) and outgoing (horizontal) degree-mobile students as a share (%) of all tertiary students (ISCED 5–8) enrolled in the country, so countries above the diagonal are net receivers and those below are net senders. The circle area instead shows the net flow in absolute terms - the number of students by which intra-EU/EEA inflows exceed or fall short of outflows - so a large circle means a large net headcount. An alternative visualization of intra-EU inbound and outbound mobility flows for each Member State is offered in Annex 2, section 1.1.1.

Source: Prepared by study team, Eurostat data (2023): https://doi.org/10.2908/EDUC_UOE_MOBS02 and https://doi.org/10.2908/EDUC_UOE_ENRT01

Figure 7: Bilateral flows of degree mobile students (from EU/EEA countries to EU/EEA countries), ISCED 5-8 (2023).



Source: Eurostat, [educ_uoe_mobs02](#) (2023). Figure by study team.

Notes: The width of the lines represents the combined number of students going in both directions for any combination of two countries. Individual country-to-country flow numbers (including in each of the two directions separately) can be consulted via an interactive online version of the figure [\[click here\]](#).

In Annex 2, section 1.1.1 two additional figures on intra-EEA degree mobility can be found (based on the same data), providing different insights on individual country-to-country mobility flows.

Internationally mobile students are more prevalent at higher education levels: from 2.7% at short-cycle (ISCED 5) to 23.3% at doctoral level, with non-EU students representing the majority at each level. Detailed breakdowns by education level and country are provided in the Annex 2.⁴⁰

⁴⁰ The total number of international students from non-EU countries differs slightly from the previous figure. Though the source for both is the same indicator in Eurostat, for some EU countries of destination there is only data for some tertiary ISCED levels; therefore, they are accounted for when disaggregating data by ISCED level, but not when choosing the Eurostat aggregate for ISCED levels 5 to 8 (in which the country appears as missing data).

Degree mobile students are broadly gender-balanced (50.4% female in 2023), slightly more so than the overall tertiary student population (54.8% female), with notable variation by region of origin (see Annex 2 for details).^{41 42 43}

2.1.3. Perceptions of imbalance and related challenges in degree mobility

Study question	In what way do different actors (Member States, stakeholders, institutions, international/European organisations) consider current mobility as imbalanced and what are the (social, economic, political and cultural) challenges they identify stemming from this imbalance?
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2.1.3.1. Perspective of EU and international actors

Evidence and policy positions converge on a key concern: imbalanced degree mobility, especially when followed by graduate retention, risks undermining regional cohesion within the EU and amplifying global inequalities, despite the individual and systemic benefits mobility can generate.

The systemic literature review shows that, in recent years, key European and international organisations have been increasingly emphasising the **asymmetries in degree-mobile student flows across European countries and regions**, often framing these imbalances in terms of their political and economic impacts.

Ministers in the **EHEA Tirana Communiqué (2024)** explicitly mandate work towards more balanced mobility and an action plan to stimulate inclusive, greener mobility-reflecting the view that current patterns are not evenly distributed and may disadvantage parts of the EHEA⁴⁴.

Although **intra-EU mobility** is underpinned by the principle of free movement and contributes to individual opportunities and European integration, Eurydice analysis has documented its uneven territorial impacts: mobility flows follow a predominantly East-to-West and South-to-North pattern, and the economic benefits tend to concentrate in receiving Member States, particularly where degree-mobile students transition into long-term labour market participation in the destination country⁴⁵.

Though not focusing exclusively on learning mobility, EU institutions have recently drawn attention to the negative implications of imbalanced intra-EU mobility of talent

⁴¹ Eurostat indicators are collected by sex (female, male) and not by gender (women, men). Therefore, this report uses the balance between female and male students as proxy for gender balance. Eurostat does not account for other non-binary options.

⁴² Distribution of mobile students from abroad enrolled at education level by sex (Eurostat, [educ_uae_mobs04](#), 2025).

⁴³ Distribution of students enrolled at tertiary education levels by sex (Eurostat, [educ_uae_enrt04](#), 2025).

⁴⁴ *Tirana Communiqué*, EHEA Ministerial Conference, 29-30 May 2024, European Higher Education Area. Available at: <https://ehea.info/Immagini/Tirana-Communique.pdf>

⁴⁵ Jakobsen, L.B. and Crosier, D. (2018). Focus on: Is one country's brain gain another one's drain? Eurydice, EACEA. <https://eurydice.eacea.ec.europa.eu/news/focus-one-countrys-brain-gain-another-ones-drain>

for regional development and economic cohesion. The European Commission and Committee of the Regions have highlighted⁴⁶ that many eastern and southern EU states struggle to retain talent, ranking among the world's least able to do so. The result is a talent concentration in north-west Europe, while other areas face skill shortages – a pattern at odds with the EU's goal of cohesion.

From a macro-economic perspective, imbalanced intra-EU student mobility – combined with subsequent labour mobility (student retention after graduation) – can reinforce “brain gain” hubs and “brain drain” peripheries, potentially undermining equal opportunity across the Union (for more details on international student retention rates across different EU countries, see section 2.1.8).

Mobility between the EU and non-EU countries offers distinct challenges and dynamics. So far, the EU is a major global destination for degree-mobile students from third countries, often those with lower average income levels than the lower-income EU Member States themselves. These flows may generate benefits for EU host countries such as tuition fees and a potential pool for the national labour market, yet it may contribute equally to skills shortages and development gaps in third countries.

International organisations such as the OECD emphasised persistent imbalances in degree-mobile student flows both within Europe and globally. The OECD⁴⁷ notes that while many countries have implemented reforms to encourage internationalisation, disparities remain. Furthermore, despite growth in international student mobility between 2018 and 2022, the composition of host and origin countries has remained largely unchanged. Students from lower-GDP countries still account for only 1–2% of total tertiary enrolments in OECD countries and predominantly move towards wealthier destinations, a pattern particularly relevant for EU–non-EU mobility, where the risks of sustained brain drain for sending countries are more acute⁴⁸.

The OECD recognised that degree mobility carries both risks and opportunities for sending countries, without differentiating between EU and non-EU contexts. While there is the potential negative effect of lost talent (brain drain) if degree-mobile students remain in the host country after graduation. On the other hand, degree mobility can also generate significant benefits for the countries of origin:

- Returning graduates, or those who maintain strong links with their home countries, can contribute to knowledge absorption, technology upgrading, and capacity building. Through tacit knowledge gained abroad and shared via personal networks, they can support their home countries' integration into global knowledge and innovation systems.
- Research further indicates that the number of students studying abroad is a strong predictor of future flows of scientists in the opposite direction, providing evidence

⁴⁶ European Parliament resolution of 13 November 2019 on the mobility of third-country nationals with legal EU residence (2018/2517(RSP)). Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52019IR4645&from=EN>

⁴⁷ OECD. (2023). *Education at a Glance 2023: OECD Indicators*. <https://doi.org/10.1787/e13bef63-en>.

⁴⁸ De Wit, H., & Jones, H. (2018). Inclusive Internationalization: Improving Access and Equity. *International Higher Education*, 94, 16–18. DOI: <http://dx.doi.org/10.6017/ihe.2018.94.10521>

of cross-border circulation of skilled labour⁴⁹. Moreover, student mobility has been shown to shape international scientific cooperation networks more profoundly than either a shared language or scientific proximity⁵⁰.

2.1.3.2. Perspectives of Member States

Concerns about imbalanced degree mobility are expressed by the minority of countries: certain receiving countries regard rising inflows as unsustainable, while some sending countries emphasise risks of brain drain and talent loss.

Imbalanced degree mobility has been a concern of a few receiving countries that experienced political, financial, and capacity pressures linked to what they perceived as excessive inflows of international students⁵¹. This concern crystallised in the Bucharest Communiqué (2012)⁵², which explicitly acknowledged that if intra-EU mobility imbalances became “unsustainable” in the view of at least one party, countries should jointly seek solutions, guided by the Mobility Strategy 2020. The subsequent Yerevan Communiqué (2015)⁵³ added a financial dimension by proposing grant and loan portability to create a “fair balance” of responsibilities: sending countries would cover living costs abroad, while receiving countries would cover tuition. Due to political controversy, technical complexity, and the non-binding nature of Bologna commitments, this idea was later abandoned.

Drawing on the evidence from the country reports, the current study identifies two main positions regarding intra-EU mobility imbalances: The first group consists of **receiving countries that highlight unsustainable inflows, financial burdens, and capacity strains**. The second group includes **sending countries that are primarily concerned with brain drain and talent loss**.

Table 2: Intra-EU learning mobility imbalance positions and key national concerns. (1st group of countries).

Position / stance on imbalance	Main concern or feature	Countries (as reported)
Net receivers concerned about inflows	Financial, capacity and quality pressures from large incoming cohorts and risk of workforce stability in certain fields	Denmark, Netherlands, Austria, French Community of Belgium
Net senders concerned about outflows	Brain drain, talent loss, low return rates	Bulgaria, Croatia, Greece, Romania, Slovakia

⁴⁹ Appelt, S. et al. (2015), “Which factors influence the international mobility of research scientists?”, OECD Science, Technology and Industry Working Papers, No. 2015/2, OECD Publishing, Paris, <https://doi.org/10.1787/5js1tmrr2233-en>.

⁵⁰ OECD. (2023). *Education at a Glance 2023: OECD Indicators*. <https://doi.org/10.1787/e13bef63-en>.

⁵¹ *Brain Drain Final Report (ESC41)*, European Students’ Union. Available at: <https://esu-online.org/wp-content/uploads/2021/03/Brain-Drain-final-report-ESC41-Google-Docs.pdf>

⁵² Bucharest Ministerial Communiqué of the European Higher Education Area, 2012: http://www.ehea.info/media.ehea.info/file/2012_Bucharest/67/3/Bucharest_Communique_2012_610673.pdf

⁵³ Yerevan Ministerial Communiqué of the European Higher Education Area, 2015: http://www.ehea.info/Upload/document/ministerial_declarations/YerevanCommuniqueFinal_613707.pdf

The **Netherlands, Denmark and Austria** exemplify the first position. All are net receivers and report structural challenges linked to imbalance, including pressure on public finances, housing shortages, workforce stability and quality concerns in higher education. Further details on these concerns can be found in Appendix 2. The second position is represented by the net sending countries **Bulgaria, Croatia, Greece, Romania, and Slovakia**. These countries explicitly frame imbalances in terms of **brain drain** and **talent loss**, especially when outward degree mobility is followed by low rates of return. Stakeholders from Romania and Croatia, for instance, identified “brain drain” as a significant challenge linked to the outflow of students pursuing full degrees in other EU Member States. Although comprehensive evidence remains limited, concerns centre on the observation that a substantial proportion of these students do not return after graduation but instead integrate into the labour markets of host countries or other Member States.

Beyond the two main positions outlined, others **adopt neutral positions, treating imbalances as manageable or as secondary**.

Table 3: Intra-EU learning mobility imbalance positions and key national concerns (2nd group of countries).

Position / stance on imbalance	Main concern or feature	Countries (as reported)
Imbalance not a strategic concern; focus on openness/internationalisation	Symmetry not a policy goal; priority on attracting students or maintaining exchanges	Germany, Hungary, Ireland, Lithuania, Luxembourg, Malta, Poland, Sweden
Imbalance recognised but low political salience (including cultural concerns)	Imbalances noted, but not a major policy driver; in Estonian case debate focuses on cultural implications of English-medium provision	Cyprus, Estonia, Finland, France

Several **receiving countries do not treat the imbalance as a strategic concern**, including **Malta, Ireland and Sweden**. National stakeholders from these countries indicated that large inflows are not generally perceived as a challenge, and that the issue of (im)balanced mobility holds relatively low priority on the political agenda. Similarly, some intra-EU mobility **net sending countries**, such as **Luxembourg, Poland, Hungary, Germany and Lithuania**, do not treat the imbalance as a strategic concern (see for more information Annex 2). While imbalances are noted in **France, Cyprus, and Finland**, balanced mobility only plays a marginal role in policy debates. In some countries where imbalance has low political salience, such as **Estonia**, debates focus less on numbers and more on the cultural implications of English-language programmes (e.g. for the status of the national language).

2.1.3.3. Institutional and stakeholder assessments

Student organisations and higher education institutions increasingly frame imbalanced degree mobility as a systemic risk: one-sided flows can fuel brain drain in sending regions while creating integration and capacity pressures in receiving institutions.

Beyond governments, various stakeholders in the higher education community have scrutinized mobility imbalances. Chief among them, student organisations have been vocal about the issue. The European Students' Union (ESU), representing students across Europe, identified challenges related to degree mobility patterns, including imbalances between countries and inequitable access to mobility, emphasising the need of reform. ESU observed that internationalisation policies can unintentionally foster brain drain when mobility is one-sided: if incoming students concentrate to a few countries for better opportunities without similar inflows to their home countries, the result is “an imbalance of mobility and brain drain instead of balanced mobility and brain circulation”.⁵⁴ ESU also emphasised the pattern emerging from available data of student migration from Southern and Eastern Europe toward the Western and Northern Europe.⁵⁵ To counter brain, drain, ESU suggested the following measures:

- “*Upward convergence*” of conditions across Europe – meaning improve the quality, funding, and student support in weaker systems so students are less compelled to leave.
- Degree mobility schemes that create joint programmes between traditionally sending and receiving countries, serving both as retention mechanisms and as drivers of brain circulation⁵⁶.

From the perspective of HEIs, imbalanced flows of degree-mobile students create potential challenges for both sending and hosting countries' institutions.

From the **institutional perspective in sending countries**, large outward mobility can translate into **a loss of human capital and financial resources**. When significant numbers of local students leave to earn degrees abroad and do not return, universities back home suffer decreasing enrolments and a “brain drain” of young talent. In addition to loss of financial resources, such selective out-migration of students leaves sending-country institutions with smaller cohorts and can exacerbate local skill shortages. University leaders in affected regions warn that this makes it harder to “link education, training and the economy,” undermining the mission of universities to drive regional innovation and development⁵⁷.

⁵⁴ “Annex on Brain Drain,” European Students' Union. Available at: <https://esu-online.org/policies/bm82-annex-on-brain-drain/>

⁵⁵ *Brain Drain Final Report (ESC41)*, European Students' Union. Available at: <https://esu-online.org/wp-content/uploads/2021/03/Brain-Drain-final-report-ESC41-Google-Docs.pdf>

⁵⁶ Annex on Brain Drain,” European Students' Union. Available at: <https://esu-online.org/policies/bm82-annex-on-brain-drain/>

⁵⁷ Shrinking populations are increasing brain-drain woes,” *Science|Business*, 25 September 2025, <https://sciencebusiness.net/news/research-and-innovation-gap/shrinking-populations-are-increasing-brain-drain-woes-widening>

From the perspective of HEIs in ‘net receiving countries’, **large numbers of incoming student pose challenges in terms of student integration, services, and housing.** When large numbers of students come from abroad, institutions face the task of integrating them into campus life. Many universities note “frequent social segregation” of international students – they may cluster among themselves and struggle to mix with local peers, though this effect is more often noted for credit mobile students than for degree mobile students⁵⁸. Addressing these challenges requires investment in mobility orientation, mentorship, language training and other support measures that foster interaction between domestic and international students. Access to affordable student housing is also an important enabling factor, although responsibility for housing provision often extends beyond higher education institutions to national, regional and local authorities.

2.1.4. Available data and remaining gaps for analysing balanced mobility

Study question	What data are available to analyse balanced mobility, and what are the data gaps?
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Data on inbound degree mobility flows is generally available at multiple levels of disaggregation. Some outbound mobility data is also available, but with less granularity. Only some countries have data on mobile graduates’ outcomes and retention.

This report mostly relies on data sources on degree mobility offering cross-EU comparability. However, it is important to consider that international databases (i.e. Eurostat, OECD, UIS) can publish data with two or three years of delay, compared to one or two in most national-level databases or statistical offices. The 29 country reports that accompany this report include national-level data sources if they offer additional information to what is already reported to international databases.

Cross-EU indicators can be disaggregated by gender, field of study, education (ISCED) level, and country of origin. Some datasets cover only students or only graduates, while others only consider inbound (but not outbound) mobility. The three main databases, UNESCO (UIS), OECD, and Eurostat, collaborate through the **UOE joint data collection** initiative,⁵⁹ which provides methodological alignment and data sharing. When one indicator is available through several of these databases, this report refers to Eurostat.

Eurostat provides annual data up to 2023 (2024 for some) on the number of degree-mobile students (*students from abroad*, in Eurostat’s terminology), degree-mobile

⁵⁸ López-Duarte, C., Maley, J. & Vidal-Suárez, M. Main challenges to international student mobility in the European arena. *Scientometrics* **126**, 8957–8980 (2021). <https://doi.org/10.1007/s11192-021-04155-y>

⁵⁹ Eurostat. (2025). *UNESCO OECD Eurostat (UOE) joint data collection – methodology*. [Link](#).

graduates (*graduates from abroad*) and credit-mobile graduates (discussed in section 2.2)⁶⁰. Data displayed at the European Higher Education Sector Observatory (EHESO) and in the Education and Training Monitor report is based on Eurostat (and Erasmus+ programme data).

Available Eurostat disaggregation variables are shown in the following table. Some notable data gaps are discussed in Annex 2, section 1.1.3.

In contrast, the **UNESCO Institute for Statistics (UIS)** data does capture data on both the inbound and outbound degree mobility rates (*internationally mobile students*), as well as the resulting net flow. These data are available up to 2023.

Table 4: Eurostat and UIS indicators on degree mobility, and their disaggregation variables.

Indicator	Disaggregation variables				
	Total number and/or % of all students	Gender	Education level (ISCED)	Field of study	Country of origin (for inbound) or destination (for outbound)
Eurostat: Mobile students (inbound)	Total / share of total enrolment	Yes	Yes	Yes	Yes (worldwide)
Eurostat: Mobile graduates (inbound)	Total / share of total enrolment	Yes	Yes	Yes	Yes (worldwide)
Eurostat: Mobile students / graduates (outbound)	Not directly available. Can be calculated only for intra-European (EU27+EFTA) mobility flows, using inbound mobility data from all other reporting countries.				
UIS: Mobile students (inbound)	Total / Share of total enrolment	Yes	No (tertiary level only)	No	No
UIS: Mobile students (outbound)	Ratio of total enrolment	Yes	No (tertiary level only)	No	No

Notes: Not all crossings between available disaggregation variables for a given indicator are possible. All available disaggregation variables are shown, or can be calculated, both as total number and as a percentage (distribution between the existing categories). Country of origin, when available, can be also found aggregated by country region. UIS data is only offered aggregated at tertiary education level (ISCED 5 to 8). UIS does not offer data disaggregated by individual countries of origin or destination but does offer some regional aggregates.

All relevant information offered in the **OECD** database (mainly mobile students and graduates by country of origin) can also be found at Eurostat or UIS and is therefore not used as a reference for this report. Nonetheless, OECD reports do offer valuable insights on specific aspect of learning mobility, such as graduate outcomes, which is discussed in later sections.

⁶⁰ For a definition of these concepts, see Glossary of terms at the beginning of this report.

Finally, the **Eurydice Mobility Scoreboard** provides monitoring of the degree of progress in key (mostly qualitative) indicators and the implementation status of selected good policy practices conducive to promoting learning mobility and reducing its potential barriers. It covers all EU27 countries, as well as a few other European countries, across six thematic indicators:

- Availability of comprehensive mobility information and personalised student guidance
- Length of compulsory foreign language instruction across all levels of full-time education
- Portability of student support (grants and loans) for degree and credit mobility
- Progress in adapting recognition practices to ensure the automatic recognition of qualifications from other European countries
- Implementation of the key principles of the European Credit Transfer and Accumulation System (ECTS) supporting international study mobility
- Measures to increase the participation of disadvantaged learners in mobility opportunities.

The **cross-country analysis of national-level data** collection on learning mobility shows a high degree of formal alignment with Eurostat and UIS reporting categories. However, despite overall alignment, significant cross-national differences persist regarding the granularity of available disaggregated variables, as well as the accessibility and user-friendliness of the data. Additionally, in national databases, data on outbound mobility and international graduates' retention is generally absent, or not comprehensive. These gaps are further discussed in Annex 2, section 1.1.3, including good practice cases for countries that have addressed them.

2.1.5. Country-level costs and benefits of student degree mobility

Study question	What are the costs and benefits for the sending country/region as well as the country/region hosting mobile students from abroad in economic, cultural, social, and political terms? What is the economic impact of student mobility for both the sending and the hosting country/region?
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2.1.5.1. For the host country

Where countries do conduct comprehensive cost–benefit analyses, results consistently show that post-graduation retention is the decisive factor: incoming degree mobility delivers net positive returns only when graduates remain and integrate into host labour markets.

A growing body of academic literature and EU-level policy analysis has identified a set of structural challenges specific to intra-EU degree mobility, which complicate the

pursuit of balanced mobility within the EHEA.^{61 62 63} One frequently cited issue concerns the asymmetric financial burden associated with publicly funded higher education systems, whereby host countries-particularly those with no tuition fee or with low-fee regimes-bear the cost of educating large numbers of mobile EU students without compensatory funding mechanisms at EU level⁶⁴. For example, foreign students made up large share of total student population in Austria, Denmark, and the Netherlands straining public university resources and local infrastructure (for more details, see the next sub-section). This tension between mobility rights and funding fairness remains unresolved. The European Court of Justice eventually allowed temporary quotas only if hosts proved that many inbound degree mobile graduates leave after graduation, risking local skill shortages⁶⁵.

The extent to which intra-EU student mobility results in perceived “free-riding” depends critically on how degree programmes-particularly English-taught programmes-are funded. The Netherlands illustrates this distinction clearly. Since EU students benefit from equal-fee treatment under EU law, and many English-taught bachelor’s and master’s programmes in Dutch universities remain largely publicly funded, the tuition fees paid by EU students cover only a fraction of the full cost of education, with the remainder financed by the Dutch state⁶⁶. In such cases, high inflows of EU students into English-taught programmes can generate fiscal pressures and be perceived as a form of free-riding, particularly when graduates do not remain in the host country after completion. By contrast, in Member States where English-taught programmes rely more heavily on cost-reflective tuition fees-the financial imbalance is significantly reduced, and hosting countries are more likely to experience net fiscal benefits⁶⁷.

Cross-EU mapping shows that formal restrictions on English-taught programmes are relatively limited, but **indirect “hidden” financial barriers** are widespread and often more consequential: in much of the EU, English-medium provision is not primarily restricted by law, but by funding and pricing models that function as a de facto barrier to participation. Country-by-country detail on regulatory limits and fee differentials is provided in Annex 2 (section 1.1.5).

Conversely, when mobile graduates do stay in the host country, it is the sending country that faces “brain drain,” losing highly educated talent and the benefit of its prior primary and secondary educational investments^{68 69}. Current EU policies lack any cost-sharing mechanism to balance these effects.

⁶¹ Hoogenboom, Alexander (2017), *Balancing Student Mobility Rights and National Higher Education Autonomy in the European Union*, Koninklijke Brill nv, Leiden, The Netherlands.

⁶² European Commission, EACEA, Eurydice. *The European Higher Education Area in 2024: Bologna Process Implementation Report*, published in April 2024. <https://ehea.info/Immagini/the-european-higher-education-area-in-2024-EC0224018ENN1.pdf>

⁶³ Matthias Geissler & Johannes König (2021) ‘See you soon?!’ Mobility, competition and free-riding in decentralized higher education financing, *Regional Studies*, 55:4,665-678, DOI: 10.1080/00343404.2020.1851023

⁶⁴ Fedotov, Dmitriy A. (2023), *Student Mobility and the Struggle over European Integration: The Lessons of the Bologna Process*, University of Toronto.

⁶⁵ Ferencz, I. (2015). Balanced Mobility Across the Board-A Sensible Objective?. In: Curaj, A., Matei, L., Pricopie, R., Salmi, J., Scott, P. (eds) *The European Higher Education Area*. Springer, Cham. https://doi.org/10.1007/978-3-319-20877-0_3

⁶⁶ Ministry of Education, Science, and Culture. Letter of 21 April 2023 from the Minister of Education, Culture and Science to the House of Representatives on managing the influx of international students in higher education.

⁶⁷ [Some EU countries](#)’ public universities charge tuition fees for programmes taught in English (or other foreign languages) even when programmes taught in the national language are tuition-free.

⁶⁸ Gérard, M. and Sanna, A. (2017). Students’ Mobility at a Glance: Efficiency and Fairness When Brain Drain and Brain Gain Are at Stake. *Journal of International Mobility*, 5(1), 43-74. <https://doi.org/10.3917/jim.005.0043>.

⁶⁹ Lars Bo Jakobsen and David Crosier (2018), *Focus on: Is one country’s brain gain another one’s drain*, Eurydice.

Cross-country analysis confirms that coverage and methodology vary widely: around half of EU Member States have produced economic analyses of incoming degree mobility within the past decade, typically as economic impact assessments or fiscal-return models rather than full cost–benefit analyses. A key limitation across most studies is that **analyses focus primarily on the benefit side** and do not systematically quantify the full public cost base, and **national studies rarely disaggregate results by EU/EEA versus non-EU student origin**, despite meaningful differences in policy regimes. Data limitations also constrain the analysis of costs and benefits below country level. Country-level analyses **usually do not permit a systematic breakdown of costs and benefits by education sector or sub-sector** (e.g. VET, higher education, adult education) or by cycle/level within higher education, nor by field-specific provision such as applied sciences. As a result, a country-level net benefit from degree mobility may coexist with financial pressure on specific sectors, institution types or fields – for example on the higher education sector's own financial sustainability – without this being visible in the available data. Addressing this gap through more granular data collection should be a priority for future monitoring. A comprehensive mapping of country-level studies and their methodologies is provided in Annex 2, section 1.1.5 and Annex 3.

Main categories of benefits identified across countries

A first category of benefits relates to **direct revenues from international students' educational expenditure**. EU countries' fee income from educational exports remains modest by international comparison.⁷⁰

A second, and more widely documented, benefit concerns **student consumption and related economic activity**. International students contribute to host economies through spending on housing, food, transport, and leisure, generating indirect and induced effects and associated tax revenues. These effects apply to both intra-EU and non-EU students, although their magnitude may differ depending on income sources and living arrangements. Additional spillover benefits include tourism and cultural exchange. Country-level evidence on student expenditure is detailed in Annex 2, section 1.1.5^{71 72 73}.

A third category of benefits arises **from labour market participation during and after studies**. **During their studies**, between one in three and one in four international students work in the EU, contributing to the labour supply particularly in the hospitality and retail sectors⁷⁴, as well as to public finances through taxes and social security contributions⁷⁵. EU students generally benefit from the same employment rights as

⁷⁰ OECD. (2022). International migration outlook 2022. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

⁷¹ Campus France. (2022). *L'impact économique des étudiants internationaux en France*. <https://www.campusfrance.org/fr/ressource/l-impact-economique-des-etudiants-internationaux-en-france>

⁷² Agenzia Nazionale ERASMUS+ INDIRE, *Università, nuova ricerca sull'impatto economico degli studenti Erasmus+ europei presenti in Italia*, 2025. [Link](#)

⁷³ Rīga Stradiņš University (2025). LASER pētījums par Latvijas augstākās izglītības sistēmu. Available at: https://www.rsu.lv/sites/default/files/imce/Zinas/laser_petijums_2025.pdf

⁷⁴ Etzo, I., Paci, R & Usala, C. (2025). Brain gain versus brain drain: the effects of universities' mobile students on territorial inequalities, *Regional Studies*, Vol 59/1, Available at: <https://www.tandfonline.com/doi/full/10.1080/00343404.2025.2481085#abstract>

⁷⁵ Barrioluengo, M. S., & Flisi, S. (2017). *Student mobility in tertiary education: institutional factors and regional attractiveness*. Publications Office of the European Union. doi:10.2760/675338. JRC108895

domestic students under EU free movement rules, with largely unrestricted access to the host-country labour market during their studies. Non-EU students, by contrast, are typically subject to national restrictions on working hours under their study permits – commonly capped at 20 hours per week in many Member States – which may limit their overall labour market contribution during the study period⁷⁶.

After graduation, the picture diverges more sharply between EU and non-EU students. EU graduates benefit from freedom of movement and may remain in the host country, return home, or move to another Member State without restriction. Non-EU graduates, by contrast, must transition from a student permit to a work or residence permit, a step that is not guaranteed and varies significantly in its conditions across host countries. International students who do remain in the host country post-graduation have long-term employment rates on par with those of labour migrants and well above those of migrants overall. Country-level evidence shows that where retention occurs, the fiscal effects can be substantial: in Estonia, international students and recent graduates contributed €23.5 million in taxes in 2022/23, more than double the amount recorded in 2019/20⁷⁷. Retention effects are particularly pronounced in high-demand fields such as ICT and STEM, where stay rates tend to be higher. As a result, attracting and retaining international students - in particular non-EU students with targeted skills profiles, given the additional policy levers available through immigration and integration frameworks - is increasingly integrated into skills, migration, research and innovation strategies⁷⁸.

Beyond immediate labour market effects, several countries highlight the **demographic dimension of incoming degree mobility**.^{79, 80} The attraction and retention of young, working-age graduates can partially offset population ageing and shrinking cohorts, and reduce expected labour shortages and slow down economic decline. While rarely quantified explicitly, this rationale features prominently in the national policies, especially in countries facing labour shortages, where the retention and integration of non-EU graduates in labour markets and society is seen as essential. Given that population ageing and shrinking cohorts are faced by most EU countries, relying on intra-EU labour supply is insufficient.

Finally, a range of **non-economic benefits** is frequently cited, including cultural diversity, internationalisation of higher education, global networks, soft power, and public diplomacy. In France, for example, international student recruitment is explicitly linked to diplomatic strategy⁸¹. However, such benefits are seldom operationalised or monetised and therefore remain largely outside formal cost–benefit frameworks.

⁷⁶ OECD. (2022). *International Migration Outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

⁷⁷ Republic of Estonia. Education and Youth Board. *The economic impact of international students on Estonia's labour market*, published on 09 September 2024. <https://harno.ee/en/news/economic-impact-international-students-estonias-labour-market>

⁷⁸ OECD (2025), *Education at a Glance 2025: OECD Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/1c0d9c79-en>.

⁷⁹ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

⁸⁰ Berlin Institute for Population Development. (n.d.). Demographic dividend. <https://www.berlin-institut.org/en/focus-areas/demographic-dividend>

⁸¹ <https://www.campusfrance.org/en/francophone-education-at-the-heart-of-france-s-diplomacy-of-influence>

Main categories of costs and pressures

On the cost side, several studies and policy debates emphasise **inflationary pressures**, particularly in the housing market. Increased student populations-often concentrated in specific cities or neighbourhoods-can exacerbate existing housing shortages and contribute to rising rents. Structural constraints on housing supply, combined with long planning horizons for student accommodation, mean that demand often outpaces supply. These challenges are widely reported across Europe and are expected to intensify, with the total student population projected to reach around 23.5 million by 2030/31, roughly half of whom may be international⁸². France⁸³, Netherlands⁸⁴, and Malta⁸⁵ provide illustrative examples where housing shortages are frequently cited by stakeholders as a key challenge associated with expanding incoming degree mobility.

Another recurring issue is **competition for access to high-demand programmes**, particularly in regulated or high-cost fields such as medicine. While higher tuition fees paid by non-EU students may cover marginal teaching costs, capacity constraints-including infrastructure limitations, access to mandatory traineeships and shortages of academic staff-can restrict rapid expansion. Regulatory caps on enrolment further limit institutional flexibility in some systems.

In countries offering free or **subsidised tuition**, most notably in the context of intra-EU degree mobility or publicly funded scholarship schemes, public investment in education may not be fully recouped unless graduates remain in the national labour market after completion of their studies. This dynamic differs from EU–non-EU degree mobility, where higher tuition fees are more frequently used to offset educational costs and reduce fiscal risk. In response, some countries have adjusted their tuition policies; for example, France introduced differentiated fees for non-EU students in 2018⁸⁶, with exemptions⁸⁷, explicitly aiming to better align public costs and expected returns. In addition to educational expenditure, further public costs may arise from international students' **access to non-educational public services**, such as healthcare or subsidised transport, which tend to be more salient in intra-EU mobility contexts. In Flanders (Belgium), for instance, social security and healthcare costs for international students (including both incoming EU and non-EU students) were estimated at €3,283 per student, amounting to nearly €213 million in total⁸⁸.

Cross-country analysis shows that some countries have also expressed concerns about the **potential misuse of student visa regimes** by incoming non-EU nationals, notably in cases of fictitious or non-genuine enrolment primarily aimed at gaining entry to the EU rather than pursuing studies. Such concerns have been explicitly raised in

⁸² ICEF monitor. *European destinations attracting more international students amid continuing housing challenges*, published on 29 January 2025. <https://monitor.icef.com/2025/01/european-destinations-attracting-more-international-students-amid-continuing-housing-challenges/>

⁸³ Prodirekt. *Education in France: plans for heightened costs for international students*, published 30 December 2023. <https://prodirektgroup.com/2023/12/30/education-in-france-more-expensive/>

⁸⁴ Based on interviews with country-level stakeholders.

⁸⁵ Ibid.

⁸⁶ Prodirekt. *Education in France: plans for heightened costs for international students*, published 30 December 2023. <https://prodirektgroup.com/2023/12/30/education-in-france-more-expensive/>

⁸⁷ <https://www.campusfrance.org/en/tuition-fees-France>

⁸⁸ De Witte, K., & Soncin, M. (2021). Do international classes pay off? A cost-benefit analysis of the internationalisation of higher education in Flanders. *Higher Education*, 82, 459–476. <https://doi.org/10.1007/s10734-021-00737-0>

Lithuania and Latvia, for example, where authorities and higher education institutions report the need for enhanced monitoring, verification, and compliance mechanisms to ensure the integrity of international student admissions and to manage the additional administrative burden this place on both governments and HEIs.

Evidence from countries conducting net-benefit or CBA-type analyses

Although limited in number, several countries have conducted more comprehensive assessments that explicitly compare costs and benefits or estimate net public returns. These studies consistently highlight **post-graduation retention as the decisive variable**. It is notable that none of these studies disaggregated the impacts by EU vs. non-EU origin of incoming students. Country-specific findings from Germany, Belgium (Flanders), France, Lithuania, Finland and Denmark are presented in detail in Annex 2, section 1.1.5 and Annex 3.

Together, the available cases suggest that **where retention is sufficiently high and public costs are explicitly modelled, incoming degree mobility can yield net positive outcomes for host countries**. However, the evidence base remains limited: the countries reviewed here are those that have chosen to conduct and publish such analyses, and methodological differences, varying time horizons, and divergent assumptions further limit cross-country comparability.

2.1.5.2. Gains for the sending country

Degree mobility can deliver significant gains for sending countries through skills upgrading, knowledge transfer and return migration, but the evidence base remains skewed toward documenting brain drain risks, with far fewer analyses systematically assessing student mobility benefits from the sending-country perspective.

Beyond potential costs, degree mobility can generate substantial benefits for sending countries, including strengthened human capital, skills development, and wider social, economic and international cooperation gains. However, the cross-country mapping shows that **dedicated cost-benefit analyses from the sending-country perspective remain rare**. Where national evidence exists, it more often focuses on the economic effects of skilled emigration (graduates) rather than on students as such, reflecting data availability and the difficulty of tracking student return pathways.

In cases where host countries cover part or all education costs-most notably within intra-EU degree mobility-or where students fully self-fund their studies abroad (more typical of EU-non-EU mobility), **sending countries may benefit when graduates return as qualified workers without having borne the cost of tertiary education**⁸⁹. The OECD notes that returnees can support knowledge absorption, technology upgrading and capacity building, contributing to integration into global knowledge

⁸⁹ Halterbeck, M., & Conlon, G. (2021). *The Costs and Benefits of International Higher Education Students to the UK Economy*. Universities UK International and Higher Education Policy Institute, <https://www.hepi.ac.uk/wp-content/uploads/2021/09/Summary-Report.pdf>

networks (i.e. brain gain)⁹⁰. Reflecting this logic, public expenditure on free or subsidised tuition for students from developing countries is classified as Official Development Assistance (ODA), under the assumption of return and development effects; in 2020, Germany and France were the largest providers of such ODA⁹¹.

Where national higher education systems face capacity constraints and funding cannot expand in line with demand, outward degree mobility can help **bridge gaps between educational supply and labour-market needs**, particularly in high-cost fields such as healthcare or STEM^{92,93}. Within the EU, this is most visible where study places in certain programmes are formally restricted: students from countries such as Germany or France frequently pursue medical degrees in other EU Member States with available capacity, benefiting from access to qualifications unavailable at home. From the receiving country's perspective, such inflows generate both opportunities - tuition income, capacity utilisation and potential human capital gains - and pressures on publicly funded systems, examined further in section 2.1.10. For EU–non-EU mobility from low- and middle-income countries, degree mobility may act as a temporary adjustment mechanism, mitigating skills shortages while longer-term capacity expansion is underway, and may contribute to poverty reduction and skills upgrading over time⁹⁴. This dynamic, however, must be weighed against the additional demand that non-EU student inflows place on EU university capacity.

Returning graduates frequently bring not only formal qualifications but also **transferable skills acquired abroad**, including language proficiency, intercultural competence and soft skills. Evidence from intra-EU mobility is more developed in this respect: for example, a 2025 impact study by the German Academic Exchange Service (DAAD) found that among over 350,000 German students undertaking credit mobility abroad between 2014 and 2020⁹⁵, large majorities reported improvements in intercultural competence, language skills and communication abilities. Such effects are associated primarily with short- to medium-term (credit) mobility and high return rates after degree mobility, which are more common within the EU^{96 97}.

⁹⁰ OECD. (2023). *Education at a Glance 2023: OECD Indicators*. <https://doi.org/10.1787/e13bef63-en>.

⁹¹ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

⁹² Medicine provides a particularly illustrative example. In countries where the supply of medical study places is limited (e.g. Germany, France), students often pursue degree studies in other EU countries. The host countries, in turn, benefit from this dynamic, as medical programmes offered in English or German are frequently subject to tuition fees (for more details, see section 3.1.11).

⁹³ European Commission. (2024). *Education and training Monitor 2024: Comparative report*. <https://op.europa.eu/publication-detail/-/publication/9637e78f-acc7-11ef-acb1-01aa75ed71a1>

⁹⁴ Kwak, J., & Chankseliani, M. (2024). International student mobility and poverty reduction: a cross-national analysis of low- and middle-income countries. *International Journal of Educational Research*, 128, 102456. <https://doi.org/10.1016/j.ijer.2024.102458>

⁹⁵ This study included credit mobility, though the benefits mentioned in this paragraph are equally applicable to degree and credit mobility.

⁹⁶ German Academic Exchange Service. (2025). *DAAD Strategy*. https://static.daad.de/media/daad_de/pdfs_nicht_barrierefrei/der-daad/wer-wir-sind/daad_strategy.pdf

⁹⁷ Tiessen, R. et al. (2018). Expanding our understanding of ethical considerations in North-South student mobility programs: Insights for improved institutional practice. *Journal of global citizenship and equity education*, 6(1), 1-21.

At the same time, available evidence highlights potential costs for sending countries, which are more frequently documented than benefits:

Risk of **brain drain**, particularly when outward degree mobility—most often EU–non-EU mobility—results in long-term or permanent emigration. In such cases, sending countries may face losses in public investment and foregone tax revenue. Where graduates do not return to the sending country and do not remain in the country of study, they may move to a third country – a pattern that is largely untracked in current EU data systems. The EUROGRADUATE survey, a European Commission initiative currently covering 18 countries, represents the most developed EU-level effort to track graduate pathways – including international mobility after graduation – but its coverage remains partial and it does not specifically track the return rates of degree-mobile students to their country of prior education⁹⁸.

Reduced enrolment in domestic higher education systems may also **limit economies of scale and weaken institutional sustainability**, particularly in smaller systems with declining youth cohorts. While this effect is acknowledged in policy discussions, empirical evidence remains limited, and it will be examined further in the following section.

2.1.6. Student and HEI-level costs and benefits

Study question	What are the costs and benefits of degree mobility for individuals and for higher education institutions? How does degree mobility affect higher education institutions' strategies (for example for recruitment of teachers, curriculum design, language of instruction, research cooperation)?
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2.1.6.1. For mobile individuals

Evidence points to a clear but uneven advantage for mobile graduates: international study is associated with higher earnings, better employment prospects, and the accumulation of “mobility capital,” yet these gains come alongside substantial financial, administrative, and social costs that can significantly limit access—especially for lower-income and more vulnerable students.

Potential benefits of degree mobility for learners

Evidence mostly suggests modest gains in post-graduation earnings and personal development for mobile graduates, when compared with non-mobile graduates⁹⁹. Mobile graduates tend to receive higher income, are less likely of being unemployed,

⁹⁸ EUROGRADUATE 2022 Comparative Report: *Careers, Competences and Values of European Higher Education Graduates in 2022*. Coordinated by DZHW on behalf of the European Commission. <https://www.eurograduate.eu>

⁹⁹ European Commission website, accessed on 05 May 2025. *International student mobility*. https://joint-research-centre.ec.europa.eu/projects-and-activities/education-and-training/international-student-mobility_en

and enjoy a higher social status at home or abroad^{100,101,102} (It is notable that Norwegian evidence indicates a more nuanced pattern in which internationally mobile graduates experience slightly higher unemployment rates, but higher earnings once employed)¹⁰³. The combination of these characteristics can lead to what Murphy-Lejeune¹⁰⁴ calls “**mobility capital**” suggesting that previous mobility experiences can increase the chances of engaging in future international opportunities. Therefore, mobility can shape how graduates approach their job search and relocation decisions, ultimately affecting their outcomes in the labour market¹⁰⁵. Though it is difficult to establish cause-and-effect relationships on what factors lead to these outcomes, some of them include:

- **Accessing in-demand programmes** that might not be available or be harder to access in the country of origin (due to capacity limits and/or high academic access requirements).¹⁰⁶
- **Accessing prestigious institutions** that are a reference in the field of interest of the student, offering their graduates a competitive advantage.
- Gaining **life experiences** and personal growth, including soft skills such as intercultural competence, adaptability, problem-solving, collaboration, and language proficiency.^{107,108,109,110}
- Learning new **languages**.
- Post-graduation **access to a labour market** with lower unemployment or higher average wages than the country of origin.

In addition to these longer-term benefits, mobility can also yield immediate **advantages during the study period**. These include:

- In some cases, **lower tuition fees** (depending on the countries of origin and destination), particularly when accessing the host education system under the same conditions as local students, or when opting for private HEIs in countries of lower overall cost of living.

¹⁰⁰ Gérard, M., & Sanna, A. (2017). Student mobility at the glance: Efficiency and equality in the face of brain drain and brain gain. *Journal of International Mobility*, 5, 43-71. <https://shs.cairn.info/journal-of-international-mobility-2017-1-page-43?lang=en>

¹⁰¹ Di Pietro, G. (2023). Student Characteristics and Barriers to International Mobility: Evidence from the European Union, *European Education*, 55(2), 123-136. <https://doi.org/10.1080/10564934.2023.2278765>

¹⁰² Burmann, M., & Delius, A. (2017). *Student Mobility in tertiary education*. In S. Till Braun et al. (Eds.), Info DICE REPORT: Fostering the integration of immigrants. Info Institute.

¹⁰³ Wiers-Jenssen, J. (2011). Background and Employability of Mobile vs. Non-Mobile Students. *Tertiary Education and Management*, 17(2), 79–100. <https://doi.org/10.1080/13583883.2011.562524>

¹⁰⁴ Murphy-Lejeune, E. (2002). Student Mobility and European Identity: Erasmus Students as a Specific Europeanised Group. *Journal of Educational Media, Memory and Society*, 7(2), 35–58.

¹⁰⁵ Knutsen et al. (2024). Impact of international student mobility on international profile of jobs. *Higher education*. <https://doi.org/10.1007/s10734-024-01267-1>

¹⁰⁶ OECD. (2024). *Education at a Glance 2024: OECD Indicators*. OECD Publishing. <https://doi.org/10.1787/c00cad36-en>.

¹⁰⁷ European Commission webpage. *International student mobility*, accessed on 10 May 2025. https://joint-research-centre.ec.europa.eu/projects-and-activities/education-and-training/international-student-mobility_en

¹⁰⁸ German Academic Exchange Service. (2025). DAAD Strategy. https://static.daad.de/media/daad_de/pdfs_nicht_barrierefrei/der-daad/wer-wir-sind/daad_strategy.pdf

¹⁰⁹ Tiessen, R. et al. (2018). Expanding our understanding of ethical considerations in North-South student mobility programs: Insights for improved institutional practice. *Journal of global citizenship and equity education*, 6(1), 1-21.

¹¹⁰ Chellaraj, G. (2019). *The Economics of International Student and Scholar Mobility: Directions for Research*. World Bank Policy Research Working Paper 8848. <https://ssrn.com/abstract=3384382>

- In specific situations, **lower cost of living** throughout the studies (depending on the countries of origin and destination).

Despite the benefits, student mobility also entails a range of **costs-financial, administrative, and social**-that can disproportionately affect certain groups of students. While some of these costs are common to most mobile students, others are specifically linked to legal status, notably for non-EU (third-country) nationals. These costs can be summarised as follows:

- **Costs specific to non-EU (third-country) students, notably visa-related costs** (for third-country nationals). These include both direct processing costs and additional financial requirements, such as proof of sufficient funds for the full academic year secured upfront^{111, 112, 113}.
- Higher **admission** costs, which may affect both EU and non-EU students, depending on destination-country rules and institutional practices. These include: 1) the requirement of passing a national mandatory access exam (which may require studying a national curriculum different from the sending country's) or a specific international admissions exam (which can require the payment of additional fees)¹¹⁴, 2) additional administrative requirements to get prior studies recognised (particularly for ISCED 7 and 8), which can require costly professional translation services and lengthy administrative processes, and 3) application fees, which some universities¹¹⁵ require before the student's dossier can be even considered.
- In some cases, **higher tuition fees** due to differing legal status (e.g. EU vs non-EU citizen tuition fees) than local students and/or moving to a more expensive country.
- Potentially, **higher cost of living**, affecting both EU and non-EU mobile students, not only due to differences in average cost of living between the origin and destination countries, but also to the additional costs linked to studying abroad, such as additional **insurance** requirements, higher **travel expenses**, and missed access to family resources, national scholarships, or social benefits (e.g. healthcare, childcare, disability support) available in the country of origin¹¹⁶. These factors combined can deter students from lower-income backgrounds or with health concerns from studying abroad¹¹⁷.

¹¹¹ Prodirekt. *Education in France: plans for heightened costs for international students*, published 30 December 2023. <https://prodirektgroup.com/2023/12/30/education-in-france-more-expensive/>

¹¹² The Pie. (2024, January 4). *France set to hike costs for international students*. <https://thepienews.com/france-immigration-law-has-implications-for-intl-students/>

¹¹³ Le Parisien. (2023, December 20). *Loi Immigration : combien doivent déboursier les étrangers pour étudier chez nos voisins européens ?* <https://www.leparisien.fr/societe/loi-immigration-combien-doivent-debourser-les-etrangers-pour-etudier-chez-nos-voisins-europeens-20-12-2023-GQT4PSWB5RE25FCVNYTLMC2LBU.php>

¹¹⁴ [https://www.europarl.europa.eu/RegData/etudes/etudes/join/2014/529057/IPOL-CULT_ET\(2014\)529057_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/etudes/join/2014/529057/IPOL-CULT_ET(2014)529057_EN.pdf)

¹¹⁵ <https://www.sciencespo.fr/admissions/en/graduate/applications-fees/>

¹¹⁶ Fang, C., & van Liempt, I. (2020). 'We prefer our Dutch': International students' housing experiences in the Netherlands. *Housing Studies*, 36(6), 822–842. <https://doi.org/10.1080/02673037.2020.1720618>

¹¹⁷ OECD. (2024). *Education at a Glance 2024: OECD Indicators*. OECD Publishing. <https://doi.org/10.1787/c00cad36-en>.

- Costs linked to **insufficient language skills**¹¹⁸, including the cost of additional language tuition and lost opportunities (student jobs, internships, professional networks) due to language barriers. These costs disproportionately affect lower-income students and are most acute where the host-country programme is taught in a non-native language.
- For returning mobile graduates, **limited** administrative and labour market **recognition of degrees** in the country of origin, which may delay or complicate further education or employment^{119 120}. Intra-EU graduates can draw on Bologna Process tools (the Diploma Supplement and ENIC/NARIC networks), but recognition is not always automatic and processes differ by country¹²¹. For non-EU graduates, recognition is more cumbersome, relying on bilateral agreements or lacking a predictable standard process in many countries. The UNESCO *Global Convention on the Recognition of Qualifications* (in force 2023) remains partially ratified and its implementation is ongoing¹²².
- **Emotional and social costs**, which may affect mobile students regardless of legal status. These include feelings of isolation and difficulties integrating into unfamiliar academic, social, and cultural environments. Challenges related to adapting to new teaching and assessment methods, social norms, language barriers, and experiences of discrimination or racism can negatively affect both mental health (e.g. anxiety and depression) and academic performance^{123 124}.

2.1.6.2. For host HEIs

International degree mobility has increasingly positioned HEIs as strategic actors balancing public missions and market logics, generating significant financial, academic, and reputational gains while simultaneously exposing institutions to operational strain, financial vulnerability, and strategic trade-offs that are reshaping curricula, staffing, and the overall orientation of higher education systems.

While public and private for-profit higher education institutions pursue distinct missions in relation to national students—ensuring the right to education versus generating profit—the distinction is less clear in the case of international students. Public institutions, in many systems, are permitted and sometimes encouraged to frame international

¹¹⁸ Di Pietro, G. (2023). Student Characteristics and Barriers to International Mobility: Evidence from the European Union, *European Education*, 55(2), 123-136. <https://doi.org/10.1080/10564934.2023.2278765>

¹¹⁹ Shields, R. (2013). Globalization and International Student Mobility: A Network Analysis. *Comparative Education Review*, 57(4), p. 609-636. <https://doi.org/10.1086/671752>

¹²⁰ Wulz, J., & Rainer, F. (2015). Challenges of Student Mobility in a Cosmopolitan Europe. In: Curaj, A., Matei, L., Pricopie, R., Salmi, J., Scott, P. (Eds.), *The European Higher Education Area*. Springer, Cham. https://doi.org/10.1007/978-3-319-20877-0_3

¹²¹ https://europa.eu/youreurope/citizens/education/university/recognition/index_en.htm

¹²² <https://www.unesco.org/en/higher-education/global-convention>

¹²³ Farrugia, C., Bhandari, R. (2020). Global Trends in Student Mobility. In: Teixeira, P.N., Shin, J.C. (Eds.). *The International Encyclopedia of Higher Education Systems and Institutions*. Springer. https://doi.org/10.1007/978-94-017-8905-9_231

¹²⁴ Rickert, A. C. (2025). Postpandemic potential: Ready for the new era of international student enrolment. *Journal of International Students*, 15(5), p.81-96. <https://doi.org/10.32674/ca57zd88>

admissions in cost–benefit terms, whereas the notion of higher education as a public service is generally applied only to nationals and permanent residents.

The available evidence points to the following **key benefits of inbound degree mobility for HEIs of host countries**:

- Cross-country analysis indicates that the expansion of foreign-language programmes and the recruitment of incoming degree-mobile students are widely perceived by HEIs as a **strategic opportunity to diversify income sources and mitigate the effects of declining domestic student cohorts**. For public HEIs, this applies primarily to students from non-EU countries, as EU students must be treated equally to domestic students under EU law and therefore do not generate additional fee income in low- or no-tuition systems; for private HEIs, this opportunity extends to students from any country. This is particularly evident in countries facing significant demographic decline, where attracting international students has become central to maintaining programme viability and institutional capacity (see Annex 2 for country examples).
- Increased **revenue** at HEIs above the marginal cost of additional students. A higher overall number of students improves economies of scale at HEIs by spreading fix costs (e.g. infrastructure building and maintenance, administrative services, governance) over a larger number of tuition-paying students, especially if they would operate below full capacity without the foreign students¹²⁵. This revenue effect is most pronounced for non-EU students: a majority of European systems charge higher fees to non-EU students as a policy instrument explicitly used to raise revenue, while EU/EEA students are generally subject to the same fee rules as domestic students¹²⁶. Intra-EU degree mobile students, by contrast, contribute to revenue primarily through economies of scale rather than differential fee income¹²⁷.
- **Increased academic staff** (approximately proportional to the enrolment increase) allows for increased overall research output for each HEI and for the country, facilitating a critical mass on research projects that are only possible with large research teams. Some universities explicitly include in their mission the objective to grow student numbers – **including both intra-EU and non-EU international students** – so as to leverage scale, hire more staff, and increase research output¹²⁸.
- Depending on national admission rules, access to a larger pool of applicants – **whether from other EU Member States or from third countries** – can allow more prestigious institutions to **increase their selectivity**, potentially increasing the average academic performance of their students and therefore reinforcing the perceived institutional prestige. Research shows that international students

¹²⁵ OECD. *Tuition fee reforms and international mobility-policy brief*, published on 15 May 2017. https://www.oecd.org/en/publications/tuition-fee-reforms-and-international-mobility_2dbe470a-en.html

¹²⁶ OECD (2025), *Education at a Glance 2025: OECD Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/1c0d9c79-en>.

¹²⁷ <https://www.nuffic.nl/sites/default/files/2023-05/factsheet-international-students-2023.pdf>

¹²⁸ University College Cork Mission Based Performance Compact 2018–2021, Higher Education Authority Ireland, University College Cork. Available at: <https://hea.ie/assets/uploads/2017/04/University-College-Cork-Mission-Based-Performance-Compact-2018-2021.pdf>

provide opportunities for institutions to enrich their academic environment and reputational standing-implicitly supporting increased selectivity and prestige in recruiting top candidates¹²⁹.

- By increasing the diversity of its students, HEIs can enrich the academic environment, promoting the exchange of ideas and worldviews, building interconnectedness among different cultures. This benefit applies to both intra-EU and non-EU inbound mobility, though the nature of the diversity contribution differs: intra-EU mobility brings cultural and linguistic diversity within a broadly shared regulatory and values framework, while non-EU mobility introduces a wider range of educational backgrounds and international perspectives. This diversity can also enhance the quality of education and fosters international collaboration¹³⁰. Attracting international students can also be a lever for HEIs to increase their 'internationalization at home'¹³¹, not just for the international social environment it creates for students, but also for the incentives it creates for the internationalization of the curriculum.

Furthermore, evidence also confirms a number of **costs that host HEIs experience as a result of international degree mobility**:

- Processing the **administrative complexity** and **support needs** specific to foreign students can require additional resources from the host institution. Many HEIs have dedicated internationalisation offices, maintaining their institution's capacity to absorb international students and promoting its attractiveness. While this may provide positive returns in terms of increased mobile student numbers, it is an **additional fixed cost** separate from programme operational expenses. These pressures are amplified by sudden or unexpected influxes of students and by external shocks (such as humanitarian crises or pandemics), which can expose gaps in support systems for international students^{132 133}.
- A financial risk (rather than a cost) can result from HEIs' overreliance on international students' tuition fees, as they become **vulnerable to changes in migration policies**, whether triggered by temporary emergencies, capacity-driven policy changes, or broader geopolitical disruptions. Recent examples span travel restrictions during the pandemic, national inflow caps in several EU

¹²⁹ Okai, Lawrence & Mandayam, Gokul. (2024). The Importance of International Students in the United States. *International Journal of Studies in Education and Science*. 5. 304-326. 10.46328/ijses.108.

¹³⁰ Council of Europe Parliamentary Assembly. *Student mobility: Report Doc. 13715*, published on 19 February 2015. <https://pace.coe.int/en/files/21568/html?utm>

¹³¹ EAIE. (2018). *Internationalisation at Home in practice*. <https://www.eaie.org/resource/internationalisation-at-home-practice.html>

¹³² Streitwieser, B. & Brück, L. (2025). Competing motivations in Germany's higher education response to the "Refugee Crisis". *Refuge: Canada's Journal on Refugees*, 34(2), 38-51. <https://doi.org/10.7202/1055575ar>

¹³³ Roshid, M. N. et al. (2023). Interrogating higher education's responses to international student mobility in the context of the COVID-19 pandemic. *Heliyon* 9(e13921). <https://doi.org/10.1016/j.heliyon.2023.e13921>

countries, US student visa policy changes in 2025, Brexit, and the war in Ukraine (see Annex 2 for details).^{134, 135, 136, 137, 138, 139}

As a result of the financial and institutional pressures linked to these costs and benefits, the internationalisation of higher education, including degree mobility, has significantly influenced the strategic approaches of higher education institutions (HEIs) in the past 20 years. This is evident in various domains, including academic staff recruitment, curriculum design, language of instruction, and research collaboration^{140,141}. For example:

- To attract foreign students and to **diversify its offer** for local students, many HEIs offer programmes **in foreign languages**. This requires considerable institutional efforts, not only to adapt or translate teaching materials, but also in terms of staff training, additional staff hiring, and programme accreditation.
- To further attract foreign students, the **curricula may be adapted**, which entails trade-offs between a deeper coverage of local issues and a more internationally relevant curriculum. This is generally the case in social sciences and humanities, which are often heavily context-dependent, but can also occur in other fields (for example, by offering specialisation options that do not have a high -or sufficient- demand in the national labour market but do in other countries). This dynamic is most pronounced in the case of non-EU inbound mobility, where HEIs may tailor programmes to attract students from specific third-country markets with distinct labour market demands. Similarly, there can be **trade-offs** between adapting the educational supply to the demands of the national labour market or to the demand of international students, potentially leading to shortages in the former if decisions are fully decentralised at institution level, and each institution prioritises internationalisation. In a broader sense, an excessive focus on international students – **particularly from non-EU countries with markedly different labour**

¹³⁴ Financial times. *Almost half of England's higher education providers braced for deficit*, published on 8 May 2025. <https://www.ft.com/content/6dbdfc60-9d83-48ff-9b34-db3ddd08d5b1>

¹³⁵ Brooks, et al. (2024). International student mobility within Europe: responding to contemporary challenges. *Higher Education*, 88, p. 1663-1672.

¹³⁶ <https://www.dhs.gov/news/2025/08/27/trump-administration-proposes-new-rule-end-foreign-student-visa-abuse>

¹³⁷ Jeyaretnam, M. *Harvard's international students left in limbo amid legal battle with Trump administration*. Time Published on 23 May 2025. <https://time.com/7288422/harvard-university-international-students-trump/>

¹³⁸ Barcakova, M., & Launikari, M. *Geopolitical instability challenges student mobility in European higher education*. Laurea Journal, published on 24 June 2024. <https://journal.laurea.fi/geopolitical-instability-challenges-student-mobility-in-european-higher-education/#88085340:~:text=Marcela%20Barcakova%20%2C%20Mika%20Launikari>

¹³⁹ Pleschová, G. (2024). Uneven internationalisation of higher education in the European Union: a case study of two universities in Czechia and Slovakia. *European political science*. <https://doi.org/10.1057/s41304-024-00473-w>

¹⁴⁰ European Commission. *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of Regions on achieving the European Education Area by 2025*, published on 30 September 2020. <https://www.eu.dk/samling/20201/kommissionsforslag/kom%282020%290625/kommissionsforslag/1693971/2253770/index.htm>

¹⁴¹ Launikari, M. *Sustainable and competitive higher education – Benefits of international cooperation*. Laurea Journal, published 04 March 2024. <https://journal.laurea.fi/sustainable-and-competitive-higher-education-benefits-of-international-cooperation/#88085340>

market contexts – may distance HEIs from their **engagement** mission, particularly with regards to local communities¹⁴².

- Beyond curricula reform for individual programmes, some institutions are developing **joint and double degree programmes**, integrating modular learning, and offering micro-credentials to provide flexible and student-centred education pathways¹⁴³. In the EU context, the Erasmus+ European Universities initiative exemplifies this trend: Commission evidence shows these cross-border alliances have deepened structural cooperation in education, research, and innovation, embedding mobility into curriculum design by design¹⁴⁴ ¹⁴⁵. The rollout of joint European degree labels from mid-2026 signals a further shift towards programmes where mobility is integrated by design rather than treated as an add-on¹⁴⁶.
- In the context of growing internationalisation and increased cross-border competition for full-degree students, HEIs are incentivised to **adopt ever higher quality standards**¹⁴⁷, including internal quality assurance, national accreditation, and international certifications. Cross-border competition also incentivises HEIs to attract and retain international academic staff, with a 2024 Council Recommendation specifically calling for more attractive and sustainable academic careers¹⁴⁸.

¹⁴² Hunter, F., Ammigan, R., de Wit, H., Gregersen-Hermans, J., Jones, E., and Murphy, A.C. (2023). *Internationalisation in higher education: Responding to new opportunities and challenges. Ten years of research by the Centre for Higher Education Internationalisation (CHEI)*. EDUCatt.

¹⁴³ European Commission. *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of Regions on achieving the European Education Area by 2025*, published on 30 November 2020. <https://www.eu.dk/samling/20201/kommissionsforslag/kom%282020%290625/kommissionsforslag/1693971/2253770/index.htm>

¹⁴⁴ European Commission: Directorate-General for Education, Youth, Sport and Culture, PPMI, Grumbainaitė, I., Colus, F. and Buitrago Carvajal, H., *Report on the outcomes and transformational potential of the European Universities initiative*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2766/32313>

¹⁴⁵ [https://ec.europa.eu/transparency/documents-register/detail?ref=SWD\(2024\)291&lang=en](https://ec.europa.eu/transparency/documents-register/detail?ref=SWD(2024)291&lang=en)

¹⁴⁶ <https://education.ec.europa.eu/education-levels/higher-education/joint-european-degree/working-towards-a-joint-european-degree>

¹⁴⁷ Doda, S. et al. (2024). International student mobility: Pushing-pulling factors for international students. *Journal of educational and social research*, 14(6), 402-423. <https://doi.org/10.36941/jesr-2024-0182>

¹⁴⁸ Council of the European Union. *Council Recommendation on attractive and sustainable careers in higher education*, published one 24 November 2024. <https://data.consilium.europa.eu/doc/document/ST-15477-2024-INIT/en/pdf>

2.1.7. Push–pull conditions shaping student mobility and cross-country differences

Study question	What are the push and pull factors motivating students' choices for mobility (attractiveness of the country/region/city, language of teaching, housing availability, student services, capacity and attractiveness of higher education institutions, tuition fees, student funding and portability of loans, admission criteria, availability of and eligibility for attractive fields of study (e.g. STEM, medicine), labour market employability, national policy on automatic recognition of qualifications and prior learning)? How do the different Member States score on these various factors?
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Students' decision to pursue degree studies abroad are influenced by a combination of **'push factors'**, which drive them away from their home country, and **'pull factors'**, which attract them toward the host country^{149, 150, 151}. Though these factors will vary from student to student, aggregated trends can be analysed. Many of the following factors can be understood as both a push or a pull factor depending on the perspective; for example, attractive programme features, scholarship opportunities (more important for incoming non-EU students) or career expectations can be pull factors in the destination country and their absence be push factors in the country of origin. In the context of intra-EU/EEA student mobility (for additional factors mainly affecting non-EU students see Annex 2 – section 1.1.7), push and pull factors includes educational and academic, economic, factors related to policies and regulations, and social, cultural, and personal factors.

2.1.7.1. Educational and academic factors

Many students are attracted to degree mobility as a way to access programmes they might not otherwise be able to join in their home country, with institutional prestige and language of instruction as important academic factors guiding their destination preferences.

While all factors described in this section (2.1.7) are to some extent interconnected, academic factors have been identified by some studies as having the highest weight in the decision of engaging with a full-degree mobility abroad¹⁵². In this respect, students are pushed abroad when they face **limited opportunities for high-quality**

¹⁴⁹ Barrioluengo, M. S., & Flisi, S. (2017). Student mobility in tertiary education: institutional factors and regional attractiveness. Publications Office of the European Union. doi:[10.2760/675338](https://doi.org/10.2760/675338)

¹⁵⁰ Bhandari, R., C. Robles and C. Farrugia (2018), "International higher education: Shifting mobilities, policy challenges, and new initiatives", *Background paper prepared for the 2019 Global Education Monitoring Report*, Global Education Monitoring Report, UNESCO, <https://unesdoc.unesco.org/ark:/48223/pf0000266078>

OECD (2020), *Education at a Glance 2020: OECD Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/69096873-en>.

¹⁵¹ OECD (2025), *Education at a Glance 2025: OECD Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/1c0d9c79-en>.

¹⁵² Perez-Encinas, A. et al. (2021). Factors influencing student mobility: a comparative European study. *Studies in Higher Education*, 46(12), 2528-2541. <https://doi.org/10.1080/03075079.2020.1725873>

education, restricted programmes choice, or inadequate research infrastructure in their home countries, and pulled towards countries without these limitations.

Additional **pull factors** relate to the language of instruction, programme availability and selectivity, and institutional prestige and reputation:

- **Language of instruction.**

Some students are attracted by the opportunity to learn or improve their language skills by studying abroad, which benefits countries offering programmes in languages that have an international appeal, particularly in the labour market (e.g. English, French, Spanish, German, etc.). Others may be attracted by other factors, but value study destinations offering programmes in the languages they already speak. In this sense, countries offering a high percentage of full degrees in languages that foreign students speak have a clear advantage to attract international students, as shown in Table 5 in section 2.1.7.4 below¹⁵³. Country-specific data on English-taught programme numbers by country are provided in the Annex 2.

- **Countries with a high percentage of degrees in English** (such as the Netherlands, the Nordic countries, and Ireland).
- **Countries with languages shared by other EU members**

For example, French in France, Luxembourg and Belgium, German in Germany, Luxembourg and Austria, and Greek in Greece and Cyprus. Linguistic minorities can also take advantage of their language skills to study abroad, such as the Hungarian speaking minority in Romania or the Swedish speaking minority of Finland. Multiple gravity-model studies (cross-country, EU/Erasmus) find a statistically significant “common language” effect on bilateral international student mobility-i.e., countries that share a language send/receive more students to/from each other¹⁵⁴. For example, Belgium is among the top destinations for French-speaking degree-mobile students, and Austria is the most popular destination for German students^{155 156} (see Annex 2 for country-level figures).

- **Countries whose language of instruction (other than English) is widely spoken in third countries**

¹⁵³ OECD. (2022). International migration outlook 2022. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

¹⁵⁴ Michel Beine, Romain Noël & Lionel Ragot, The Determinants of International Mobility of Students, CEPII Working Paper No. 2013-30, September 2013, https://www.cepii.fr/pdf_pub/wp/2013/wp2013-30.pdf

¹⁵⁵ <https://curiexplore.enseignementsup-recherche.gouv.fr/pays/BEL/cooperation-internationale>

¹⁵⁶ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/01/PD25_034_21.html

For example, French connects France to large cohorts from Francophone Africa and the Near East; Spanish and Portuguese draw students from Latin America; Romanian attracts students from Moldova. Spain draws predominantly from Latin America & the Caribbean, and Portugal from Brazil and Portuguese-speaking African countries^{157 158}. (see Annex for detailed national data).

- **Programme availability and selectivity**

Difficulty in accessing certain programmes in the home country with high selectivity (when their capacity is considerably smaller than the demand for them), can be a push factor. This can be the result of a sudden spike in interest for an emergent professional field, or to structural underinvestment in highly demanded but relatively more expensive programmes such as those in the medical sciences. Availability of such programmes abroad then becomes a pull factor. As demonstrated in the following chapter, country-level evidence indicates that the high demand and strong competitiveness of medical study programmes in countries such as Germany and France (push factor), combined with the wider availability of such programmes in Central and Eastern European countries (pull factor), play a key role in West-to-East student mobility in this field (see section (2.1.10 for more details).

Besides programme selectivity, some fields of study may be simply unavailable in the home country, which is particularly evident in smaller EU countries with high outgoing mobility ratios (see Annex 2 for country data)¹⁵⁹.

- **Institutional prestige and reputation**

Students can be motivated to seek degrees abroad by the perception of some institutions offering a competitive advantage to their graduates, whether this is due to genuine academic excellence or a self-perpetuating cycle of perceived prestige leading to high selectivity, in turn facilitating higher average academic performance (Gutema et al., 2023)¹⁶⁰. Despite academic criticism and institutional alternatives¹⁶¹, for-profit international rankings remain used by students and families as markers of (or proxies for) academic excellence, though the extent to which they are a key determining factor in institution choice is debated¹⁶².

¹⁵⁷ <https://www.ciencia.gob.es/Noticias/2025/enero/informe-universidades-espanolas.htm>

¹⁵⁸ <https://www.dges.gov.pt/pt/pagina/nota-comunicacao-social-estatuto-de-estudante-internacional>

¹⁵⁹ UNESCO Institute for Statistics (2022). *Latest year available.

¹⁶⁰ Gutema et al. (2023). Exploring key themes and trends in international student mobility research – A systematic literature review. *Journal of Applied Research in Higher Education*, 16(3), p. 843-86. DOI 10.1108/JARHE-05-2023-0195

¹⁶¹ <https://national-policies.eacea.ec.europa.eu/eheso/benchmarking-tool-for-higher-education-institutions>

¹⁶² For example, a 2021 research paper on UK universities found that reputation was relevant, but this was not necessarily based on rankings.

Soysal, Y. N., Baltaru, R. D., & Cebolla-Boado, H. (2022). Meritocracy or reputation? The role of rankings in the sorting of international students across universities. *Globalisation, Societies and Education*, 22(2), 252–263. <https://doi.org/10.1080/14767724.2022.2070131>

2.1.7.2. Economic factors

Many degree mobile students are attracted towards countries with good post-graduation employment opportunities and relatively lower cost (of living and of education).

Economic push factors include low wage levels in home countries, limited financial returns on domestic qualifications, restricted access to scholarships and student funding, as well as comparatively high tuition fees relative to the quality of education.

Correspondingly, economic pull factors for degree mobile students include:

- **Free or subsidized tuition, and funding opportunities**

Access to free or heavily subsidised tuition in public higher education institutions of the country of destination (at least for EU students) is an important incentive. Even within the private higher education sector, differences in average tuition fees between countries can be considerable - in some cases up to tenfold - particularly where fees in the country of origin are higher than those available at the destination. Countries with a free or near-free tuition policy and with high shares of intra-European inbound mobility include Austria, Cyprus, Czechia, Denmark and Belgium. The reverse also holds: students from countries with free tuition have fewer financial incentives to study abroad (e.g. seven of the ten EU countries with the lowest outbound mobility ratio offer free or near-free tuition). National-level surveys in Germany (2025) and Czechia (2024) confirm this pattern, with low tuition consistently ranking among the top reasons cited by international students for their destination choice (see Annex 2 for detail).

Availability of scholarships to cover tuitions fees and/pr living expenses, student loans, and institutional support for international students is another factor similarly incentivizing or disincentivizing mobility inflows.

However, the role of tuition fees in attracting international students varies between intra-EU and non-EU degree mobility. For intra-EU students, who are often charged the same or similar fees as domestic students, tuition levels tend to play a limited role in mobility decisions. By contrast, for non-EU students—who are more frequently subject to higher, differentiated fees—high tuition levels can be perceived as a signal of academic quality and institutional prestige, particularly in countries with a strong international reputation. In this context, causality may also operate in the opposite direction: institutions that are already attractive to non-EU students may raise fees while maintaining selectivity, using the additional revenue to invest in research capacity, infrastructure, student services, and performance indicators measured by international rankings, thereby reinforcing a self-reinforcing cycle of prestige. In turn, high fees allow universities to increase their budget and, with it, its capacity to maintain ambitious research lines, build attractive infrastructure, provide student services, subsidize fees for high performing students, and, in general, improve the variables that international rankings measure, further increasing perceived prestige in a virtuous cycle.

- **Lower living expenses**

Relatively lower cost of living (particularly on housing, an issue further explored in the credit mobility chapter) can be a pull factor for both incoming degree and credit mobility, particularly if the quality of education is perceived as sufficient. For example, some CEE countries attract students from Western Europe by combining EU-recognised programmes in widely-spoken languages with considerably lower living costs (see Annex 2 for country examples).

- **Post-graduation employment prospects**

Degree mobility can be linked to the plans to remain in the host country after graduation, particularly if it is a country with higher employment rates, higher average salaries and/or better working conditions and career prospects¹⁶³. Cross-country data supports this association: countries with higher unemployment rates tend to attract fewer inbound degree-mobile students, suggesting that labour market conditions are one consideration among others for students pursuing education-based paths to migration (see Annex 2 for country-level evidence).

2.1.7.3. Factors related to policies and regulations

Key policies increasing the attractiveness of a country as study destination for non-EU students include easy recognition of foreign qualifications, and visas that allow students to work during their studies and for extended periods after graduation.

For both EU and non-EU students, **limited prospects to access specific professions**, due to administrative restrictions (e.g. in the case of regulated professions), can act as push factors beyond overall labour market demand for these professions.

On the other hand, attractive policies and regulations in the host country often function as **pull factors**. Notably, administrative and academic **admission requirements** for third country students, and in particular **recognition of foreign qualifications**. The Eurydice Mobility Scoreboard (2023)¹⁶⁴ provides a cross-country comparison of which countries have implemented good practices on the recognition of foreign qualifications (from other EHEA countries)¹⁶⁵. The findings highlight substantial differences between

¹⁶³ Hailat, K. Q., et al. (2020). An investigation of the push–pull factors influencing student selection of higher education: The case of Arabian Gulf students in the UK. *Journal of Public affairs*. <https://doi.org/10.1002/pa.2657>

¹⁶⁴ <https://national-policies.eacea.ec.europa.eu/mobility-scoreboard/higher-education-indicators/recognition-of-qualifications/2023>

¹⁶⁵ These include:

1. **National legislation** has been reviewed and, if necessary, modified to ensure that the principles of the [Lisbon Recognition Convention \(LRC\)](#) are respected
2. Higher education institutions (HEIs) or recognition bodies receive **clear guidance** on properly implementing the principles of the LRC
3. Recognition decisions are taken within a **four-month limit**.

systems that lack automatic recognition and implement only two of the five identified good practices, and those that have established automatic recognition policies, including for admission to programmes at the next level of study.

2.1.7.4. Social, cultural and personal factors

Data shows how the combination of geographical proximity and language of instruction explains a large share of degree mobile students' choice of destination country.

In terms of the social and cultural factors, limited opportunities for social mobility (e.g. high youth unemployment), discrimination or restrictive cultural norms (e.g. anti-LGBTQ+ discrimination) are often linked to push factors that might encourage students to seek education abroad. For instance, when local labour markets undervalue domestic qualifications, or when minority or migrant groups systematically face barriers in education or employment, students may perceive that staying home traps them in low-reward trajectories. The OECD notes that discrimination contributes to “horizontal inequalities,” affecting access to education, employment, and other social services¹⁶⁶. In university mobility research, “unfavourable social environment in home country” is frequently categorised as a push factor¹⁶⁷.

In contrast, opportunities for intercultural exchange and global networking¹⁶⁸, family and social expectations of higher-quality education abroad (which is associated with better employability and social capital)^{169, 170} are associated to pull factors. Studies demonstrate a strong positive association between **social capital, intercultural competence, and willingness to engage in mobility** or exchange programmes. Academic mobility acts as a vehicle of intercultural interaction and knowledge sharing, which in turn enhances the reputation and attraction of host institutions¹⁷¹.

Furthermore, in many European and non-European communities, parents or social groups perceive that obtaining a degree abroad confers higher prestige, better employability, and greater social capital. This expectation can translate into pressure

4. **Appeals procedures** are in place, and decided within a clear and reasonable time limit

5. Recognition practice in HEIs is **monitored by external quality assurance** in line with the European Standards and Guidelines 2015.

¹⁶⁶ OECD, Current Challenges to Social Mobility and Equality of Opportunity (OECD Papers on Well-Being and Inequalities No. 10, November 2022), https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/11/current-challenges-to-social-mobility-and-equality-of-opportunity_842ccc99/a749ffbb-en.pdf

¹⁶⁷ Fakunle, O. (2020). Developing a framework for international students' rationales for studying abroad, beyond economic factors. *Policy Futures in Education*, 19(6), 671-690. <https://doi.org/10.1177/1478210320965066> (Original work published 2021)

¹⁶⁸ Tiessen, R. et al. (2018). Expanding our understanding of ethical considerations in North-South student mobility programs: Insights for improved institutional practice. *Journal of global citizenship and equity education*, 6(1), 1-21.

¹⁶⁹ Császár, Z. et al. (2023). Changing geopolitics of higher education: economic effects of inbound international student mobility to Hungary. *Journal of Geography in Higher Education*, 47(2), 285–310. <https://doi.org/10.1080/03098265.2022.2045572>

¹⁷⁰ Hailat, K. Q., et al. (2020). An investigation of the push–pull factors influencing student selection of higher education: The case of Arabian Gulf students in the UK. *Journal of Public affairs*. <https://doi.org/10.1002/pa.2657>

¹⁷¹ Shen, W., Xu, X. & Wang, X. Reconceptualising international academic mobility in the global knowledge system: towards a new research agenda. *High Educ* 84, 1317–1342 (2022). <https://doi.org/10.1007/s10734-022-00931-8>

to emigrate educationally. Even within EU contexts, families with immigrant or minority backgrounds may place disproportionate weight on “foreign credentials” as markers of success or social advancement. Some higher-education mobility frameworks include “social prestige” or “reputation of institutions abroad” as explicit pull factors¹⁷².

Finally, **personal factors** also play an important role in motivating individuals to undertake degree mobility. Personal growth, aspirations for personal independence, adventure, and gaining global exposure or perspectives are among these key motivating factors^{173 174}. Research suggests that students from developing countries are more often driven by push factors (limited programme availability, lower quality, restricted employment prospects), while those from developed European countries tend to be driven by personal growth motivations (see Annex 2 for study details).

Several studies found that the size of bilateral student flows is significantly positively correlated to **geographical proximity** between the countries of origin and destination^{175, 176, 177, 178}. At a global scale, students tend to remain in their region of origin. Europeans represent the large majority of international students in European OECD countries¹⁷⁹. The strength of this relationship can be also observed when comparing Eurostat data on individual EU/EEA countries, showing that many of the top countries of origin of degree mobile students were not just within the same region, but coinciding with neighbouring countries.

Language of instruction is the dominant pull factor in several countries (e.g. Portugal, Romania, Belgium, Greece, France), while geographical proximity is decisive in others (e.g. Slovakia, Austria, Poland). In countries where national-language pull is limited, a large supply of English-taught programmes often compensates. Country-by-country breakdowns are presented in the table below and in the Annex 2^{180 181}.

¹⁷² Fakunle, O. (2020). Developing a framework for international students' rationales for studying abroad, beyond economic factors. *Policy Futures in Education*, 19(6), 671-690. <https://doi.org/10.1177/1478210320965066>

¹⁷³ Hovdhaugen, E. & Wiers-Jenssen, J. (2023). Motivation for full degree mobility: analysing sociodemographic factors, mobility capital and field of study, *Educational Review*, 75(2), 195-216, DOI: 10.1080/00131911.2021.1912712

¹⁷⁴ Calikoglu, A. (2018). International Student Experiences in Non-Native-English-Speaking Countries: Postgraduate Motivations and Realities from Finland. *Research in Comparative and International Education*, 13(3), 439-456. <https://doi.org/10.1177/1745499918791362> (Original work published 2018)

¹⁷⁵ Abbott, A. and M. Silles (2015), “Determinants of International Student Migration”, *The World Economy*, Vol. 39/5, pp. 621-635, <https://doi.org/10.1111/twec.12319>.

¹⁷⁶ Beine, M., R. Noël and L. Ragot (2014), “Determinants of the international mobility of students”, *Economics of Education Review*, Vol. 41, pp. 40-54. <https://doi.org/10.1016/J.ECONEDUREV.2014.03.003>.

¹⁷⁷ Didisse, J., T. Nguyen-Huu and T. Tran (2018), “The Long Walk to Knowledge: On the Determinants of Higher Education Mobility to Europe”, *The Journal of Development Studies*, Vol. 55/6, pp. 1099-1120. <https://doi.org/10.1080/00220388.2018.1475647>.

¹⁷⁸ Similarly, over 90% of foreign students in Korea and Japan originated from Asia, and 95% of those studying in Mexico were from America. See: Kaushal, N. and M. Lanati (2019), “International student mobility: Growth and dispersion”, NBER working paper series, <http://www.nber.org/papers/w25921>.

¹⁷⁹ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

¹⁸⁰ Including Cyprus' students.

¹⁸¹ For example, in Sweden the vast majority of Master's degrees are in English.

The following table provides a cross-country comparison of two of these key factors: geography and language of instruction. The table illustrates the varying degree to which these two variables explain mobile student's choice of destination.¹⁸²

Table 5: Share of degree mobile students (worldwide, from EU and non-EU countries), by country-of-origin characteristics (geographical proximity and/or shared language). Number of English-taught programmes.

Country of destination	International students as a share of total tertiary enrolment (%)	Share of incoming students from neighbouring countries (%)	Share of incoming students from countries with a common language (%) ¹⁸³		Share of incoming students from either neighbouring countries or countries with a common language (%)	Number of on-campus English-taught higher education programmes	
			Worldwide ¹⁸⁴	Intra-EU		2019	2024
EU27	8.4	N/A	N/A		N/A	15193	17081
Liechtenstein	85.8	n.d.	n.d.		n.d.	3	3
Netherlands	n.d. ¹⁸⁵	n.d.	n.d.		n.d.	1946	2104
Slovenia	9.5	n.d.	n.d.		n.d.	100	31
Portugal	12.0	1.7	70.3 (EU: 0)		72	385	459
Slovakia	11.9	69.1	14.4 (all EU)		69.1	69	122
Romania	6.3	39.9	61.7 (EU: 17.4)		66.5	106	152
Greece	3.1	65.2	57.50 (all EU)		65.2	277	234
Spain	4.0	19.3	46.0 (EU: 0)		64.1	1157	1027
Austria	19.4	62.3	47.0 (EU: 43.9)		64	380	338
Poland	6.7	60.4	0		60.4	515	642
Belgium	10.1	45.4	57.9 (EU: 40.6)		59.2	399	457
France	9.1	9.6	51.0 (0.9)		58.7	1020	1323
Croatia	3.6	58.0	52.2 (EU: 0)		58	42	66
Malta	23.8	23.4	30.5 (EU: 0.8)		53.9	18	247
Luxembourg	50.5	44.2	51.0 (EU: 43.7)		51	44	64
Ireland	11.0	4.9	41.4 (EU: 0.2)		41.4	2314	2595
Cyprus	20.2	41.1	37.1 (all EU)		41.1	485	450
Czechia	15.8	40.7	38.2 (all EU)		40.7	255	453
Bulgaria	8.4	35.1	5.5 (EU: 0)		35.1	130	84
Estonia	11.4	29.5	0.0		29.5	83	72
Denmark	10.1	25.6	14.6 (all EU)		25.6	492	328
Lithuania	8.8	22.2	0		22.2	329	295
Hungary	13.7	19.7	11.6 (all EU)		19.7	368	440
Latvia	12.7	14.6	0		14.6	124	141
Germany	12.0	12.5	7.2 (all EU)		12.5	1906	2269

¹⁸² Countries are ranked based on the fifth column from the left, the combined weight of the two variables.

¹⁸³ See Annex 2, section 1.1. for more details on which countries are considered in each case under this criterion.

¹⁸⁴ Including EU and non-EU students.

¹⁸⁵ For consistency and country comparison reasons only data from the same source – Eurostat – is provided here. Data on the Netherlands was missing from the Eurostat dataset.

Norway	4.1	12.2	8.9 (all EU)	12.2	500	355
Finland	8.5	10.6	0	10.6	485	457
Italy	4.2	10.4	1.9 (EU: 0)	10.4	831	1212
Sweden	7.0	7.4	6.8 (all EU)	7.4	933	1019
Iceland	9.6	0	0	0	57	85

Sources: Prepared by study team, data from Eurostat (1) and British Council (2).

- (1) Share of (incoming) degree mobile students from abroad, ISCED5-8, by county of origin (Eurostat, [educ_uoe_mobs03](#) & [educ_uoe_mobs02](#), 2023).
- (2) British Council & Studyportals. (2024). *Mapping English-taught Programmes Worldwide*. [Link](#).

Notes:

- Foreign students of unknown country of origin were not included in the calculation of the shares.
- Neighbouring countries are defined as bordering countries.
- Countries with a common language are defined as those where at least one of the languages of instruction in public tertiary education programmes of the country of destination (other than English) is widely spoken, or if the languages of the countries of origin and destination are mutually intelligible (see table in Annex 2, section 1.1.7). Only for Ireland and Malta, where English has co-official status, was this language considered as the basis for the calculation.

2.1.8. Post-graduation Mobility Choices, Labour Market Outcomes and Return Incentives

Study question	What are the motivating factors to stay in the host country/region after completion of the degree or moving back to home country/region or elsewhere? What is the labour market situation of graduates staying in the host country/region and those who leave? Are there any national incentives for students to come back to their country of origin?
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Though only a few countries gather systematic data on the retention and labour market outcomes of mobile graduates, those with the data point out to a wide disparity.

In general, academic studies show that many international students tend to stay and work in the country where they studied, and spending longer periods of time studying abroad seems to increase the chances that students decide to work abroad later¹⁸⁶.

Despite its importance, retention rates vary widely across OECD countries, ranging from around 60% in Germany to below 20% in several other EU countries five years

¹⁸⁶ Barrioluengo, M. S., & Flisi, S. (2017). *Student mobility in tertiary education: institutional factors and regional attractiveness*. Publications Office of the European Union. DOI:10.2760/675338. JRC108895

post-graduation. Country-level data from the OECD (2022)^{187 188} is presented in the Annex 2 (section 1.1.8), alongside a note on the availability and comparability of job-search visa schemes as a key policy lever.

Using 2021 OECD and Eurostat data¹⁸⁹ on the types of visas issued by country, it can be inferred that, on average for OECD countries, about one in three student permit holders changed their study visa for a different visa in subsequent years, which is a proxy for retention.

According to a 2018 study by the European Migration Network¹⁹⁰, about half of the countries in the study considered attracting and retaining international students as a policy priority, some with measurable time-bound targets on graduate retention or employment (see Annex 2 for country examples).

Systemic cross-country analysis showed that where national-level studies were conducted¹⁹¹, they show that graduate retention rates vary significantly across the EU/EEA, with one cluster of countries demonstrating moderate to high rates, whereas others reporting very low rates of international student's retention after their graduation.

¹⁸⁷ As a point of comparison more recent data from the German Federal Statistical Office estimated that 46% of students are still in Germany 10 years after starting their studies. A [2025 DAAD survey](#) found that 64% of currently enrolled international students plan to remain in Germany after completing their studies, with the highest stay intention amongst economics, engineering and computer science students.

¹⁸⁸ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

¹⁸⁹ EUROSTAT (2021), Residence permits (migr_res), https://ec.europa.eu/eurostat/cache/metadata/en/migr_res_esms.htm

¹⁹⁰ European Migration Network (2018), Attracting and retaining international students in the EU. https://home-affairs.ec.europa.eu/whats-new/publications/attracting-and-retaining-international-students-eu_en

¹⁹¹ The international graduate retention rates presented in this study are drawn from a meta-analysis of national-level studies that differ in methodology- including the timespan and number of years after graduation considered, the student strata covered, and other parameters - rather than from a single, uniform measurement by the study team. They should therefore be read as indicative of broad patterns rather than as directly comparable figures across countries.

Table 6: Country clusters by incoming mobile student retention rates.

Cluster of countries	Evidence from national level studies
Moderate and high rates of international ¹⁹² student retention	• The Netherlands, where in 2025 around 25% of international students are reported to have remained in the country 5 years after graduation. The Nuffic study disaggregates by origin: non-EEA graduates have a significantly higher stay rate (39%) than EEA graduates (20%), with EU students from countries such as Germany and Italy particularly likely to leave after graduation.¹⁹³ • Finland, where according to 2023 data around 50% of foreign students are still in the country one year after graduation (covering both EU and non-EU students combined).¹⁹⁴ • The 2018 Danish study found that 42% of international graduates remained in Denmark two years after graduation, with only one in three employed within that timeframe EU and non-EU students combined ¹⁹⁵. • In Czechia, a 2022 survey of international alumni from Czech universities found that 45% of respondents who had completed full degree programmes remained in the country for employment, while 13% stayed on for further studies (EU and non-EU students combined).¹⁹⁶ • The Destatis data tracks non-EU students only, as EU students do not require residence permits. Between 2006 and 2011, about 184,200 international students received a first-time study residence permit in Germany, of whom 48% remained after five years and 38% after ten years¹⁹⁷.
Low rates of international student retention	• The Polish Graduate Tracking System (ELA) reports that only about 1–2 % of international graduates in fields like medicine or agriculture were employed in Poland a year after graduation (EU and non-EU students combined) ¹⁹⁸. • Economic study (2025) confirmed that only 5% of international students stay and work in Latvia after graduation (EU and non-EU students combined)¹⁹⁹. • Recent estimates (2024), merely about 5–7% of international students stay in Lithuania after finishing their studies (EU and non-EU students combined)²⁰⁰.

Source: study team based on desk research.

¹⁹² The identified studies did not differentiate EU from non-EU international students.

¹⁹³ <https://www.nuffic.nl/en/research-facts-and-figures/research/stay-rate-and-labour-market-position-of-international-graduates>

¹⁹⁴ <https://www.oph.fi/en/news/2025/increasing-share-foreign-students-find-employment-finland>

¹⁹⁵ Ministry of Education and Research (Denmark), 2018. <https://www.ft.dk/samling/20171/almdel/UFU/bilag/158/1930107.pdf>

¹⁹⁶ Study in Czechia. "Survey among international alumni of Czech universities". 2022.

https://www.studyin.cz/soubory/clanky/0021_publications/Survey-among-international-alumni-of-Czech-universities-2022-0.pdf

¹⁹⁷ https://www.destatis.de/EN/Press/2022/10/PE22_435_12.html

¹⁹⁸ https://ela.nauka.gov.pl/en/labor-market/foreign_graduates_in_the_polish_labour_market

¹⁹⁹ Rīga Stradiņš University (2025). LASER pētījums par Latvijas augstākās izglītības sistēmu. Available at: https://www.rsu.lv/sites/default/files/imce/Zinas/laser_petijums_2025.pdf

²⁰⁰ <https://www.lrt.lt/en/news-in-english/19/2354393/more-foreigners-choose-to-study-in-lithuania-but-few-stay-to-work>

The available evidence points to the following key factors motivating foreign students to stay in their host country:

- **Direct access to the national labour market after graduation** (for third-country nationals). In many countries, foreign graduates can remain in the country for a certain amount of time upon graduation while they search for a job, which would then allow them to convert their student visa (or job seeker visa) into a work visa. Many EU countries adopted these incentives and allowed graduates to stay in the country (usually for 12 months after graduation) (for more details, see section 2.1.9 below). This gives them a competitive advantage over other foreigners who apply for jobs directly from abroad, as not all companies are willing to make the extra effort to sponsor worker visas, with the corresponding administrative costs and delays in hiring compared to a graduate who is already immediately eligible. For many citizens of certain third countries, degree mobility might be the only realistic chance to migrate to an EU country. However, data from the OECD (2019)²⁰¹ show remarkable differences between countries: the share of work permits converted from education permits ranges from around 50% in some countries to below 10% in others, despite policy narratives favouring education paths to legal migration (see Annex 2 for country-level data).
- **Better professional perspectives, in terms of better salary expectations and/or relevant career opportunities** (context-specific). A five-country survey (“Mobile Talent?”) that focused on non-EU international students at master and PhD level in Germany, Austria, France, UK, Sweden, and the Netherlands, found the two main motives for remaining in the country of study are good labour-market prospects and gaining international work experience, with more than 80% of respondents in all countries citing these as important factors²⁰². A recent (2025) large-scale survey in Germany (21,000+ students, DAAD), covering **both EU and non-EU students**, showed **64% of international students plan to stay and work**, citing attractive career prospects as the main motivating factor - with intent to stay particularly high among students of economics, engineering and computer science²⁰³.
- **Quality of life and other opportunities** in the host countries is another key reason as evidenced by available data. The above-mentioned study on international non-EU students in five European countries that “quality of life”,

²⁰¹ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

²⁰² Sykes, K., & Chaoimh, E. Ó. (2012). *Mobile Talent: Transnational Migrants as Agents of Brain Circulation?* Stiftung Mercator / Sachverständigenrat deutscher Stiftungen für Integration und Migration. Available at: https://www.stiftung-mercator.de/content/uploads/2020/12/SVR_Sykes__Chaoimh_Study_Mobile_Talent_April_2012.pdf

²⁰³ Ankommen – Studieren – Bleiben: DAAD-Studie über Mobilität und Verbleib internationaler Studierender. DAAD. Available at: https://static.daad.de/media/daad_de/infos-services-fuer-hochschulen/expertise-zu-themen-laendern-regionen/daad_studie_ankommen_studieren_bleiben.pdf

“lifestyle/way of life”, and “opportunities for further education” were key reasons to stay highlighted by 65-80% of respondents depending on the country²⁰⁴.

- **Career opportunities linked to the university career services and/or research projects.** HEI career services – counselling, job pools, internships and apprenticeship connections – create a strong incentive to stay in the host country, as returning home immediately forfeits access to these networks. Available evidence confirms that **all international students**, though its accompanying survey data on staying intentions focuses on **non-EU** students specifically²⁰⁵. demand for career and employability services among international students is high while capacity gaps are widely reported, underscoring these services’ centrality to post-study outcomes²⁰⁶.
- **Internships are also relevant to the labour-market dimension** of degree mobility in the opposite direction: some degree-mobile students undertake internships or placements in their home country during their studies abroad, maintaining professional ties, networks and labour-market visibility at home. This channel can support later return or circular mobility, complementing the return-incentive schemes discussed below, but it is not systematically captured by existing degree mobility data sources, which do not track internship location or frequency for degree-mobile students.
- **Limited labour market recognition in the country** of origin for the qualifications obtained abroad, particularly in regulated professions, might motivate students to stay in their host countries. The European Training Foundation notes that returning migrants often struggle to have their EU-acquired qualifications recognised back in their countries of origin-a common barrier in regulated professions,²⁰⁷ particularly but not exclusively in the case of non-EU students.

Incentives to return to the country of origin

Cross-country analysis indicates that several EU Member States-particularly in Southern and Central and Eastern Europe-have introduced policies to incentivise the return of skilled workers. These schemes generally do not target citizens who obtained a higher education degree abroad specifically, but rather focus more broadly on highly qualified professionals who have spent several years working outside their home country, regardless of the host country they have been living in.

Across the countries reviewed, return incentive schemes typically combine one or more of the following instruments: income tax exemptions or reductions for a fixed

²⁰⁴ Sykes, K., & Chaoimh, E. Ó. (2012). Mobile Talent: Transnational Migrants as Agents of Brain Circulation? Stiftung Mercator / Sachverständigenrat deutscher Stiftungen für Integration und Migration. Available at: https://www.stiftung-mercator.de/content/uploads/2020/12/SVR_Sykes__Chaoimh_Study_Mobile_Talent_April_2012.pdf

²⁰⁵ Schmid, K., & Kraler, A. (2015). Train and Retain: Policies and Promising Practices to Facilitate Graduate Retention in Europe. SVR Research Unit / German Advisory Council on Integration and Migration (SVR). Available at: https://www.svr-migration.de/wp-content/uploads/2015/08/Study_Train-and-Retain_SVR-research-unit_WEB.pdf

²⁰⁶ Supporting International Graduate Employability, Universities UK International (UUKi). Available at: <https://www.universitiesuk.ac.uk/sites/default/files/uploads/UUKi%20reports/Supporting-international-graduate-employability.pdf>

²⁰⁷ Recognition of Qualifications, European Training Foundation (ETF). Available at: <https://www.etf.europa.eu/sites/default/files/2024-08/Recognition%20of%20qualifications.pdf>

period after return; relocation and moving cost subsidies; research grants and salary support for returning academics; and assistance with diploma recognition and language training. Countries with schemes include Cyprus, Italy, Poland, Bulgaria, Portugal, Croatia, Romania, and Lithuania. Detailed scheme descriptions are provided in the Annex 2.^{208 209 210 211 212 213 214}

In some cases, scholarships supporting outgoing degree mobility have a requirement to return and work in the home country after graduation. In **Slovenia**, the *Ad Futura* scholarship scheme provides financial support to Slovenians who want to study abroad, both at undergraduate and postgraduate level.²¹⁵ Recipients of the *Ad Futura* scholarship are required to return to and work in Slovenia after completing their studies abroad for “a period equal to the period of scholarship received”.²¹⁶ Similar schemes were identified in **Estonia**²¹⁷ and **Lithuania**.²¹⁸

2.1.9. Strategic degree mobility in relation to labour market needs and legal migration pathways

Study question	Strategic mobility: What is the link between policies related to degree mobility and labour market needs (including legal migration pathways)? How do openness and dynamism, professional integration opportunities in the host and home country affect mobility? Are there policies and analysis of strategic needs linking the two at national level?
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International degree mobility is increasingly framed as a labour-market instrument, with post-graduation work permits and legal pathways used to retain graduates in high-demand sectors.

Based on the evidence from the country reports, and within the limits of their scope and level of detail, the following analysis highlights a set of recurring thematic clusters that characterise how international education policies are aligned with labour market needs, particularly within legal migration frameworks related to international student mobility. More detailed country examples are provided in Annex 2 section 1.1.9.

²⁰⁸ <https://cyprus-mail.com/2025/08/28/cyprus-steps-up-effort-to-attract-cypriot-returnees>

²⁰⁹ <https://moving2italy.com/it/fiscale/rientro-cervelli-2025>

²¹⁰ <https://www.pit.pl/ulga-na-powrot-pit-zero/>

²¹¹ <https://nawa.gov.pl/en/scientists/polish-returns>

²¹² <https://bnr.bg/en/post/102191039/the-application-process-for-the-i-choose-bulgaria-initiative-begins-in-september>

²¹³ <https://www.programaregressar.gov.pt/en/>

²¹⁴ <https://www.idealista.pt/news/financas/economia/2025/09/01/71353-programa-regressar-bate-recorde-em-2025-e-atrai-mais-emigrantes>

²¹⁵ See <https://srips-rs.si/en/scholarships/ad-futura-scholarships>

²¹⁶ See <https://www.srips-rs.si/en/scholarships/ad-futura-scholarships/for-education-abroad/for-studies-abroad>

²¹⁷ <https://harmo.ee/en/scholarships-and-grants/scholarships-studying-and-working-abroad/kristjan-jaak-scholarships>

²¹⁸ <https://mjfondas.lt/>

Post graduation work permits and legal migration pathways

While EU students do not require visas, many EU Member States offer post-study work permits from non-EU country graduates that typically last 9–12 months to support transition into employment, alongside simplified residence procedures to encourage graduate retention. Spain and Sweden go further by integrating legal migration pathways into student mobility policies, expanding work rights during studies and improving access to residence, strengthening attractiveness and retention of international talent in those Member States.

National-level policies

Many European countries have national policies linking degree mobility to labour market needs, though approaches vary. Across these Member States, strategies range from fully operational retention systems to more cautious or experimental approaches, reflecting differences in labour market priorities, institutional capacities, and demographic pressures. National-level policies combine targeted recruitment or talent-attraction initiatives, support for integration (e.g., language training, internships, employer linkages), and systematic tracking of graduate outcomes to inform policy. Most also focus on retaining graduates in key sectors or regions with labour shortages, making study-to-work transitions smoother and ensuring international talent contributes to the domestic workforce.

- **Proactive retention and talent-attraction:** Finland (Talent Boost), Czechia (priority-country recruitment, Study in Czechia), Germany (National Skilled Labour Strategy, DAAD initiatives), Italy (ANS registry, Invest Your Talent), Estonia (Education Strategy 2021–2035), Hungary (Stipendium Hungaricum tracking), Romania (National Strategy for Immigration) all combine post-study pathways with measures to retain graduates and align education with labour demand
- **Integration and labour-market facilitation:** Croatia tracks graduate outcomes and aligns education with labour needs, supporting reintegration. Policies focus on data collection, language support, and employer linkages to enhance graduate retention.
- **Managed or restrictive approach:** Denmark, in contrast to the measures listed above, limits English-taught programmes due to labour market and cost concerns. Similarly, the Netherlands has proposed the Internationalisation in Balance Act to cap non-EU student admissions and strengthen Dutch-language requirements, though the proposal has since been abandoned.

Strategic alignment

In Ireland, Malta, Slovenia, and France, the link between degree mobility and labour market needs remains largely strategic rather than operational. Ireland has proposed a graduate visa and residency pathways, Malta seeks skilled inflows without concrete targets, Slovenia is improving data collection on graduate transitions, and France is beginning to track international graduate outcomes.

Key Factors Shaping Graduate Retention

Across all countries, language, labour-market conditions, and social factors strongly influence who stays after graduation. English-taught programmes and strong job prospects attract students, while language barriers and weak opportunities push them out, cited as key obstacles in countries like Poland, Germany, Latvia, Hungary, Estonia, Romania, Austria, and Lithuania. Labour-market dynamism on the other hand matters significantly, as seen in Germany, where more graduates are retained due to higher employment potential, whereas Romania and Hungary struggle. Cultural inclusivity also affects retention, with welcoming environments as reported in Norway and Iceland boosting stays, while discrimination in places like Czechia deters students.

2.1.10. Degree mobility in regulated professions: specific trends, barriers and system implications

Study question	Are there distinct trends and challenges for study programmes where qualifications are giving access to practice in regulated professions (i.e. professions that are regulated by national law or administrative rules)? Are there specific issues in terms of balanced mobility, including concerning admission, related to these specific study fields? What impact does this have on provision by higher education institutions, on competent authorities responsible for recognition decisions, and on recruitment into regulated professions, whether in home or destination countries?
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In regulated professions, mobility flows are structurally skewed: some systems mainly export students because of tight capacity and selective admissions, while others specialise in attracting fee-paying international cohorts through dedicated medical and related tracks.

Drawing on the evidence provided in the country reports and constrained by the scope and level of detail available therein, the following analysis identifies several recurring thematic clusters that characterize trends and challenges in student mobility within study programmes leading to regulated professions. More detailed illustrations for selected countries are presented in Annex 2 section 1.1.10.

- (1) The first cluster of countries reports **pronounced inbound degree mobility in regulated fields**, especially medicine, dentistry, often linked to English- or other foreign-language provision, comparatively lower tuition fees than in many Western European systems and major non-European destinations, and clear EU-wide recognition of qualifications. This pattern is particularly visible in Central and Eastern Europe (e.g. Romania, Czechia, Croatia, Hungary, Poland, Lithuania, Latvia) as well as Austria, Belgium and Malta, where medical and

dental programmes in English, French or German are deliberately positioned as international tracks and important sources of fee income for higher education institutions, and where foreign enrolments are generally not capped in these tracks. These systems typically combine strong international demand with nationally regulated access to practice, which can create tension between using international recruitment to fill capacity and ensuring sufficient domestic supply of professionals.

- (2) A second cluster, notably Ireland, Norway and France, emphasises **outward degree mobility in regulated professions because of limited domestic study places and highly selective admission regimes** in areas such as medicine, dentistry, veterinary medicine and psychology. Also, in countries such as France, Spain, Germany²¹⁹, and the Netherlands, historically low admission caps, competitive selection procedures and language requirements in medicine have similarly turned these systems into exporters of medical students, with sizeable numbers enrolling in programmes in Central and Eastern European countries that offer dedicated international or even German-language medical tracks (see above). This outward mobility can alleviate immediate pressure on domestic systems but raises questions about recognition on return and about the eventual distribution of qualified professionals between home and host countries.
- (3) Several countries display **distinctive structural or regulatory features** that shape mobility patterns in regulated fields: Luxembourg is an outlier because the absence of full domestic medical programmes structurally requires students to study medicine abroad, while nursing has recently been moved into the university to support mobility. Denmark stands out for Nordic cooperation arrangements that guarantee equal access and mutual recognition,²²⁰ which, in medicine and veterinary studies, leads to inflows of Nordic students occupying a substantial share of study places.

The clusters identified above also have clear **implications for (balanced) mobility and admissions** in regulated professions. Highly selective and capacity-constrained systems (Cluster 2) tend to export students, while ‘export’ systems with international medical tracks (Cluster 1) mainly receive them, creating structurally asymmetric flows.

Drawing on the evidence provided in the national country reports, mobility patterns in regulated professions have tangible implications for institutional provision, recognition practice and workforce supply in both sending and receiving systems. The following

²¹⁹ Evidence shows that in 2021 around 8% of German medical students were studying abroad, with at least 7,500 enrolled internationally. The largest numbers were in Austria (2,585) and Hungary (2,051), followed by Poland (859), the Czech Republic (422), the United Kingdom (421), and Lithuania (413). <https://thepienews.com/at-least-8-of-german-medical-students-enrolled-overseas/>

²²⁰ While EU law guarantees equal treatment for EU citizens and sets common rules for the recognition of professional qualifications, the Nordic agreements add more far-reaching, regional commitments on admission and automatic recognition of qualifications within this sub-region. Source: Nordic Council of Ministers. (2022). Nordic declaration on the recognition of qualifications concerning higher education: The Reykjavik Declaration (Revised 2022). Nordic Council of Ministers.

analysis therefore reflects how these dynamics are described in the respective country studies.

- **Impact on higher education provision:** In countries that attract substantial inbound mobility in medicine and related fields, higher education institutions have progressively developed international tracks (often in English or another widely used language) which function as dedicated recruitment channels and significant revenue sources alongside more tightly regulated domestic programmes. Conversely, in systems characterised by rigid, placement intensive curricula, institutions face persistent difficulties in opening structured mobility windows, and in some cases respond by offering targeted topup or bridging courses to accommodate incoming students or returning graduates within national regulatory frameworks.
- **Impact on competent recognition authorities:** The combination of outward flows from capacityconstrained systems and inward flows into “export systems” increases both the volume and complexity of recognition and licensing decisions for EU and non-EU **qualifications** in regulated professions. Respective authorities must navigate heterogeneous programme structures, language regimes and scopes of practice, which may result in detailed casebycase assessments and contribute to lengthy procedures and administrative backlogs in some countries.
- **Impact on recruitment into regulated professions:** For host countries with large international cohorts in medicine and other regulated fields, low postgraduation retention means that expanded provision does not automatically translate into a stable domestic supply of professionals, particularly in healthcare. For sending countries that rely on study opportunities abroad because of limited domestic capacity, recruitment into regulated professions can be undermined when returning graduates encounter additional licensing hurdles or choose to remain in destination countries, reinforcing structural shortages at home.

2.2. Credit mobility

2.2.1. Conceptualising balanced credit mobility and its systemic challenges

2.2.1.1. Balanced credit mobility in the context of the EU policy

In the context of the Bologna/EHEA process, the concept of “balanced mobility” as reciprocity between the participant countries was more explicitly linked to degree mobility, since “it can have a sustained effect on the host and home countries, can facilitate capacity building and cooperation and may lead to brain gain on the one side and to brain drain on the other”.²²¹ In contrast, the definition of “balance” in the context of credit mobility has been less prescriptive and mostly linked to the outgoing mobility targets rather than formulas of balance.

2.2.1.2. Balanced credit mobility in national policies

Although no country provides an official definition of balanced credit mobility, the term is generally understood as achieving an equal number of incoming and outgoing mobile students. While some countries have set national targets for outgoing mobility in line with the Council Recommendation, others have defined their own separate objectives, and a further group reports having no explicit commitments in this area

González and colleagues²²² argue that in order to understand trends, balances and imbalances in credit mobility across countries and world regions, it is essential to first examine how credit mobility is defined at national and regional levels, as the trends and conceptualisation of “balance” are shaped by these approaches.

Evidence from country-level research shows significant variation in national policies and conceptualisations of balanced credit mobility. Although **no country provides an official definition of balanced credit mobility**, the term is **generally understood as achieving an equal number of incoming and outgoing mobile students**, including in **Denmark, Croatia, Estonia, Slovakia, Lithuania, Norway, Ireland, Slovenia, Sweden, Germany, the Netherlands and Belgium-Flanders**.

The country-level analysis of this study shows that some countries have established **national targets for outgoing mobility consistent with the Council**

²²¹ Conference of European Ministers Responsible for Higher Education (2012), Bucharest Communiqué: Making the Most of Our Potential – Consolidating the European Higher Education Area, Bucharest, 26-27 April. Available at: https://ehea.info/Upload/document/ministerial_declarations/Bucharest_Communique_2012_610673.pdf

²²² González, J. M. et al. (2022). Credit mobility. In: D. K., Deardorff, H. de Wit, B. Leask, H. Charles (Eds.), *The Handbook of International Higher Education*. Stylus Publishing. <https://www.routledge.com/The-Handbook-of-International-Higher-Education/Deardorff-deWit-Leask-Charles/p/book/9781642671131?srsltid=AfmBOooQDxaPF-h-Wwzivb3lhHnCrylcaVza6M6qQfgJAHfXwyT0SFGo>

Recommendation, others have articulated their **own distinct national objectives**, whereas a further group reports **no explicit measurable commitments** in this area:

- Several countries **align explicitly with European objectives**, notably the EU-level target that 23% of graduates should have a study or training period abroad by 2030, including through credit and/or degree mobility (based on a 2024 Council Recommendation,)²²³. **Finland, Germany and Romania** follow this harmonised goal, with Romania also aiming for 20% of mobile learners from fewer-opportunity groups by 2027.
- A second group has established **precise national mobility targets**. **Czechia** aims for 20% of bachelor's and master's graduates to study or train abroad for at least 14 days and for 80% of doctoral students to spend at least 30 days abroad. **Flanders region of Belgium** exceeded the EU target by aiming for 33% credit mobile graduates by 2020. Estonia's strategy sets credit mobility target of 15% by 2035 for bachelor's and master's students. **Norway** focuses exclusively on outbound mobility with a target of 50% participation, encompassing both credit and degree mobility. **Austria and Greece** highlight inclusive mobility targets aiming to increase participation among people with fewer opportunities.
- A third group, including **Iceland, Poland, Spain, Luxembourg, Sweden, Bulgaria, Latvia, Cyprus, Lithuania, Malta, France, the French-speaking Community of Belgium, Slovenia and the Netherlands**, does not define measurable national targets for credit mobility.

Country-level research evidence also indicates that two EU countries have introduced **targeted policies to promote reciprocity between incoming and outgoing exchange students**, linking the achievement of such a balance to the funding of higher education institutions.

In **Denmark**, In the case of credit mobility, there is a broadly accepted political objective to promote proportionality ensuring that incoming and outgoing flows are reasonably aligned. This balance is *de facto* encouraged and supported through the Danish higher education funding model. The backbone of this model is the so-called *Taximeter grant*, which provides financial support to institutions based on completed study credits.²²⁴ Incoming mobile students, like Danish students, generate Taximeter grants for higher education institutions (HEIs) by completing study credits. However, the system includes an economic safeguard to ensure balance: the number of study credits – and thus the financial grant to HEIs – generated by incoming students cannot exceed the equivalent number of study credits earned by the institution's own students while on mobility abroad. This mechanism is designed to maintain both economic and academic equity between incoming and outgoing student mobility. Originally designed for universities, to prevent institutions from financially benefiting from incoming mobility²²⁵ it was expanded to non-university HEIs in 2024.

²²³ https://www.oph.fi/sites/default/files/documents/28083_living_and_learning.pdf

²²⁴ [Case study report Denmark](#), in Ben Jongbloed et al (2023) Study on the state and effectiveness of national funding systems of higher education for the European Universities, vol 2 for DG EAC

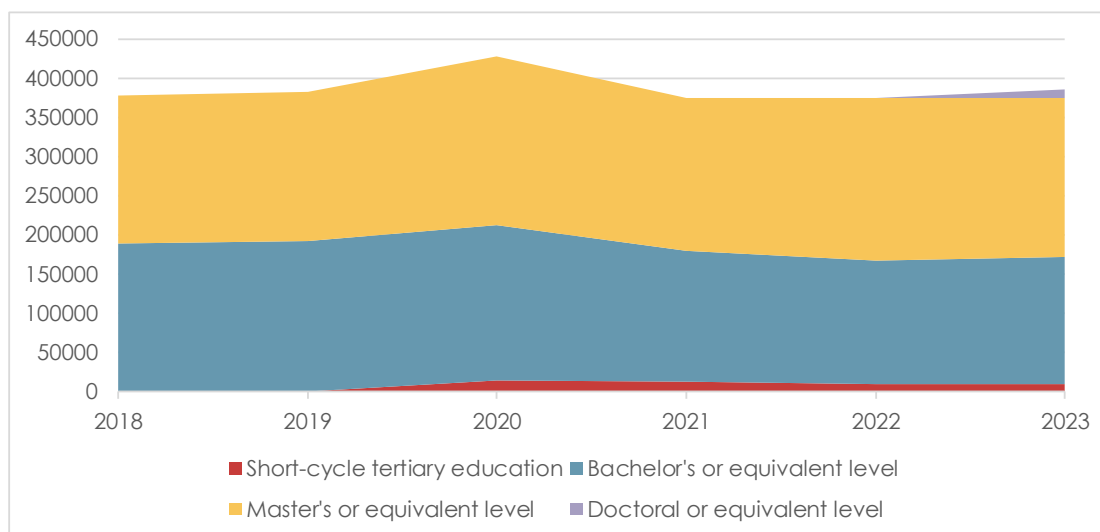
²²⁵ Curbing practices where large cohorts of exchange students were admitted primarily to generate ECTS and taximeter funding

A similar practice exists in **Lithuania** where specific regulatory frameworks are in place to promote a balance between incoming and outgoing students in credit mobility. These include, for example, the external evaluation framework for higher education and performance-based funding mechanisms²²⁶, under which higher education institutions receive additional resources for internationalisation indicators measured by the number of incoming and outgoing students. Institutions are granted extra funding when they maintain a balance between students leaving and arriving under exchange programmes²²⁷.

2.2.2. Recent trends and patterns in credit mobility

The EUROSTUDENT survey²²⁸ (8th edition, data collected in 2022, published in 2024) estimated that, on average, 5% of all tertiary education students had taken part in a temporary study period abroad during their studies (referring here to credit mobility)²²⁹, with an additional 1% having participated in work placements abroad, and another 3% having participated in both a study period and a work placement abroad, making a total of 9% of students. The survey identifies another 14% of students who had been abroad but for other study-related activities (e.g. research/field trip, summer/winter school, language course) not included in the previous categories.

Figure 8: Credit mobile graduates (at least 3 months abroad) by education level, study and/or work placement, EU27 (2018-2023)



Source: Prepared by study team, Eurostat data ([educ_uoe_mobc01](#), 2025).

²²⁶ www.e-tar.lt/portal/lt/legalActPrint?actualEditionId=tGKQDiEUcs&documentId=f7967320a89011e9b474d97de297fe08

²²⁷ In 2024, the Methodology for the Allocation of Erasmus+ Funds for Higher Education Student and Staff Mobility in Lithuania was revised to strengthen the principle of balanced mobility between incoming and outgoing students. Under the updated approach, higher education institutions (HEIs) are encouraged to receive approximately as many incoming exchange students as they send abroad. Institutions are not penalised if they host more incoming than outgoing students; however, they do not receive additional incentives for imbalanced mobility flows. Instead, 17–20% of the total Erasmus+ mobility funds are distributed to HEIs in proportion to their level of balance between outgoing and incoming student study mobilities.

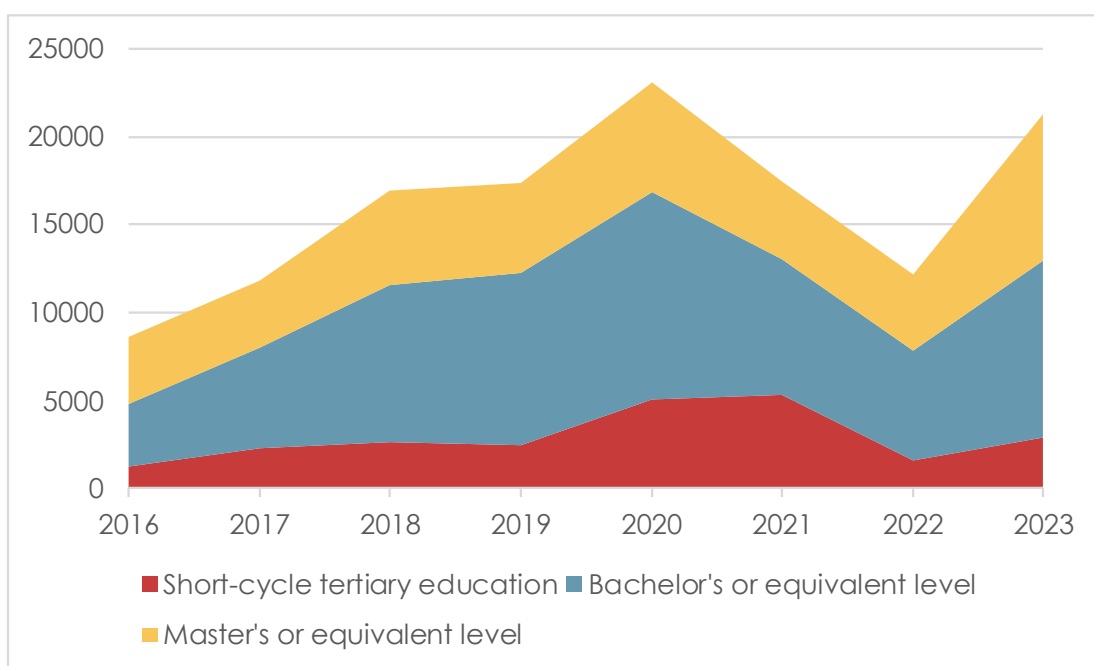
²²⁸ The scope of EUROSTUDENT is the European Higher Education Area, therefore including several non-EU countries. However, for this indicator, all countries considered were from the EU/EEA, plus two third countries (Azerbaijan, Switzerland).

²²⁹ Note that these figures are not those used to calculate the EU-level target for EU tertiary education graduates who had mobility period abroad. Whereas the latter concerns graduates, Eurostudent mobility data concerns students.

Notes: Credit mobility may refer to study periods and/or work placements abroad. EU-wide data for short cycle is only available since 2020 and, for PhD, only since 2023.

Eurostat data on credit mobile graduates having spent less than 3 months abroad show a similar inflection point in 2020, though with more abrupt changes. After a considerable increase, particularly at bachelor's level between 2016 and 2020, a sharp drop can be observed (see figure below) until 2022. This is probably a delayed effect of the reduction in credit mobility opportunities and attractiveness during the COVID-19 pandemic²³⁰. While numbers quickly bounced back in 2023, they still did not recover 2020 levels.

Figure 9: Credit mobile graduates (less than 3 months abroad, study period and/or work placement) by education level, EU27* (2018-2023)



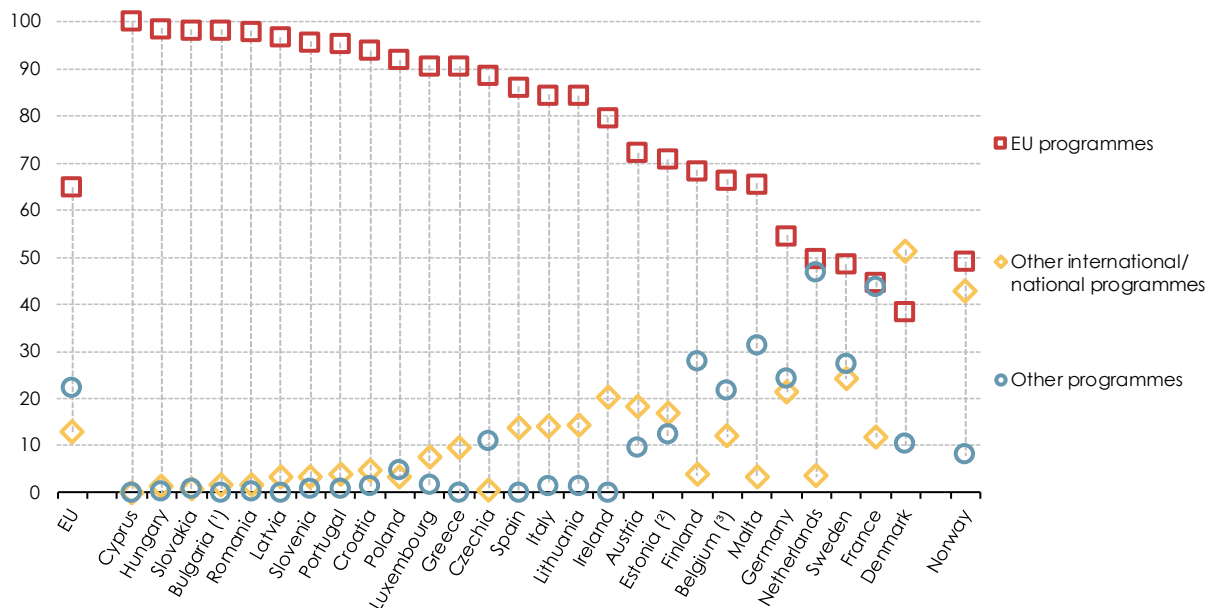
Source: Prepared by study team, Eurostat data ([educ_uoe_mobc03](#), 2025).

*Note: Data was fully missing for 12 countries (Bulgaria, Denmark, Ireland, Greece, France, Croatia, Italy, Luxembourg, Hungary, Netherlands, Poland, Portugal) out of the 28 selected countries, as well as for specific years and/or levels.

As shown in the following figure, most of credit-mobile graduates in the EU had accessed their mobility experience through EU programmes, notably Erasmus+. However, notable differences among countries exist in this distribution, as shown in the next figure. Denmark was the only country whose graduates had other non-EU international or national programmes as the main instrument for accessing credit mobility. 50% or more of all credit mobile graduates in the Netherlands, Sweden, France and Norway accessed their mobilities through non-EU programmes.

²³⁰ As this data is collected in the year the student graduates, not on the year the student undertakes the credit mobility experience, disruptions in these only show their full effects after one or two years.

Figure 10: Distribution of type of mobility scheme among credit-mobile graduates (at least 3 months abroad for a study period and/or work placement) at bachelor's or equivalent level (2023)



Source: Prepared by study team, Eurostat data ([educ_uoe_mobc01](#), 2025).

Notes: ranked on EU programmes. (1) Estimates. (2) Undercoverage. (3) Data refer only to the Flemish Community. (4) 2022. (5) 2021.

Additional findings are presented in the Annex 2 section 1.2.1.

2.2.3. Push–pull conditions shaping credit mobility choices

Study question

What are the push and pull factors impacting students' choices?

Credit mobility choices are shaped by a strong pull from high student interest and perceived social and personal benefits but are simultaneously constrained by powerful push factors—notably financial costs, work and family commitments, curricular rigidity, and administrative barriers—that vary markedly across countries and prevent many willing students from participating.

In contrast to degree mobility, there is considerably more cross-country *comparable* evidence available on credit mobility—primarily through the EUROSTUDENT survey, which includes questions on students' intentions to participate and the barriers they perceive.

Eurostudent survey data (8th edition, published in 2024)²³¹ provided insights on different shares of students going abroad for credit mobility in each country, as

²³¹ Available: <https://metadata.fdz.dzhw.eu/en/data-packages/stu-es8?page=1&size=10&type=surveys&access-way=download-suf&version=3.0.0>

described in section 2.2.2. A common trend across countries is that the **share of students who did go for a study period abroad (6%) is much smaller than of those who intend or are preparing to study abroad (30% of the remaining 94%)**. This discrepancy highlights the presence of obstacles preventing (or at least disincentivising) initially interested students from finally participating in study periods abroad. It also suggests that, if those obstacles were removed, the share of participating students could increase from 6% to potentially reach the Council Recommendation's target. While there might be other reasons beyond these obstacles preventing students from acting on these initial intentions to study abroad, the size of the gap suggests considerable room for improvement.

Furthermore, the survey evidence provides concrete data on the most pertinent obstacles for study exchanges as perceived by respondent students. The additional **financial burden** that these experiences entail, from travelling costs to higher costs of living in the country of destination, is by far the main obstacle identified by each of the four categories of respondents (those who do not intend to have a study period abroad, those who have not yet participated in one but intend to do so at some point, those who are currently preparing for one, and those who have already participated in one).²³² More granular cross-country analysis of Eurostudent survey data shows that **financial burden emerges as the most consistently reported “big” obstacle to credit mobility, forming a clear pan-European constraint, albeit with marked variation in intensity**. Shares are highest in Southern and Eastern European countries (e.g. Portugal 74%, Poland 73%) and lowest in Nordic countries (e.g. Denmark 47%, Sweden 46%), suggesting comparatively stronger student support systems, though cost barriers remain substantial everywhere. Full country-by-country data are provided in the Annex 2 section 1.2.3.

A second, cross-cutting cluster of obstacles relates to social and employment-related constraints, particularly **separation from partner/children** and **loss of paid job**, which are especially salient in countries with high student employment rates or older student populations. Both barriers peak in Iceland and Norway and are most prevalent across Nordic and some Central European countries, pointing to a “work–study compatibility” cluster where mobility is constrained less by institutional barriers and more by students' embeddedness in labour markets and family life. Country-level data are provided in the Annex 2.

In contrast, a distinct group of countries is characterised **by information, language, and programme-structure barriers**. Language skills are reported as a major obstacle by 30–42% of students in several Central and Eastern European countries (e.g. Ireland, Poland, Slovakia), but by fewer than 12% in Nordic countries. Difficult programme integration is similarly concentrated in CEE countries (Czechia, Austria, Poland, Slovakia), and is closely coupled with recognition concerns. This pattern suggests a “programme interoperability and recognition” cluster, where institutional design and academic rules are perceived as more restrictive than financial or social factors

Countries differ markedly in how students perceive the added value of study abroad, revealing a distinct “motivation/returns” dimension. Low perceived benefit is most common in Central and Western European countries (e.g. Slovakia 37%, Poland

²³² The reply options were not mutually exclusive.

34%, the Netherlands 31%, Ireland 31%) and least common in Nordic countries (e.g. Denmark 15%, Sweden 19%), suggesting that in some systems students question the academic or labour-market returns of credit mobility, whereas in Nordic countries mobility is more clearly embedded in curricula and perceived as beneficial. Full country data are in the Annex 2.

Another clear axis of divergence concerns **access regulations** (formal eligibility rules and administrative prerequisites that govern whether a student is *permitted* to participate in mobility) and **access to (credit) mobility programmes**, which vary much more across countries than often assumed. Both types of access barrier are most pronounced in Poland, Portugal and Romania, and almost negligible in Nordic and Dutch systems, pointing to a distinct “administrative access” cluster where students face barriers at the entry point to mobility schemes rather than during recognition or reintegration. Country-level data are provided in the Annex 2.

Overall, the data point to four broad clusters of countries in terms of key obstacles to exchanges/credit mobility experiences by students:

- a **financially constrained cluster** (notably Southern and several Central/Eastern European countries), where financial burden is the dominant perceived obstacle
- a **socially and employment-constrained cluster** (mainly Nordic and some Western European countries), where loss of paid job and family/social commitments weigh most heavily on mobility decisions
- a **structural/institutional barrier cluster** (primarily Central and Eastern European countries), characterised by difficult integration into study programmes and recognition concerns (often alongside language/information constraints);
- an **access- and programme-availability constrained cluster** (notably in parts of Central/Eastern and Southern Europe), where access regulations and limited access to mobility programmes are reported as major obstacles
- a **motivation and perceived-benefit constrained cluster** (cutting across several Western and Central European countries), where students question the academic or labour-market value of mobility despite relatively favourable access conditions.

Although with some variation, the Erasmus+ Impact Study largely confirmed these barriers, identifying family reasons and personal relationships as the most frequently reported obstacles to student mobility (47% of respondents), followed by financial reasons (31%)²³³. The gap between intending and completing mobility also reflects a combination of self-selection (students who find barriers insurmountable drop out before participating), financial survivorship, and cohort composition effects; these methodological considerations are discussed in the Annex 2. **In terms of pull factors, at all study levels, the opportunity to expand social networks and meet people from different countries was the dominant motivation for Erasmus+ mobility,**

²³³ European Commission: Directorate-General for Education, Youth, Sport and Culture, CHE Consult and ICF Consulting, Erasmus+ higher education impact study – Final report, Publications Office of the European Union, 2018, <https://data.europa.eu/doi/10.2766/162060>

while academic factors-such as host institution quality and access to courses unavailable at home-play a secondary role and become more salient at higher levels of study, particularly for doctoral students²³⁴.

The EUROGRADUATE 2022 study²³⁵ complements the above evidence and shows that student learning mobility is shaped by a combination of structural, socio-economic, and contextual factors: mobility levels vary strongly across countries, are generally lower in Southern and Eastern Europe, and declined markedly for the 2020/21 cohort due to the COVID-19 pandemic; participation is systematically lower among students from non-academic family backgrounds, indicating persistent social inequality; and national affluence, institutional opportunities, and individual resources jointly influence students' ability to engage in mobility, raising concerns that uneven recovery from the pandemic may further widen cross-country and social disparities in access to learning mobility.

Finally, cross-analysis of national-level data also found that many countries highlight **curricular rigidity and complex credit recognition as central barriers to credit mobility in regulated programmes** such as medicine, nursing, teaching and other licence to practice fields. Programmes are often highly structured, with tightly sequenced clinical or school-based placements and limited room for elective periods, which makes it difficult to integrate a study period abroad without prolonging studies. Countries in this cluster (BG, CZ, FI, IS, NO, SE) stress that recognition problems can lead to delays in graduation, extension of study time and, in some cases, lost semesters. This pattern underpins a general tendency for lower credit mobility rates in regulated programmes than in other, more flexible academic fields.

2.2.4. Linking credit mobility and degree mobility

Study question	What is the relationship between credit and degree mobility (including if students going on credit mobility more likely to be degree mobile, or moving to another country to work after graduation)?
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Although stakeholders commonly view credit mobility as a possible precursor to degree mobility, the relationship remains empirically underexplored, underscoring a clear evidence gap in national and cross-country research.

In general, available evidence shows that Erasmus (credit mobility) participants gain career benefits and are more likely to be involved in international mobility (long-term cross-border mobility involving residence in another country for work or other reasons)

²³⁴ European Commission: Directorate-General for Education, Youth, Sport and Culture, CHE Consult and ICF Consulting, Erasmus+ higher education impact study – Final report, Publications Office of the European Union, 2018, <https://data.europa.eu/doi/10.2766/162060>

²³⁵ European Commission: Directorate-General for Education, Youth, Sport and Culture, Mühleck, K., Jühlke, R., Köppen, L., Peter, F. et al., Careers, competences and values of European higher education graduates in 2022 – EUROGRADUATE 2022 – Comparative synthesis report, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2766/5393637>

after their graduation: e.g. a Europe-wide survey found 40% of Erasmus alumni moved to another country after graduation (versus 23% of non-mobile peers) and 93% of alumni could imagine living abroad (versus 73% of stay-home graduates)²³⁶.

While research indicates that both credit and degree mobility positively influence graduates' international career prospects, research analysing the impact of international student mobility on employment demonstrates that **degree-mobile graduates are more likely to work abroad compared to credit-mobile and non-mobile graduates**. Credit-mobile students also show higher international job index values than non-mobile graduates, suggesting that even short-term mobility experiences can enhance employability in international contexts^{237,238}. In Germany, a DAAD study of German Erasmus alumni found that those who did an internship abroad were **significantly more likely to work abroad later** than those who stayed at home²³⁹.

While there is robust evidence that credit mobility enhances students' international outlook and subsequent cross-border mobility, including in the labour market, **there is little direct evidence that it translates into increased participation in international degree mobility**. A few qualitative studies suggest short-term exchange can spark plans for a full degree abroad. In interviews with former Erasmus students, many described a lasting "international mindset". For example, one Nordic alumna acknowledges that if she had undertaken her Erasmus exchange earlier, she would have done her master's degree abroad²⁴⁰. Likewise, among "super-mobile" students who did multiple Erasmus exchanges, some reported choosing courses strategically to enable a future full-degree abroad²⁴¹. These accounts are anecdotal (from small interview samples) and do not prove causation, but they illustrate how credit mobility can influence students' aspirations for degree mobility. In general terms, the likelihood of degree mobility for credit mobile graduates depends on many more factors, including individual aspirations and institutional support²⁴².

Based on the cross-country analysis and national-level interviews, stakeholders consistently acknowledged a perceived link between credit mobility and degree mobility—namely that shorter study periods abroad may, in principle, encourage longer-term mobility for a full degree. However, stakeholders emphasised that this perception is largely based on anecdotal evidence drawn from their own experience. Overall, there

²³⁶ Erasmus Student Network (ESN) in cooperation with CHE Consult, Brussels Education Services and the Compostela Group of Universities (2013), Erasmus Impact Study: Effects of mobility on the skills and employability of students and the internationalisation of Higher Education Institutions in Europe. Available at: <https://www.esn.org/erasmus-impact-study>

²³⁷ Knutsen et al. (2024). Impact of international student mobility on international profile of jobs. *Higher Education*, <https://doi.org/10.1007/s10734-024-01267-1>.

²³⁸ Shkoler, O., & Rabenu, E. (2020). Defining international student mobility and higher education. In: O. Shkoler, E. Rabenu, P. M. W. Hackett, & P. M. Capobianco (Eds.), *International student mobility and access to higher education*. Palgrave. <https://doi.org/10.1007/978-3-030-44139-5>

²³⁹ Forschung & Lehre (2025), Wirkungsstudie: Erasmus+ ist beliebt und fördert Karrieren ["Impact Study: Erasmus+ is Popular and Fosters Careers"], 30 January 2025. Available at: <https://www.forschung-und-lehre.de/karriere/erasmus-ist-beliebt-und-foerdert-karrieren-6899>

²⁴⁰ Nada, C. I., & Legutko, J. (2022). "Maybe we did not learn that much academically, but we learn more from experience": Erasmus mobility and its potential for transformative learning, *International Journal of Intercultural Relations*, Vol. 87, pp. 183-192. Available at: <https://www.diva-portal.org/smash/get/diva2:1659794/FULLTEXT02.pdf>

²⁴¹ Cuzzocrea, V., Krzaklewska, E. Erasmus students' motivations in motion: understanding super-mobility in higher education. *High Educ* 85, 571–585 (2023). <https://doi.org/10.1007/s10734-022-00852-6>

²⁴² Barrioluengo, M. S., & Flisi, S. (2017). *Student mobility in tertiary education: institutional factors and regional attractiveness*. Publications Office of the European Union. DOI:10.2760/675338. JRC108895

is a general **lack of systematic, robust evidence and dedicated national-level studies** assessing the extent to which credit mobility fosters degree mobility, highlighting the need for further research in this area.

2.2.5. Innovative mobility formats and emerging policy instruments

Study question	Innovative mobility and emerging policy instruments: what is the expected impact of increase of digital and blended mobility, joint study programmes, the European Universities alliances and a potential joint European degree on balanced mobility and achieving the mobility target?
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Blended and virtual formats, the European Universities alliances (EUAs), and joint programmes collectively expand mobility opportunities and help reduce long-standing barriers to participation in learning mobility. Virtual and blended mobility broaden access by lowering financial, social, and time-related constraints, promoting inclusion for people with fewer opportunities. The European Universities Initiative strengthens internationalisation by embedding mobility into joint curricula, enabling smoother recognition, and advancing digital infrastructure. Joint study programmes and the emerging joint European Degree framework structurally embed mobility within higher education systems, inherently supporting more geographically balanced mobility flows.

Blended and virtual mobility formats

With the transformative advances of technology, new forms of learning mobility have become increasingly an alternative to traditional cross-border student mobility. The COVID-19 pandemic accelerated these developments by pushing higher education institutions to adopt internet-based tools and information and communication technologies (ICT) for teaching and learning. The closure of international borders during the pandemic forced many institutions to rely on virtual formats as substitutes for physical study abroad²⁴³. Thus, the concept of learning mobility has been broadened to encompass more flexible formats of international learning experiences that don't require actual physical travel across borders such as virtual mobility and blended mobility^{244, 245}.

Virtual mobility can take different formats and is often considered as 'internationalisation at home', bringing the international/global dimension into curricula

²⁴³ Flores et al. (2022). Studying abroad during COVID-19: Experiences of physical and virtual study visits and recognition of academic achievements. <https://erasmusplusresearch.eu/research/studying-abroad-during-covid-19-physical-and-virtual>

²⁴⁴ González et al. (2022). Credit mobility. In: D. K., Deardorff, H. de Wit, B. Leask, H. Charles. The Handbook of International Higher Education. <https://www.routledge.com/The-Handbook-of-International-Higher-Education/Deardorff-deWit-Leask-Charles/p/book/9781642671131?srsltid=AfmBOooQDxaPF-h-Wwzivb3lhHnCrylcaVza6M6qQfgJAHfXwyT0SFGo>

²⁴⁵ Council of the European Union (2023). Europe on the Move – Learning Mobility Opportunities for Everyone. https://youth.europa.eu/news/europe-move-learning-mobility-opportunities-everyone_en

with little or no movement of students²⁴⁶. Such initiatives aim to develop intercultural competencies and language skills, while also enabling participation for those unable to travel abroad. Una Europa's UnaVEx (Una Europa for Virtual Exchange), for instance, illustrates this innovation by connecting 2,500 students from European and African universities through a virtual credit mobility programme. The programme combines massive online open courses (MOOCs) with facilitated discussions on global challenges such as climate change and inequality, providing intercultural learning without the need for physical travel. Evidence from this initiative also highlights an important design insight: while MOOCs (or simply allowing attendance to an online lecture) provide valuable content, they are insufficient on their own to secure sustained student engagement. Instead, the integration of interactive components, whether virtual or physical, is essential to foster active participation and maximise the educational value of virtual mobility schemes.

Blended mobility combines virtual and physical components, offering flexible pathways into international learning. **Blended Intensive Programmes (BIPs)**, for instance, are short-term Erasmus+ funded programmes that link online learning with brief mobility periods at a partner university. The RUN-EU alliance currently offers BIPs on themes such as Design Thinking – Healthcare Challenges and Vital Schools: Designing Movement-Friendly and Sustainable Playgrounds. Similarly, **Short Advanced Programmes (SAPs)** within RUN-EU are transnational courses that integrate blended formats with compulsory short-term mobility, designed collaboratively by at least two alliance members. These programmes target a wide range of learners, including students, staff, professionals, and lifelong learners, and have been applied across diverse fields such as engineering, nursing, and education²⁴⁷.

Most countries across the EEA are actively advancing blended and virtual mobility, while others remain in early or exploratory phases. In many states, these formats are regarded as means to enhance accessibility and inclusion, although concerns persist regarding their quality, monitoring, and administrative complexity. More detailed findings from the cross-country analysis are provided in Annex 2.

European Universities alliances

A European Commission initiative that can contribute substantially to student mobility and international collaboration is the European Universities initiative, launched in 2018. The initiative fosters long-term, strategic, and sustainable cooperation among diverse institutions, including research universities, universities of applied sciences, and arts universities. These alliances also collaborate with non-academic partners, such as

²⁴⁶ Brewer and Leask (2022). Internationalizing the curriculum, teaching, and learning. In: D. K., Deardorff, H. de Wit, B. Leask, H. Charles (Eds.), *The Handbook of International Higher Education*. <https://www.routledge.com/The-Handbook-of-International-Higher-Education/Deardorff-deWit-Leask-Charles/p/book/9781642671131?srsltid=AfmBOooQDxaPF-h-Wwzivb3lhHnCrylcaVza6M6qQfgJAHfXwyT0SFGo>

²⁴⁷ See for further information the Standard Guidelines for RUN-EU SAPs (2022). https://run-eu.eu/wp-content/uploads/sites/30/2024/02/D6_3_Standard-Guidelines-for-RUN-EU-SAPs_final-version.pdf

businesses, public authorities, and civil society, to address real-world societal challenges.

By 2024, the initiative had grown to 65 alliances encompassing 573 higher education institutions across 35 countries, **covering all EU member states**.^{248, 249} While all member states are involved in the European Universities alliances, the degree of involvement in the alliances varies, with some countries reporting high participation rates among their institutions, while others show lower participation rates (see Appendix 2 for further information).

The initiative has significantly expanded opportunities for mobility. The available data outlines a 448% increase of intra-alliance student mobility over the first three years of operations, though by 2025 the target of 50% intra-alliance student mobility was still not reached.²⁵⁰

The alliances foster systemic cooperation and a long-term vision that transcends temporary project logic, leading to structural changes in higher education collaboration. Most alliances have developed joint student mobility strategies (50% have one, 45% are developing one, and 5% have neither a strategy nor plans to develop one) and many alliances have established joint mobility services (32% established, 53% developing, and only 15% have neither established nor are developing them). For instance, Unite! has a Joint Mobility Centre to streamline administrative procedures for mobility, and RUN-EU has a European Mobility Innovation Centre for the same purpose. There is **significant progress towards automatic recognition of ECTS credits and qualifications for intra-alliance mobility**, which is crucial for seamless mobility. Alliances are actively implementing the European Student Card (ESC) (average of 78% of alliance partners use it as of 2023) and the Erasmus Without Paper (EWP) network (34% implemented, 63% planning) to digitalise and simplify mobility administration. These tools reduce administrative burdens, making it easier for smaller and regional universities to fully participate as both sending and receiving institutions. In this way, the initiative helps to mitigate imbalances in mobility that have traditionally favoured large, well-resourced universities.

Mobility activities within alliances are also closely linked to skills development and employability. According to the data provided in the report on the outcomes and transformational potential of the European Universities initiative (EC 2025), **the alliances' activities support preliminary problem-solving skills but also digital skills, green skills, intercultural skills, entrepreneurial skills and democratic competencies**.²⁵¹ Following the interview partners, participation in alliance mobility activities has shown to build self-confidence and enable informed decision-making about mobility, rather than self-exclusion. This appears to be particularly relevant for

²⁴⁸ European Commission. (2023). Factsheet on European Universities alliances. <https://op.europa.eu/en/web/eu-law-and-publications/publication-detail/-/publication/f0e0e83a-47ec-11ef-aea6-01aa75ed71a1>

²⁴⁹ Grumbinaite et al. (2025). Report on the outcomes and transformational potential of the European Universities initiative. <https://op.europa.eu/en/publication-detail/-/publication/db43f6ca-da14-11ef-be2a-01aa75ed71a1/language-en>

²⁵⁰ Ibid.

²⁵¹ Ibid.

students from underrepresented groups, who may otherwise perceive international mobility programmes such as Erasmus+ as inaccessible or not intended for people with backgrounds similar to their own. In this sense, alliance mobility activities can act as a low-threshold entry point to international mobility and help reduce the tendency towards self-exclusion.

The cross-country analysis shows that the expected impact of European Universities alliances on balanced mobility and achieving mobility targets is generally viewed positively (see Appendix 2 for more details). Despite positive expectations, some limitations are noted. **Denmark** reports that while Danish universities are actively involved in the alliances, the impact on credit mobility has so far been limited. Several countries, including **the Netherlands, Germany, Bulgaria, Cyprus, Estonia, Poland, Portugal, and Spain**, provide no information on the expected impact of the alliances.

Joint study programmes and joint European degrees

Frequently described as **mobility-by-design**, joint programmes embed structured mobility windows directly into their curricula, thereby ensuring high levels of student participation in international experiences while removing typical recognition obstacles. When such programmes are developed in partnership with institutions in widening or under-represented regions, they promote balanced circulation. While this format is most often developed at master's level, there is an increasing offer of such joint programmes at bachelor's level. For instance, Una Europa's joint bachelor's degree in European studies has already been successfully launched in 2022 as one of the first of its kind at bachelor level in the EEA. It achieved a one-time enrolment process and included three mobility semesters (funded under Erasmus+).²⁵²

Across EEA countries, the maturity and expected impact of joint programmes vary. A first group of countries, including **Spain, Belgium, and Austria**, reports **extensive participation in joint and double degree programmes**, indicating an established culture of institutional collaboration. A second group, including **Slovakia, Slovenia, and Estonia**, describes **more limited availability or early-stage implementation of these formats**. Only a limited number of country reports address the expected impacts of these programme formats (see Appendix 2 for further information).

The **joint European degree initiative** builds on this foundation. In 2024, the European Commission launched the Blueprint for a European Degree, an initiative to create a type of joint qualification recognised across Europe²⁵³. Over 140 universities have tested it through 6 pilot projects under Erasmus+ in 2023-2024, with the support from national authorities²⁵⁴. The projects mapped a large offer of existing joint programmes, analysed their characteristics, and identified more than 50 types of legal and

²⁵² See for further information 1Europe Annual Report 2021-2022 (2022). https://una-europa.imgix.net/resources/1Europe-Annual-Report_2021-2022_final.pdf

²⁵³ European Commission (2024). Commission rolls out plans for a European degree. https://ec.europa.eu/commission/presscorner/api/files/document/print/en/ip_24_1741/IP_24_1741_EN.pdf

²⁵⁴ European Commission (2024). Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A Blueprint for a European Degree, COM(2024)144 final. https://education.ec.europa.eu/sites/default/files/2024-03/European_Degree_Communication_Graphic_Version_EN.pdf

administrative obstacles to joint degree programmes in national contexts. The pilot outcomes fed directly into the draft set of European criteria that underpin the proposal for the Blueprint for a European Degree. Following the Commission's proposal, the Council of the European Union adopted in May 2025 a resolution establishing a joint European degree label and a related recommendation on a European quality assurance and recognition framework in higher education²⁵⁵. The Council modified the Commission's proposal by endorsing a cautious, three-phase approach through 2029, beginning with the finalisation of the joint European degree label by mid-2026.

2.2.6. Good practices and financial support mechanisms for credit mobility

Study question	What good practices can be identified, including financial support for credit mobility (from EU, national or private sources)?
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Erasmus+ provides the central foundation of European credit mobility, with predictable funding and progressively more inclusive support measures. The European Universities alliances integrate funding models that combine Erasmus+ grants with institutional co-investment and flexible mobility. National and regional schemes further strengthen outward mobility by offering targeted financial assistance, improving administrative processes, and enhancing access to information.

The European landscape for credit mobility demonstrates diverse but complementary financial support models operating at EU, regional, and national levels, each contributing key lessons in accessibility, sustainability, and innovation. The present chapter provides a summary of the evidence stemming from the cross-country analysis with additional insights from a literature review and thematic case studies.

Erasmus+ remains the flagship programme, widely acknowledged as the world's leading international student exchange initiative. As the largest and best-known international exchange programme, Erasmus+ demonstrates how significant, predictable investment at EU level can shape mobility: it finances most of the Union's credit mobility opportunities and supported nearly 400 000 student mobilities in 2023 alone. Its scale, visibility and strong integration into the European Education Area make it a model of how sustained multilateral funding can remove systemic barriers to mobility while maintaining quality and recognition of credits. A key good practice here

²⁵⁵ European University Association (2025). Council of the EU approves vision for a European degree label, EUA welcomes step-by-step approach. <https://www.eua.eu/news/eua-news/council-of-the-eu-approves-vision-for-a-european-degree-label-eua-welcomes-step-by-step-approach.html>

is the programme's **progressive development of inclusion measures**, such as top-up grants for disadvantaged students, which improve access and equity.

Building on this EU framework, the **European Universities alliances** (EUAs) represent a transformative model of transnational cooperation among higher education institutions. Emerging from the European Universities Initiative, EUAs integrate funding models that combine Erasmus+ grants with institutional co-investment, fostering (long-term) **ownership and financial stability**. They promote **innovative and flexible mobility formats**, such as BIPs, designed to reduce barriers and broaden participation. Several surveys confirm the potential of BIPs to enhance digital, intercultural, and teamwork competences while also lower barriers to internationalisation (cost, time, inclusiveness).^{256,257} Leveraging advanced **digital tools**, including elements such as the European Student Card and blockchain for secure credit recognition, EUAs streamline administrative procedures and enhance transparency. Their joint governance structures and partnerships with regional stakeholders align mobility programmes with broader socio-economic goals. Additionally, dedicated efforts to institutionalise diversity, equity, and inclusion strategies further support underrepresented groups.

Alongside EU-level actions, national and regional frameworks play an essential complementary role. Several countries provide supplementary financial support to encourage outward mobility, particularly for higher education students from disadvantaged backgrounds. Appendix 2 provides illustrative country examples for these financial support mechanisms.

In addition to financial support, several countries have developed measures to streamline administrative procedures and improve access to information (see Appendix 2 for illustrative country examples).

Collectively, these diverse approaches underline a set of core **good practice principles**:

- Provide stable and predictable funding at EU, pan-European, regional, and national levels.
- Encourage co-investment and resource pooling to ensure sustainability and maximise impact.
- Design inclusive and flexible mobility formats to accommodate varied learner needs and reduce barriers.
- Utilise digital innovation to simplify credit transfer and administrative burdens.
- Establish shared governance and institutional commitment for coordinated and efficient resource use.
- Embed and strengthen equity-focused strategies to broaden accessibility and support underrepresented groups.

²⁵⁶ Alves Lopes, A.. (2025). BLENDED INTENSIVE PROGRAMME FOR ENHANCING KNOWLEDGE AND SKILLS TOWARDS THE USE OF ARTIFICIAL INTELLIGENCE BY PHYSIOTHERAPY STUDENTS. [10.21125/edulearn.2025.1684](https://doi.org/10.21125/edulearn.2025.1684)

²⁵⁷ O'Dowd, R. and Werner, S.. (2024). The First Steps of Blended Mobility in European Higher Education: A Survey of Blended Intensive Programmes. <https://doi.org/10.1177/10283153241235704>

2.3. Inclusive mobility

2.3.1. Conceptualising inclusive mobility

Study question	What concept of ‘inclusive mobility’ pertains based on the definition in the Erasmus+ Programme and the Europe on the move Council Recommendation?
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Under the Erasmus+ Programme and the Europe on the Move Council Recommendation, inclusive mobility refers to a policy objective whereby students facing structural, socio-economic, health, geographic or other barriers are enabled to participate in learning mobility on comparable terms to other students, through targeted financial and support measures. This concept is operationalised via a broad EU-level definition of “people with fewer opportunities”, which is intentionally adapted at national (and sometimes institutional) level, prioritising the removal of systemic barriers over uniform cross-country comparability.

The concept of inclusion has been invoked in different forms throughout EU policy documents linked to student mobility, but it is through the concept of participants (or, for the purpose of this report, students) ‘with fewer opportunities’ that it is currently²⁵⁸ operationalised in policy and programme monitoring and planning. The concept is primarily elaborated in two key documents.

The **Council Recommendation ‘Europe on the Move’**²⁵⁹, stated that ‘Member States will continue to make efforts to make learning mobility more inclusive by aspiring to collectively achieve a share of **at least 20%** of people with fewer opportunities among all learners benefiting from learning mobility abroad at EU level by 2027’. While the Recommendation makes explicit reference to Erasmus+, it also expresses the aim to extend this objective, where possible, to ‘other learning mobility schemes throughout the EU’.

To serve as the basis for a possible future 2030 EU-level target, the Recommendation invites the Commission to propose by 2026 a methodology to ‘*measure the share of people with fewer opportunities among all learners benefiting from learning mobility abroad*’, based on and with the expert opinion of the Standing Group on Indicators and Benchmarks. It also suggests the use of data already collected under Erasmus+ and the European Solidarity Corps as an initial reference, understanding it as a working proxy rather than as a full representation of intended scope, which includes ‘*all learners benefiting from learning mobility abroad in education, training and youth and sport sectors*’. To further clarify the concept, the Recommendation provides a list of barriers

²⁵⁸ The concept of ‘disadvantaged students’ had been previously in use.

²⁵⁹ <https://data.consilium.europa.eu/doc/document/ST-9804-2024-INIT/en/pdf>

that coincides with that of the Erasmus+ Programme Guide presented below, with a special mention for students in outermost regions.

In the context of the **Erasmus+ Programme Guide 2026**²⁶⁰, ‘participants with fewer opportunities’ are defined as *‘people who, for economic, social, cultural, geographical or health reasons, a migrant background, or for reasons such as disability and educational difficulties or for any other reasons, including those that can give rise to discrimination under article 21 of the Charter of Fundamental rights of the European Union, face obstacles that prevent them from having effective access to opportunities under the programme’*.

The concept is utilised in eligibility and financing rules for participating organisations. For individual participants, those under this category are eligible to receive both a flat-rate top-up grant (additional to what all participants from the same territory of origin receive), and, on a case-by-case basis, ‘inclusion support’ in the form of reimbursements for specific expenses required to enable their participation in the mobility activities (typically linked to physical, mental or health conditions).

By design, the Programme Guide provides a broad definition that gives national authorities, together with National Agencies, substantial scope to adapt it to their specific contexts. Cross-country analysis shows that **national definitions vary widely, and in some cases are further delegated to the level of individual higher education institutions**²⁶¹. National approaches range from first-generation student status (e.g. **Austria**) to income-based criteria (e.g. **France, Italy, Portugal**) to full institutional autonomy in setting the definition (e.g. **Latvia, Lithuania**²⁶²). A full mapping of national definitions is provided in the Annex 2 section 1.3.2.^{263 264 265 266}

It is notable that between the 2020 and 2021 Erasmus+ Programme Guides, **the definition of “people with fewer opportunities” expanded both in scope and in specificity**. While the 2020 guide already listed core categories-disability, educational difficulties, economic obstacles, cultural differences, health problems, social obstacles, and geographical obstacles-the 2021 guide significantly broadened and deepened these categories²⁶⁷. Cross-country analysis of national-level data indicates that

²⁶⁰ <https://erasmus-plus.ec.europa.eu/erasmus-programme-guide>

²⁶¹ Though the Erasmus+ programme does not publish a compilation on how the different national authorities define ‘fewer opportunities’ in technical terms, the platform [InclusiveMobility.eu](https://inclusionmobility.eu) provides related information and links on at least some of the Member States. This platform, is the result of the EPFIME project (co-funded by the EU).

²⁶² Interview with NCP.

²⁶³ Van Veens, V. et al. (2022). *Making mobility programmes more inclusive: inclusive mobility: from policy to inspiration*. Support Centre Inclusive Higher Education. <https://www.siho.be/sites/default/files/214162%20ARTEVELDE%20-%20Mobility%20BOOKLET%20TwinDesign%20%289%29.pdf>

²⁶⁴ The National Agency for Community Programmes in the Fields of Education and Vocational Training. <https://en.anpcodf.ro/>

²⁶⁵ <https://eu.daad.de/programm-und-hochschulpolitik/erasmus-ab-2021/erasmusplus-soziale-teilhabe/de/86053-definition-der-zielgruppen-studierende-mit-geringeren-chancen-in-deutschland/>

²⁶⁶ https://www.erasmusplus.it/istruzione_superiore/mobilita/

²⁶⁷ First, several groups became explicitly named for the first time: young people not in education, employment or training; people with structural barriers created by education and training systems; newly arrived migrants; sign-language users; people facing linguistic adaptation difficulties; caregivers; breadwinners; people living or previously living in institutional care; and those facing intersectional discrimination. Second, the 2021 guide reframed the definition toward a more systemic, barrier-based approach, emphasising how educational systems, discrimination, and cultural or linguistic contexts themselves create obstacles, rather than focusing mainly on individual disadvantages. Third, the new guide introduced stronger nuance in social barriers, extending the list to include parents (particularly single parents), caregivers, people with social marginalisation, and people whose family circumstances limit participation. Overall, the 2021 version made the definition more inclusive, detailed, and aligned with contemporary social policy, ensuring that a wider and more precisely defined set of disadvantaged groups is formally recognised within Erasmus+.

national stakeholders in several countries (including Latvia, Lithuania and Malta) largely attribute the observed increase in the share of Erasmus+ mobilities involving people with fewer opportunities (ISCED 5–7) to the broadening of the programme definition, rather than to a substantial shift in outreach strategies or participation patterns (see Annex 2 for more details).

Taken together, the Council Recommendation and the Erasmus+ Programme Guide establish that **inclusive mobility** is a policy goal of equal participation, grounded in a **barrier-based** rather than a deficit-based understanding: the question is whether the education system provides adequate support, not what the student is or can do.²⁶⁸²⁶⁹ Because each programme country adapts the umbrella definition to its own context, data on participation rates of people with fewer opportunities are **not directly comparable across countries** – an intentional trade-off that the Council Recommendation’s call for a common cross-EU methodology seeks to address. A full elaboration of the conceptual framework inferred from these two sources is provided in the Annex 2.

2.3.2. Recent trends and patterns in inclusive mobility

The present section provides an overview of the recent trends across different aspects of inclusive learning mobility in Europe, setting the background for more specific study questions that follow.

Gender dimension in inclusive mobility

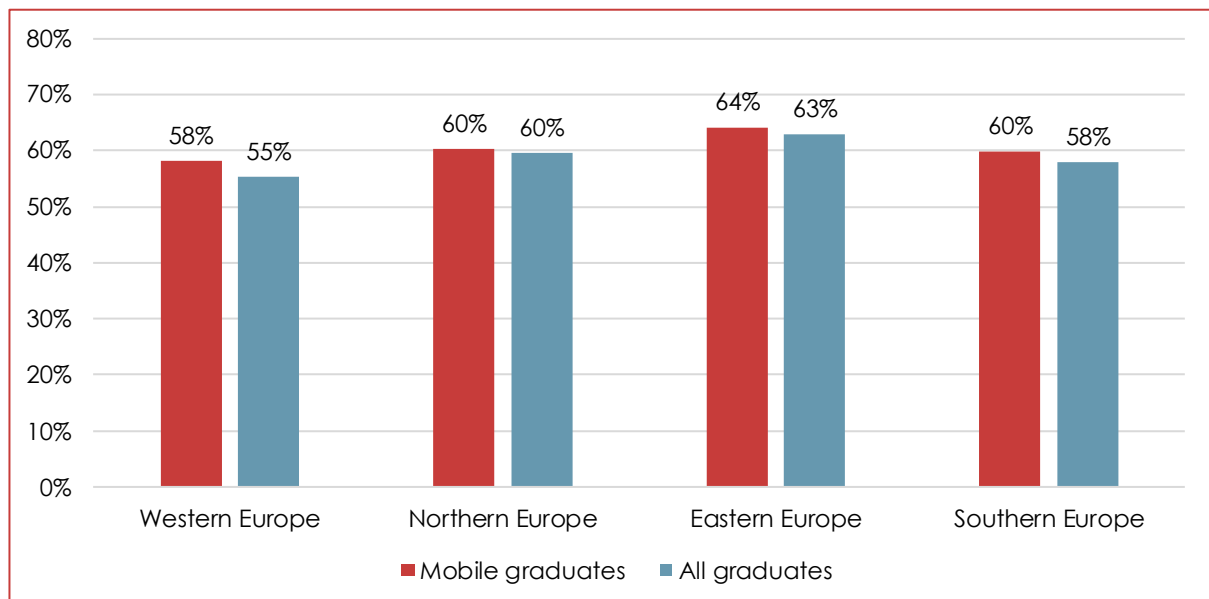
The bar graph below shows the share of credit mobile graduates (who spent at least three months abroad throughout the programme through a study period and/or work placement) that were female in 2023. The graph compares the share of females among credit mobile graduates in 2023 compared to the share of female graduates overall.²⁷⁰

268 Van Mol, C., & Perez-Encinas, A. (2022). Inclusive internationalisation: do different (social) groups of students need different internationalisation activities?. *Studies in higher education*, 47(12), 2523–2538. <https://doi.org/10.1080/03075079.2022.2083102>

269 This is in line with the definition of ‘inclusive mobility’ by the Inclusive Mobility Alliance, linked to the PLAR-4-SIMP project (Peer Learning Activities and Resources for Social Inclusion in Mobility Programmes): ‘*creating and ensuring adequate conditions to learn, work, or volunteer abroad for people with fewer opportunities, by addressing their diverse support needs. It is a needs-based approach to what the individual beneficiary needs to ensure a safe and exciting mobility period abroad. It is important to not generalise needs; needs are specific and the individualised aspect is highly important.*’

270 Eurostat (2023): [Credit mobile graduates \(at least 3 months abroad\) by education level, country of destination, type of mobility and sex](#) and [Graduates by education level, programme orientation, completion, sex and age](#)

Figure 11: Share of female graduates among credit mobile and total graduates by country of origin, grouped by sub-regions (2023).



Source: Eurostat. Figure prepared by the study team. Regional grouping based on the United Nations' Geoscheme. [Link](#).

Furthermore, the share of females who participated in credit mobility was higher across all regions than the share of females who graduated from tertiary education. The share of female credit mobile graduates and overall graduates was fairly similar across all regions of Europe, with eastern Europe showing a slightly higher share of female participation compared to the other regions. The EU-27 average for female credit mobility participation was 59%, compared to 58% for overall female graduates, indicating that the gender distribution in credit mobility closely mirrors that of tertiary education overall. Country-level data are provided in the Annex 2 section 1.3.1.

This distribution has remained largely stable over the 2016–2023 period, with only minimal changes in either direction. Longitudinal data are provided in the Annex 2.

Students with fewer opportunities

Erasmus+ currently provides the most reliable and comparable proxy for monitoring the participation of people with fewer opportunities in international learning mobility, as most Member States do not yet systematically track inclusiveness across mobility schemes. However, it is important to note that the 2023 Council Recommendation²⁷¹ does not provide a harmonised definition of people with fewer opportunities, nor does it explicitly specify whether the 20% inclusion target applies to degree mobility, credit mobility, or both. In parallel, a Eurostat taskforce has been established to work towards a common international definition. Complementary frameworks from the EHEA Bologna Follow-up Group provide additional conceptual angles but are not yet operationalised at a technical level (see Annex 2 for detail).

Based on Erasmus+ reporting, 20.5% of outgoing student participants at ISCED levels 6–8 in 2024 were identified as having fewer opportunities. While this figure exceeds the 20% benchmark set in the Council Recommendation for 2027, it should be

²⁷¹ <https://data.consilium.europa.eu/doc/document/ST-9804-2024-INIT/en/pdf>

interpreted with caution, as it reflects Erasmus+-specific definitions, coverage and reporting practices, rather than a fully harmonised measure of inclusiveness across all forms of learning mobility.

As noted in Section 2.3.1, the definition of persons with fewer opportunities was substantially expanded between the 2014–2020 and 2021– Erasmus+ Programme Guides. Cross-country evidence suggests that the post-2021 increase in recorded shares in several countries (including Latvia, Lithuania, and Malta) largely reflects this definitional expansion rather than substantive changes in outreach (see Annex 2 for the expanded categories).

The aggregate figures mask important regional disparities. Participation is significantly higher in Southern Europe (25.5%) and Western Europe (22.2%), compared to Northern (9.4%) and Eastern Europe (8.3%). Germany (39%) and Malta (93%) are notable outliers that substantially influence their respective regional averages. The lower reported shares in Northern and Eastern Europe should not be interpreted as evidence of weaker inclusion policy: generous national student support systems reduce reliance on Erasmus+ top-up mechanisms, and some CEE countries' base grants alone match or exceed combined base-plus-top-up grants in some Western European systems. The detailed funding analysis is provided in the Annex 2.

As discussed in Section 2.3.1, the broad and nationally adapted definition of persons with fewer opportunities means that country-level participation rates are not directly comparable.

Table 7: Share of outgoing Erasmus+ students with fewer opportunities across European regions in 2024.

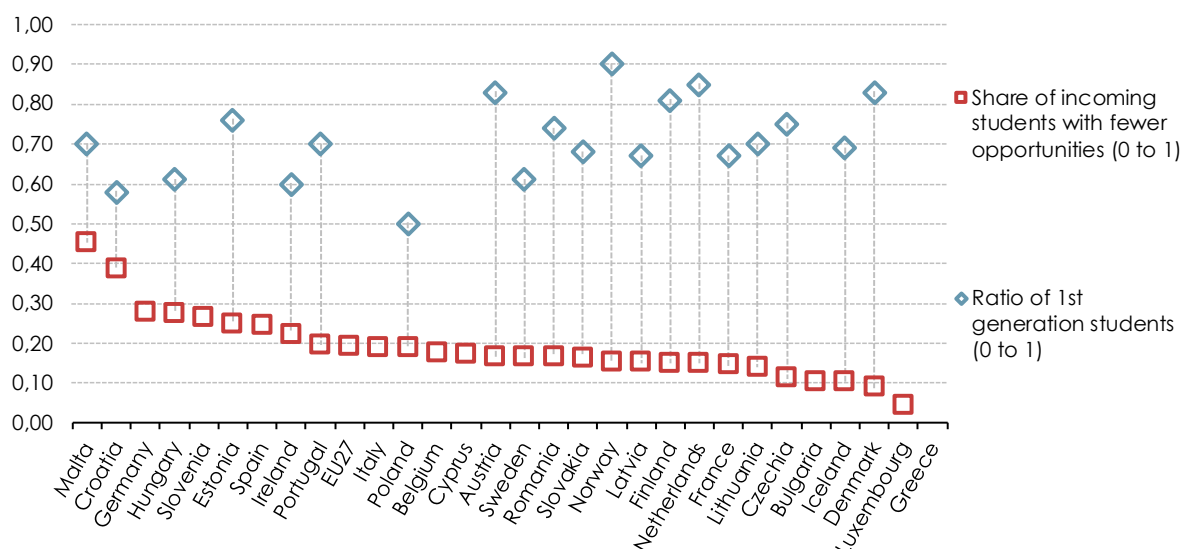
Indicator	Northern Europe	Southern Europe	Western Europe	Eastern Europe	EU-27 + Iceland and Norway Average
Share of outgoing Erasmus+ participants with fewer opportunities (e.g. due to disability, low income) ²⁷² at ISCED 6-8 level (Erasmus+ data)	9.36%	25.54%	22.23%	8.31%	20.51%

Source: Prepared by the study team, based on Erasmus+ data.

²⁷² Participants with "Fewer opportunities" means people who, for economic, social, cultural, geographical or health reasons, a migrant background, or for reasons such as disability and educational difficulties or for any other reasons, including those that can give rise to discrimination under article 21 of the Charter of Fundamental rights of the European Union, face obstacles that prevent them from having effective access to opportunities under the programme. National definitions vary.

Figure below further contextualises inclusiveness by combining data on the share of incoming Erasmus+ students with fewer opportunities, along with the ratio of first-generation students among surveyed students participating in Erasmus+ programme. This ratio measures the relative mobility rate of students whose parents did not attain tertiary education compared with those whose parents did. A ratio closer to 1 indicates more equitable participation between the two groups, while lower ratios highlight persistent gaps in access to mobility linked to socio-economic background. The data show wide variation across Europe: in some countries, the ratio is close to parity, suggesting inclusive mobility practices, whereas in others, first-generation students remain significantly underrepresented compared to their peers from tertiary-educated families.

Figure 12: Share of students with fewer opportunities and ratio of 1st generation students participating in Erasmus+ learning mobility (2022)²⁷³



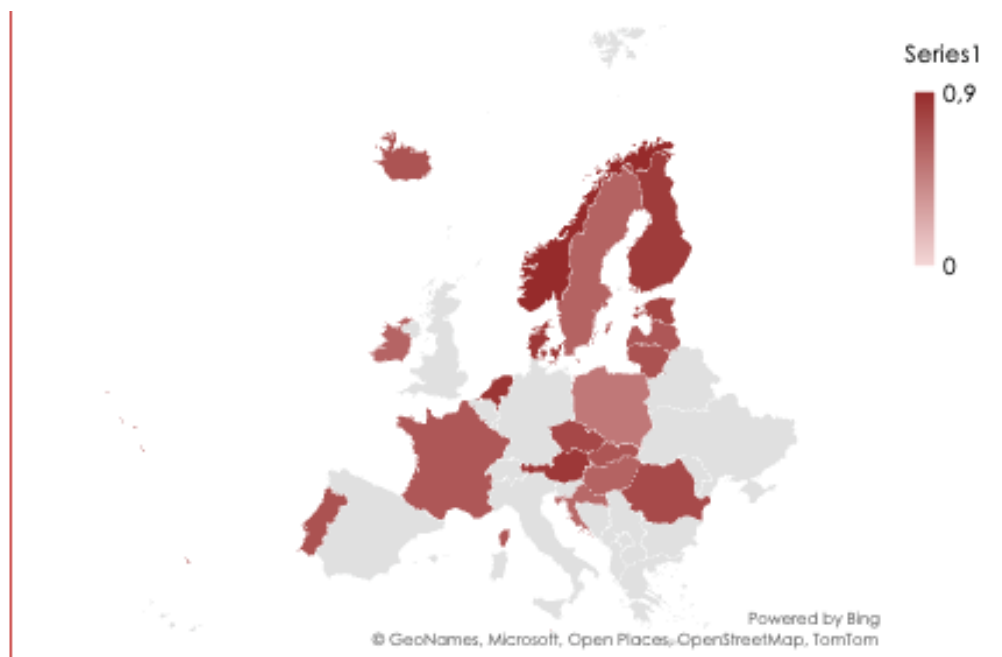
Source: Study team, EHESO data (Latest data available as of 09-2025).

Figure below maps the first-generation student participation ratio by country. Countries with ratios closest to 1 (most equitable) are concentrated in Northern and Western Europe; lower ratios in Southern and Eastern Europe indicate that socio-economic background remains a stronger predictor of mobility participation in those systems. Country-level ratios are provided in the Annex 2.

²⁷³ Indicator 1: Share of incoming and outgoing short cycle, bachelor's and master's students with fewer opportunities with support from the Erasmus+ programme in the incoming and outgoing student population at the same level

Indicator 2: The ratio between the mobility rate of students whose parents did not attain tertiary education (first-generation students) and the mobility rate of students with at least one parent who completed tertiary education (non-first-generation students) at short cycle, bachelor's, and master's levels.

Figure 13: Likelihood of first-generation students participating in learning mobility



Source: Study team, EHESO data (Latest data available as of 09-2025).

2.3.3. Policy effects and future trends in inclusive mobility

Study question	Is it possible to show the impact of EU/national/institutional policies on inclusive mobility? What future trends could be identified (including by analysis of the effect of innovative forms of mobility)?
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Inclusive mobility is being strengthened by EU, national and institutional policies, but their impact is still mostly visible in qualitative signs of progress rather than robust quantitative data.

Evidence points to inclusive learning mobility evolving towards mainstreamed policy integration, more targeted and innovative forms of support, and stronger use of data to guide future developments

Impact of policies on inclusive mobility

Taken as a whole, the country case study reports demonstrate some effects of EU, national and institutional policies on inclusive mobility; however, that impact is predominantly evidenced through qualitative and descriptive information rather than robust and systemic quantitative data and indicators. Building on this analysis, the findings indicate that EU, national and institutional policies have contributed to widening participation in learning mobility, with EU frameworks – particularly Erasmus+ – providing direction, legitimacy and incentives, while national and institutional actors

largely determine implementation. On this basis, the cross-country analysis points to several key messages regarding the impact of these policies on inclusive mobility:

- **EU-level policies**, particularly Erasmus+ inclusion priorities, are cited by almost all countries as a central driver of inclusive mobility and are described as providing direction, legitimacy or incentives and, in several cases, as setting a common language and agenda for inclusion.
- **National policies** support inclusive mobility through funding arrangements, social support systems and higher education governance structures, as well as targeted national measures (such as top up grants, social inclusion instruments or dedicated national strategies) that are generally aligned with EU objectives and help to address remaining financial and structural barriers to participation.
- **Institutional policies** are consistently identified across country reports as the main point where inclusion becomes operational, with higher education institutions developing support structures, local solutions, awareness-raising initiatives and individualised support, although the level of formalisation and consistency of these arrangements varies across systems and institutions.
- While **countries** broadly agree on the importance of inclusive mobility, they **differ significantly in how far policies have developed and how impact is described**, with some relying mainly on qualitative descriptions of change and others more often referring to participation levels or system stability

The detailed country case study findings underlying these key messages are presented in Annex 2 section 4.3.3.

Future Trends

Beyond the current policy impacts, the country reports also provide an insight into how inclusive mobility is likely to evolve in the future. Together, they point to several emerging trends in policy design, funding and implementation:

- Inclusion becoming a mainstream expectation within higher education and internationalisation strategies.
- Continued expansion and differentiation of targeted financial support for people with fewer opportunities.
- Stronger focus on monitoring, evaluation and evidence of impact.
- Increased use of short-term, blended and flexible mobility formats as tools for inclusion.
- Further professionalisation of institutional roles and support structures for inclusive mobility.

The detailed country-level evidence underpinning each of these trends is set out in the Annex 2.

2.3.4. Good practices, obstacles and financial support for inclusive mobility

Study question	What good practices and obstacles can be identified, including financial support for inclusive mobility?
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2.3.4.1. Obstacles for inclusive mobility

Despite progress, students with migratory backgrounds, disabilities, and less financial means are still less likely to engage in learning mobility.

Despite progress, students with migratory backgrounds, disabilities, and less financial means are still less likely to engage in learning mobility. Evidence shows that financial costs, the risk of losing income from paid work, social factors, practical hurdles, disability-related issues, and lack of information all contribute to lower participation for these groups. These barriers tend to accumulate for students who are already disadvantaged in higher education, reinforcing existing inequalities in access to mobility. This section provides a concise overview of the main patterns, while detailed evidence, including country-level data and statistical results, is presented in Annex 2 section 1.3.4.

- **Financial burden:** Across countries, financial costs remain one of the most frequently reported barriers to learning mobility, particularly for students from less advantaged socio-economic backgrounds, with migratory backgrounds, or with impairments that limit their studies. Financial barriers include both the direct costs of going abroad and the potential loss of income from paid work at home, and they are only partially offset by existing support schemes.
- **Social factors:** Social barriers such as separation from family, partners, children, and social networks can deter students from participating in mobility. While some disadvantaged groups report strong social obstacles, more detailed analysis shows that social barriers are not concentrated only among traditionally underrepresented students and can also be perceived as significant by students from well-off or non-migrant backgrounds.
- **Practical limitations:** Students often face fragmented procedures for recognition of credits, differing requirements for financial aid, and complex administrative steps for disability support or residence permits. These practical obstacles are especially burdensome for students who already find it challenging to navigate higher education systems and are reported more frequently by those from less advantaged backgrounds.
- **Disability status and lack of facilities:** Students whose disabilities impair their studies encounter multiple mobility-related obstacles, including programme-related, health-related, and logistical challenges. They systematically report higher levels of practical and informational barriers than students without impairments, and international evidence points to additional costs and gaps in support that further restrict their participation.

- **Lack of information:** Many students do not consider mobility simply because they are unaware of opportunities, support schemes, or relevant institutional services. Information and outreach strategies often fail to reach all student groups equally, and students with impairments in particular are more likely to see lack of information as a major obstacle.

2.3.4.2. Good practices for inclusive mobility

Member States have adopted various measures to overcome the most common obstacles preventing students from engaging in mobility.

Countries and higher education institutions have introduced a range of measures to make learning mobility more inclusive for students from underrepresented or disadvantaged groups. These measures typically combine targeted financial support, more flexible mobility formats, curriculum changes, and improved guidance and monitoring; the detailed descriptions, country examples and data sources are presented in Annex 2.

- **Financial inclusion measures:** Several systems use additional grants and allowances specifically aimed at people with fewer opportunities, complementing standard mobility funding to better cover living costs and extra expenses linked to disadvantage. Despite this progress, mobility-related financial support for disadvantaged students is often embedded within broader student support schemes rather than being designed as dedicated instruments, which can limit visibility and targeted monitoring.
- **Short-term and blended mobility formats:** The expansion of short-term and blended mobility has become a key lever for inclusion, offering more adaptable options for students who cannot commit to long-term stays abroad. These formats can reduce financial, family-related and work-related barriers, and have been widely promoted within current mobility programmes as a way to broaden participation.
- **Embedding internationalisation into the curriculum:** Integrating international and intercultural elements into regular degree programmes helps ensure that mobility-type learning outcomes are not restricted to students who can go abroad. Approaches such as mobility windows and curriculum-embedded internationalisation make these opportunities more accessible to students constrained by financial, family or employment obligations.
- **Monitoring, data collection and guidance tools:** European-level platforms and projects have developed practical resources, guidance materials and toolkits to support inclusive mobility strategies, including for specific groups such as students with disabilities, refugees and first-generation students. However, many of these initiatives face challenges in maintaining up-to-date information and ensuring long-term sustainability, which limits their full potential as a permanent support infrastructure.

3. Key results of the foresight analysis

3.1. Introduction

The foresight analysis undertaken in the current project aims to provide a set of **future scenarios on balanced and inclusive learning mobility** – two key concepts of the current study – with the objective to inform policies targeted at the achievement of the 2030 EU mobility targets.

The foresight analysis adopts a **five-year time horizon**, in line with the 2030 deadline for achieving the EU mobility targets. While the initial stages of the foresight analysis addressed learning mobility in general (see Annex 3), the co-design of scenarios focuses exclusively on degree mobility. This explicit focus is based on two key findings emerging from the study evidence: (i) degree and credit mobility follows distinct pathways and are driven by different factors, resulting in divergent developmental dynamics; and (ii) degree mobility flows are particularly important for both inclusiveness and the geographical balance of mobility.

As detailed in Chapter 2.1, degree mobility flows are considerably different in each EU Member State and region, with net senders and net receivers, contributing to persistent challenges such as talent concentration, skills shortages, and uneven territorial development-issues that are less pronounced in the case of credit mobility. The complexity and strategic importance of degree mobility, together with its direct links to national competitiveness, labour market integration, and EU-level cooperation, underscore its relevance for the scenario-building exercise in the field of learning mobility. By focusing on degree mobility, the foresight analysis aims to anchor the scenarios in one of the core structural challenges facing EU higher education systems. Furthermore, the scenarios concentrate specifically on intra-EU degree mobility, in line with the report's findings on the predominance of EU mobile learners within degree mobility flows (see Chapter 2.1).

3.2. Scenarios for the future of balanced and inclusive intra-EU degree mobility

Following the 2x2 Matrix method, detailed in the foresight analysis methodology (see section 1.2. in this Annex 3), four contrasting scenarios were identified. The four scenarios are constructed along the two drivers identified as both the most impactful and the most uncertain through consultations with stakeholders and country experts involved in the study. Each scenario reflects the contrasting effects of these drivers:

- **Financial conditions** (most impactful driver) and their effects:
 - *Lower impact of financial conditions*: Low or well-supported study costs-through grants, fee waivers, portable financial aid, and targeted top-ups-reduce the extent to which household income determines access to mobility.

- *Higher impact of financial conditions*: High costs of studying abroad, limited grant availability, and income insecurity mean that household wealth largely determines who is able to participate in mobility.
- **Geopolitical context** (most uncertain driver) and its effects:
 - *Geopolitical stabilisation and renewed integration*: Improved stability and deeper integration strengthen cohesion within the EU, facilitating smoother cooperation and higher levels of student and graduate circulation.
 - *Deteriorating geopolitical relations and rising international tensions*: Increased instability reduces mobility flows, makes certain destinations less attractive, and reinforces existing imbalances as students concentrate in a limited number of perceived “safer” systems.

The matrix below provides an overview of how the four scenarios are positioned within the scenario framework, together with a brief description of their underlying logic. Further detail is provided in the following paragraphs.

Figure 14: Overview of scenarios for the future (2030) of balanced and inclusive intra-EU degree mobility.



3.2.1. Scenario 1 (2030): More inclusive, but territorially imbalanced mobility under geopolitical insecurity

This scenario develops along the following axes:

- **Financial conditions less impactful:** low or well supported study costs (grants, fee waivers, portable aid, targeted top ups) make household income much less decisive for mobility.
- **Deteriorating geopolitical relations and rising international tension reduce mobility flows and make some destinations less attractive,** reinforcing clustering in a few “safer” systems.

Core scenario logic

Inclusion without confidence produces equity in mobility access, but limited circulation

By 2030, intra-EU degree mobility unfolds in a context of persistent geopolitical insecurity, marked by heightened risk perception, reduced predictability and uneven trust between Member States. While not triggering the collapse of the EU, this context creates persistent unpredictability regarding political stability, welfare coordination, residence security and labour-market prospects across the EU. At the same time, household financial conditions become less decisive for initial access to degree mobility, not because costs of undertaking mobility diminish, but because part of the financial risk associated with long-term mobility is partially socialised through public instruments.

In a context where the legitimacy of the EU framework is under continuous pressure determined by geopolitical tensions and uprising far right parties and movements in EU MS, cutting or not dismantling EU inclusion-oriented support both within the mobility area and beyond becomes politically difficult and risks to further weaken the EU legitimacy. As a result, EU level instruments promoting inclusivity in the mobility area (e.g. support to Erasmus Mundus programmes, including also scholarships for covering living costs, and specific support to students with disabilities, Skills and Education Portfolio Guarantee Product offering guaranteed loans to individual learners) and more in general social cohesion (e.g. ESF+), benefitting also mobility (e.g. through combined support), are preserved and in some cases reframed as tools of social cohesion and EU legitimacy rather than purely mobility enhancing tools, even though with uneven implementation at national and regional levels. Additionally, even under geopolitical fragmentation, many Member States (MS) continue to support mobility costs selectively where this aligns with domestic labour-market, institutional or social policy objectives and where EU cohesion-oriented funding limits national fiscal exposure.

The combination of EU and national tools functions as a baseline stabiliser, **lowering partially financial accessibility barriers** to mobility and making long-term mobility financially conceivable for a more socially diverse group of students. Financial barriers are therefore lowered compared to the past, even though **coverage of financial burden** remains **uneven across EU MS and regions**.

Despite this improvement in affordability, mobility confidence declines. Geopolitical uncertainty, amplified by media and social media narratives, leads students to approach degree mobility as a risk-management decision. Destination choice increasingly prioritises perceived safety, administrative reliability, welfare predictability and access to student employment, outweighing academic prestige or long-term integration prospects. As a result, **mobility volumes stagnate or decline** and flows **cluster** in a **limited number of destinations** perceived as stable and secure.

Degree mobility thus becomes more socially inclusive in principle, but more geographically constrained in practice. Students from lower-income households gain formal access to degree mobility, yet participation concentrates in countries and regions perceived as secure and where public support systems, labour markets and institutional arrangements are considered reliable under uncertainty. This clustering **reinforces imbalances between EU MS**, even though financial access has improved.

For **sending countries** outside these “safe clusters”, the combination of improved access and risk-driven destination choice unintentionally accelerates one-directional flows and graduate retention abroad, exacerbating labour shortages and demographic pressures. **Receiving countries** benefit from inflows and skills retention, but may face tipping points where housing pressure, institutional capacity constraints and local labour-market tensions begin to offset these gains.

Overall, this scenario reflects a fundamental tension: partial income substitution and reduced financial barriers expand access to degree mobility, but geopolitical insecurity suppresses confidence and circulation. Inclusion improves without producing balance. Financial support stabilises diversified participation, yet without geopolitical trust and coordinated risk-sharing or strong return incentives, it cannot generate diversified destinations, reciprocal flows or sustained student circulation.

3.2.2. Scenario 2 (2030): More inclusive mobility, but only partially balanced circulation in a cohesive Europe

Inclusion expands, but territorial balance requires management of flows asymmetry within EU

This scenario develops along the following axes:

- **Financial conditions less impactful:** low or well supported study costs (grants, fee waivers, portable aid, targeted top ups) make household income much less decisive.
- **Geopolitical stabilisation and renewed integration strengthen cohesion within the EU**, enabling smoother cooperation and higher circulation of students and graduates.

Core scenario logic

By 2030, intra-EU degree mobility takes place in a context of geopolitical stabilisation and renewed EU integration, which makes it **easier to access** and **more predictable to plan**. Geopolitical stabilisation reduces safety risks (both real and perceived), reducing risk aversion to mobility among learners and institutions, while strengthened EU coordination improves the functioning of administrative, legal and institutional

frameworks relevant for degree mobility. At the same time, financial barriers no longer act as the main gatekeeper. This does not result from a single EU funding expansion, but from coordinated multi-level action: EU frameworks enable portability of aid, co-financing and common standards; MS align grant systems and cost of living support to varying degrees; and higher education institutions complement these measures through tuition waivers and other types of support (e.g. housing support, integration services). Together these mechanisms narrow the affordability gap between the different social categories of students, favouring broader and more socially diverse students' participation in degree mobility.

However, this scenario recognises that **inclusive access alone cannot eliminate existing asymmetries in mobility flows** among EU MS. Even in a context of geopolitical stability and renewed EU integration destination preferences, language and labour-market conditions still steer students towards specific EU MS and regions. As a result, no automatic equilibrium of mobility flows among the EU MS emerges, even though a partial rebalancing of flows can occur to some extent and in an asymmetric way following more inclusive and circulatory flows.

Scenario 2 refers, thus, to a high-cohesion and high-access to degree mobility future. Degree mobility becomes more socially diverse because costs and uncertainty are reduced through stronger EU integration, EU MS institutional cooperation in the field of higher education and increased digitalisation of educational institutions. Improved predictability, stronger cooperation and better information broaden the range of destinations considered viable, supporting some degree of diversification and more reciprocal flows, particularly in areas and disciplines where institutional partnerships and circulation mechanisms are actively developed result in an increase in EU mobility flows, even though they do not explode as students' mobility is shaped also by other conditions beyond geopolitical stability (e.g. preference for staying home or using short or blended mobility). However, even in the absence of a sharp increase in mobility flows, steady outflows – following improved access - expose sending countries to social and economic vulnerabilities (e.g. brain drain, labour market shortages, worsened demographic balance) especially if receiving countries successfully retain graduates. At the same time, they can also expose receiving countries and regions to continuous social, educational and labour market pressure especially in those destinations where inflows surpass capacity and benefits from mobility.

Scenario 2 underlines that removal of financial obstacles to mobility alone doesn't neutralise the underlying economic, reputational, linguistic, and labour-market asymmetries across EU MS. In a context of geopolitical certainty, long-term mobility – as the degree one – will continue to be shaped by labour market and economic prospects in both sending and receiving destinations. This reflects a **key tension: inclusive access can unintentionally accelerate selective outflows** unless **policies explicitly supporting students' circularity** (e.g., return grants, recognition of experience, cross-border traineeships linked to home regions) are put in place to balance intra-EU degree mobility flows.

3.2.3. Scenario 3 (2030): Restricted and territorially concentrated mobility under geopolitical fragmentation

Degree mobility survives only as a privilege, not as a policy instrument

This scenario develops along the following axes:

- **Financial conditions very impactful:** study abroad costs, limited grants and income insecurity mean household wealth largely determines who can be mobile.
- **Deteriorating geopolitical relations and rising international tension reduce mobility** flows and make some destinations less attractive, reinforcing clustering in a few “safer” systems.

Core scenario logic

By 2030, intra-EU degree mobility in higher education operates within a continuing but weakened EU institutional framework. Free movement and cooperation frameworks formally remain in place, yet their practical effectiveness is reduced by geopolitical instability and political tensions between EU MS triggering quietly deprioritisation, administrative caution and growing socio-economic inequality. **Degree mobility** does not collapse, but it **survives as a selective and elite phenomenon** rather than a shared European experience. It becomes smaller in scale, highly selective and socially stratified, risk-averse, and geographically volatile, shaped by shifting perceptions of safety rather than stable academic or economic hierarchies. In this scenario, mobility increasingly mirrors and amplifies inequalities rather than counteracting them. It ceases to function as a strategic tool for cohesion or inclusion. Instead, it becomes a private investment strategy for students with financial resources, strong family support and high-risk tolerance. For many others, degree mobility becomes too risky and costly to participate in.

Thus, this scenario depicts a future in which **financial inequality** and **geopolitical fragmentation carve out the transformative potential of intra-EU degree mobility**. Additionally, some regions experience improved balance not through inclusion or labour market opportunities and academic reputation, but through risk and cost induced immobility.

3.2.4. Scenario 4 (2030): Stable and more reciprocal, but socially stratified mobility in a renewed EU

This scenario develops along the following axes:

- **Financial conditions very impactful:** study abroad costs, limited grants and income insecurity mean household wealth largely determines who can be mobile.
- **Geopolitical stabilisation and renewed integration strengthen cohesion within the EU,** enabling smoother cooperation and higher circulation of students and graduates.

Core scenario logic

By 2030, EU and EU MS enter a phase of geopolitical stabilisation and renewed trust in the EU integration. International tensions ease, cooperation between EU MS becomes more predictable, and higher education institutions can again plan transnational activities with confidence. Qualification recognition processes, partnerships between higher education institutions and student circulation function with fewer disruptions. However, this stabilisation does not translate into a strong political mandate for redistributive or equity-driven reform in degree mobility. On the contrary, stability reduces the perceived urgency to address structural inequalities, while restored trust enables cooperation without consensus on cost-sharing. EU integration advances primarily in technically useful and politically low-cost areas, rather than in domains requiring long-term fiscal commitments or redistribution.

Therefore, this scenario reflects functional integration without social deepening. While EU and national actors remain formally committed to intra-EU mobility, including degree mobility, financial support for inclusive participation remains politically optional and structurally limited. High costs of living and limited public support are not actively contested, but rather normalised as part of a “good enough” equilibrium. As a result, **degree mobility becomes more stable and reciprocal but remains socially stratified.** Participation is concentrated among students with sufficient financial resources, and mobility is increasingly framed as a private investment rather than a collective educational right. This concentration triggers risks of political legitimacy of mobility, as it undermines its credibility as a tool of social convergence and shared European benefit.

3.3. Policy recommendations for the achievement of EU targets

In line with the approach outlined in the Inception Report, the foresight exercise assumes the achievement of mobility targets as the desired future outcome and focuses on identifying policy measures to support their attainment across the four scenarios. Ensuring the achievability of mobility targets under different scenario conditions was also a dedicated topic of discussion during the foresight workshop “*Validating scenarios and co-designing policy recommendations*”, which involved 24 participants.

The sections below present the main policy measures at EU level, distinguishing between measures relevant across all scenarios and those specific to individual scenarios, with the aim of enhancing the achievability of mobility targets.

Across all scenarios, a set of measures emerges as **prerequisites for achieving mobility targets**, particularly in relation to degree mobility:

- **Acknowledge degree mobility as a structurally distinct form of mobility** within EU mobility targets and policy frameworks. Degree mobility depends on qualification recognition and trust in recognition processes, affordability throughout the full mobility cycle (from enrolment to graduation), workability and risk reduction, and therefore requires dedicated EU policy instruments rather than a single funding solution. Several workshop participants also emphasised the need not only to define specific targets for degree mobility, but to ensure that these targets are sufficiently ambitious and binding.
- Establish a **shared definition of balanced degree mobility** and develop a **common measurement framework** to better assess the extent to which balanced mobility flows are being achieved.
- **Consolidate inclusion as a core design principle**, including a harmonised understanding of “people with fewer opportunities”, a clearer typology of barriers, and more precise inclusion targets, alongside greater standardisation in how support schemes identify and assist these groups.
- **Recognise and strengthen student employment and labour-market integration** as a key **enabler** of degree **mobility**. Workshop participants highlighted that, in long-term mobility, the ability to work during studies-shaped by regulatory frameworks, language proficiency, and flexible study arrangements-often determines feasibility, even where partial income substitution is available through targeted financial instruments.

Table 8: Policy recommendations aimed at the achievement of mobility targets under the various scenarios presented previously

Policy recommendation	Scenario 1: More inclusive, but territorially imbalanced mobility under geopolitical insecurity	Scenario 2: More inclusive mobility, but only partially balanced circulation in a cohesive Europe	Scenario 3: Restricted and territorially concentrated mobility under geopolitical fragmentation	Scenario 4: Stable and more reciprocal, but socially stratified mobility in a renewed EU
Develop EU-level mobility risk management protocols to ensure that mobile learners are not “trapped” in the event of crises, thereby reducing the perceived irreversibility of degree mobility, which constitutes a key barrier in contexts of geopolitical instability. Such protocols could include EU guidance on flexible recognition of qualifications and learning outcomes in crisis situations, provisions for transfer and teach-out arrangements between partner institutions, and emergency financial top-ups-funded through the Erasmus+ programme-for students with fewer opportunities. In parallel, Member States could be encouraged to mobilise ESF+ resources to support student services addressing the needs of displaced or transferring degree learners.	✓		✓	
Create trusted degree mobility corridors by supporting the development of small-scale bilateral or trilateral consortia that offer predictable and low-risk degree pathways. These pathways could include pre-agreed admission procedures, guaranteed recognition of qualifications, and transferability of learning outcomes, building on and strengthening European Universities alliances and the Erasmus+ programme (for example, through adjustments to supported priorities and evaluation criteria). To avoid overconcentration in a limited number of perceived “safe” destinations, such mobility corridors should be geographically distributed, including across smaller regions and cities. In contexts of instability, these small-scale partnerships foster meso-level trust, which can partially substitute for weakened system-wide trust.	✓		✓	
Incentivise degree mobility towards deficit destinations within existing programmes (notably Erasmus+) in order to redistribute mobility flows and reduce pressure on traditionally receiving hubs. Such incentives could include higher scholarships or fee waivers for degree programmes in deficit destinations, increased support for joint degrees involving less-attractive regions, and capacity-building measures for higher education institutions and public authorities in areas that currently struggle to attract mobile learners.		✓		
Create an EU talent circulation tool, comprising optional, EU-supported return and circulation instruments , to ensure that return support is available by default for publicly supported outgoing degree mobility. Such a tool could include return grants, “come-back” traineeships, and support for the development of employer partnerships and alumni matching platforms in sending regions.		✓		
Reframe learning mobility as a resilience- and skills-capacity instrument , explicitly positioning it as a competitiveness tool in strategic sectors and a mechanism for social and territorial cohesion. Within this framing, existing mobility instruments should prioritise funding for degree mobility in strategic fields and for degree mobile learners from disadvantaged backgrounds.			✓	

Policy recommendation	Scenario 1: More inclusive, but territorially imbalanced mobility under geopolitical insecurity	Scenario 2: More inclusive mobility, but only partially balanced circulation in a cohesive Europe	Scenario 3: Restricted and territorially concentrated mobility under geopolitical fragmentation	Scenario 4: Stable and more reciprocal, but socially stratified mobility in a renewed EU
Support the scaling-up of high-quality blended and virtual components of degree mobility, not as a substitute for physical mobility, but as a stabilising mechanism to sustain participation rates when geopolitical risks increase.	✓		✓	
Enhance the feasibility of combining study and work during degree mobility abroad by developing EU-level guidance and peer-learning mechanisms-including compatible study-work models, language-for-work modules, minimum standards for flexibility, and mapping of student employment constraints across Member States-building on existing platforms such as EURES. In parallel, prioritise funding for learners with fewer economic opportunities within Erasmus+ and Cohesion Policy programmes, thereby strengthening the link between funding allocation and inclusion performance.			✓	✓
Make inclusive mobility a binding design feature across EU mobility instruments to ensure that degree mobility is not only an elitist privilege.				✓
Reward inclusion performance of higher education institutions, for instance through preferential access to certain EU calls, mobility excellence labels linked to European Universities/joint degrees, and technical assistance.			✓	✓
Provide targeted support-including technical assistance, capacity-building measures, prioritisation in mobility calls, and support for the development of joint European degrees-to "second-tier" destinations, with the aim of strengthening institutional capacity, enhancing attractiveness, and encouraging mobility towards regions with lower living and study costs.				✓

4. Conclusions and recommendations

The study confirms that the concept of **balanced learning mobility would benefit from a more clear definition and it cannot be reduced to numerical symmetry of incoming and outgoing credit mobile or degree students**. Across EU and national policy documents, stakeholder interviews and foresight analysis, *balanced mobility* consistently emerges as a **contextual and impact-oriented policy objective**, concerned with how the **costs and benefits of degree mobility are distributed** across students, institutions, regions and Member States, rather than with flow parity per se.

At EU level, this implies a shift from treating imbalances as deviations from a target ratio towards **managing mobility as a system of interdependent education, labour-market and cohesion effects**. Degree mobility is central to this system. Unlike credit mobility-largely channelled through Erasmus+ and institutionally self-balancing-**intra-EU degree mobility generates long-term fiscal, demographic and labour-market effects** that accumulate asymmetrically across countries, within countries and European regions. These effects are most visible where **high net inflows coincide with public subsidisation and low graduate retention**, or where **persistent net outflows contribute to talent loss and demographic pressure**.

The foresight analysis reinforces this conclusion. Across all four scenarios, **imbalances in degree mobility persist unless explicitly addressed through coordinated European action**. Inclusive access alone improves participation but does not automatically generate balanced flows; conversely, geopolitical stability without redistribution stabilises mobility while entrenching stratification. Balanced mobility therefore requires **EU-level instruments that go beyond access and address circulation, risk, capacity and cost-sharing**.

Key areas for EU-level intervention

Based on the evidence and scenario analysis, five mutually reinforcing areas of EU action emerge as necessary to support more balanced degree mobility by 2030.

1. Establish a shared operational framework for balanced degree mobility

A first prerequisite is to **clarify and operationalise the concept of balanced degree mobility at EU level**, without imposing uniform numerical targets. The study shows that the absence of a shared definition limits comparability, weakens policy coordination and fuels misaligned national responses.

At EU level, this could involve:

- agreeing on a **common analytical framework** that assesses balance in terms of **net impacts** (fiscal, labour-market, demographic and institutional), rather than flows alone
- developing a **core set of measurement tools** combining mobility flows, graduate retention, and capacity effects, building on existing Eurostat, Erasmus+ and graduate tracking data - with each Member State retaining full discretion to interpret what these figures mean in light of their own structural context and policy

priorities embedding balanced degree mobility as a **monitoring dimension within existing EU mobility targets**

- **strengthening the granularity of mobility data** below country level, including institution-level differences in credit- and degree-mobility demand (e.g. between highly sought-after institutions in fields such as STEM or medicine and less sought-after or provincial institutions) and field-of-study-level differences.

Such a framework would provide a shared reference point while preserving Member States' ability to interpret balance in light of their structural context.

2. Support circulation and return as core components of balanced mobility

Across scenarios, **balanced mobility depends less on stopping mobility than on enabling circulation**. Where intra-EU degree mobility is followed by permanent one-directional retention, imbalances deepen; where return, re-migration or circular pathways are supported, net impacts become more evenly distributed.

EU-level action is particularly relevant here, as national instruments alone struggle to influence cross-border outcomes. Priority measures include:

- developing an **EU talent circulation toolbox**, making return support *default-available* for publicly funded degree mobility. This would entail moving from ad hoc, fragmented return measures to a coordinated EU-level framework embedded directly into mobility funding schemes (e.g. Erasmus+, national grants with EU co-funding). In practice, this could mean that students benefiting from publicly funded degree mobility are automatically offered structured return pathways, rather than return being left to individual choice or national labour market conditions. Such a toolbox could combine several instruments: (i) return incentives (e.g. time-limited grants, tax benefits or student loan rebates conditional on return or circular mobility), (ii) pre-arranged “return trajectories” linking students with employers, research institutions or public sector bodies in their home country before departure, and (iii) EU-wide digital tracking and matching tools connecting mobile graduates with opportunities across Member States, including their country of origin. Importantly, the approach would not restrict mobility but would aim to “design in” circulation by default-ensuring that outward mobility is systematically connected to reintegration or onward mobility options.
- supporting **return grants, “come-back” traineeships and cross-border employer partnerships** in sending regions
- strengthening **recognition of skills and experience gained abroad**, including through European digital credentials and coordinated recognition practices.

The foresight analysis suggests that such measures are critical under both stable and unstable geopolitical conditions, as they reduce the risk that improved access accelerates selective outflows. In other words, if mobility opportunities expand without equivalent investment in return, reintegration and circulation pathways, students from smaller, less affluent, or lower-wage systems may become more likely to leave and less likely to bring the benefits of mobility back. The result is not simply “more mobility”, but potentially a more selective and unequal distribution of skills, talent and long-term benefits across the EU.

3. Actively steer mobility destinations through incentives and capacity building

The study finds that **student choice alone does not generate balanced mobility**, even when financial and informational barriers are reduced. Language, reputation, labour-market prospects and perceived safety systematically steer demand towards a limited set of destinations.

EU programmes can therefore play a stronger **steering role**, including by:

- **incentivising mobility towards deficit or under-selected destinations** through higher grants, fee waivers or targeted calls
- supporting **joint degrees, European Universities alliances and small consortia** involving less-attractive regions, creating trusted and more mobility pathways
- investing in **capacity building for institutions and public authorities** in regions with lower costs but limited international visibility.

Scenario analysis indicates that without such steering, improved access leads to concentration rather than diversification.

4. Embed inclusion as a guiding principle while acknowledging its interaction with balanced mobility outcomes

Inclusive mobility and balanced mobility are closely interrelated, but not identical objectives. Expanding access to mobility without addressing destination concentration, circulation patterns or post-graduation outcomes can unintentionally intensify imbalances, while restrictive approaches aimed at correcting imbalances risk undermining inclusiveness.

At the same time, the scope for EU-level intervention in degree mobility remains structurally limited, as core decisions on student support, eligibility criteria and funding allocation lie primarily with Member States. Moreover, the absence of a robust and harmonised data base on potential demand for degree mobility and on the characteristics of mobile learners constrains evidence-based policy design at EU level.

Within these limits, EU-level action can primarily play a **facilitating and enabling role**, by:

- **promoting inclusion as a shared design orientation** across EU mobility frameworks and cooperation initiatives, while supporting voluntary convergence of definitions, data collection approaches and monitoring practices
- **encouraging greater consideration of balanced mobility outcomes** in the design and evaluation of EU-supported initiatives (e.g. joint programmes, alliances, Erasmus Mundus), without imposing binding targets or quotas
- **supporting the development and scaling of blended and hybrid formats** as complementary and stabilising options, particularly in periods of heightened geopolitical uncertainty, while reaffirming that these formats are not substitutes for physical mobility.

5. Interpreting the EU mobility target as a system-level objective

Evidence across Member States, combined with foresight analysis, shows that participation in learning mobility is shaped by **structural, financial, linguistic,**

informational and institutional factors, which differ markedly between degree and credit mobility and across national contexts.

Accordingly, the mobility target should be understood as a **system-level objective**, requiring differentiated policy responses by mobility type, learner profile and destination context. Achieving the target therefore depends less on a single intervention than on the **alignment of EU-level instruments, national frameworks and institutional practices**, with a particular focus on **degree mobility, credit mobility participation gaps, and inclusiveness**.

6. Achieving the target through degree mobility: expanding access while managing concentration

The study shows that **degree mobility is the most structurally constrained component of the mobility target**, due to its long duration, higher costs, and stronger interaction with labour markets and housing systems. Evidence from country analysis highlights several factors consistently associated with higher intra-EU degree mobility:

- the **availability of programmes fully taught in English or other widely spoken languages**, even where tuition fees are higher
- access to **highly competitive or capacity-constrained programmes** in the country of origin
- the **availability and affordability of student housing**, which frequently represents the largest cost component of degree mobility.

At the same time, the foresight analysis demonstrates that **unmanaged expansion of degree mobility risks reinforcing geographic concentration**, with mobility flows clustering in a limited number of “safe”, high-reputation or destinations offering English-language programmes.

To increase degree mobility, EU-level action should therefore focus on **expanding capacity while steering distribution**, rather than on volume growth alone. Key measures include:

- **Supporting the strategic expansion of joint-degree programmes taught in international languages**, particularly in Member States and regions with lower inbound mobility, while preserving equal treatment between national and EU students.
- **Scaling up investment in student accommodation**, including through EU cohesion instruments, as housing affordability emerges as a decisive bottleneck for degree mobility participation.
- **Embedding degree mobility more explicitly within EU mobility targets**, with differentiated monitoring that recognises its distinct cost structure, risk profile and long-term impacts.

Without such targeted measures, the foresight scenarios suggest that degree mobility will either remain socially selective or become increasingly concentrated, limiting its contribution to the overall mobility target.

7. Achieving the target in credit mobility: closing the participation gap

By contrast, the study finds that **credit mobility offers the greatest immediate margin for progress towards the mobility target**. Large differences persist between Member States in outbound participation rates, and surveys consistently reveal a substantial gap between students who express interest in credit mobility and those who participate.

Evidence across countries points to a limited set of **recurrent and addressable barriers**, suggesting that targeted policy action could yield significant gains:

- **Financial support** remains the primary constraint. Increasing grant amounts—particularly where cost-of-living differentials are high—and ensuring **timely disbursement** are critical to avoid liquidity barriers linked to upfront expenses. The portability of national grants and loans, under equal conditions, has proven particularly effective in supporting participation.
- **Language skills** represent a second major barrier. Long-term investment in foreign language learning—starting in compulsory education and extending through higher education—broadens the range of feasible destinations and disciplines, especially beyond English-only mobility.
- **Information and administrative complexity** continue to deter participation. Despite the maturity of Erasmus+, students report significant variation between institutions in guidance, transparency and procedural clarity.
- **Curriculum design and recognition practices** strongly influence feasibility. Concentrating mobility-friendly course units in specific semesters, embedding mobility windows in programme design, and strengthening automatic credit recognition can significantly lower participation thresholds.

To increase credit mobility, EU-level measures should therefore prioritise:

- **strengthening Erasmus+ grants and payment predictability**, especially for people with fewer opportunities
- **reinforcing language-learning support**, including mobility-linked language preparation
- **standardising information provision and administrative processes** across institutions
- **promoting mobility-friendly curriculum design**, including through joint programmes and European Universities alliances.

8. Ensuring inclusiveness and sustainability of target achievement

Across both degree and credit mobility, the study underscores that **achieving the mobility target without addressing inclusiveness and balance risks undermining its legitimacy and sustainability**. Foresight scenarios show that participation can expand in headline terms while remaining socially stratified or geographically concentrated.

To align target achievement with the Council Recommendation's broader objectives, EU-level action could therefore:

- **embed inclusion as a design principle** across mobility instruments, with clearer definitions, monitoring and incentives
- **link progress towards the mobility target to destination diversity and circulation outcomes**, not only participation rates
- **use blended and virtual components strategically** to stabilise participation in periods of geopolitical or economic disruption, without replacing physical mobility.

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Annex 2. Additional findings

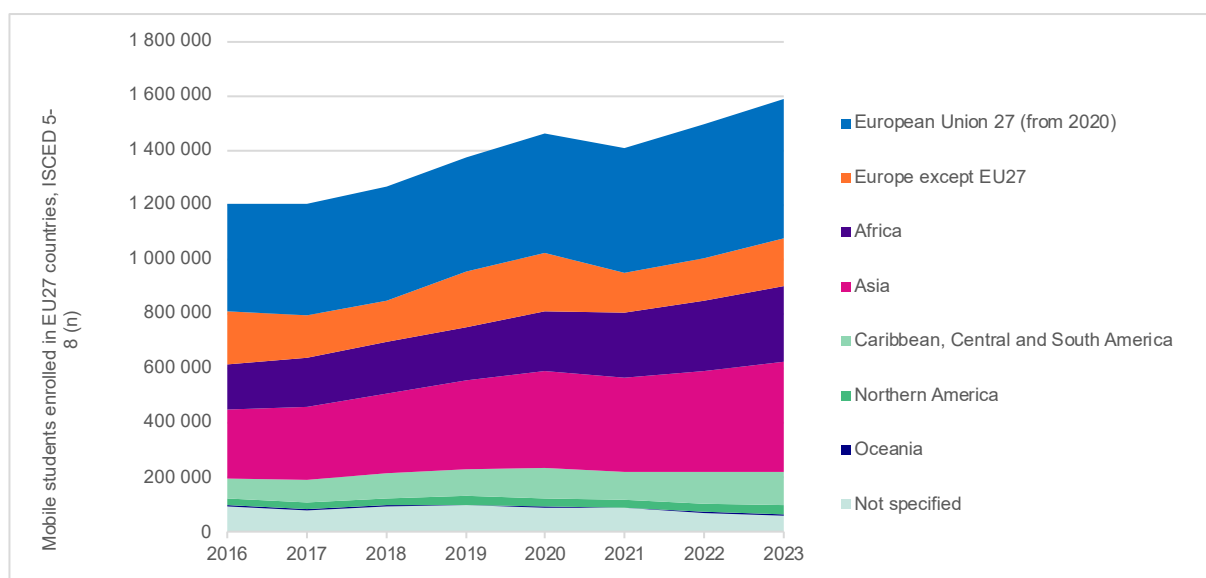
4.1. Degree mobility

4.1.1. Recent trends and patterns in degree mobility – supplementary evidence

Overall growth trends in degree mobility (2016–2023)

A more detailed analysis of students' countries of origin is provided in Figure 3, showing how Asia stands out as both the region of origin providing the largest number of incoming degree mobile students in 2023 (besides the European continent) and with the largest increase since 2016. For context, students from Asia are also the largest group (58% of the total) of foreign or international students in tertiary education across OECD countries.²⁷⁴ Africa and the Caribbean, Central and South America regions also saw considerable increases, with around 65% each. The only regional category that experienced a decline over this period was non-EU European countries, a trend that is largely attributable to Brexit. This decline reflects a combination of factors, including the reclassification of UK students as non-EU nationals, the introduction of higher tuition fees and less favourable funding conditions for EU students in the UK, and increased administrative and residency barriers, which together reduced student mobility flows between the EU and the United Kingdom.

Figure 15: Number of degree mobile students from abroad enrolled in EU27 countries, ISCED 5-8, by region of origin (2016–2023).



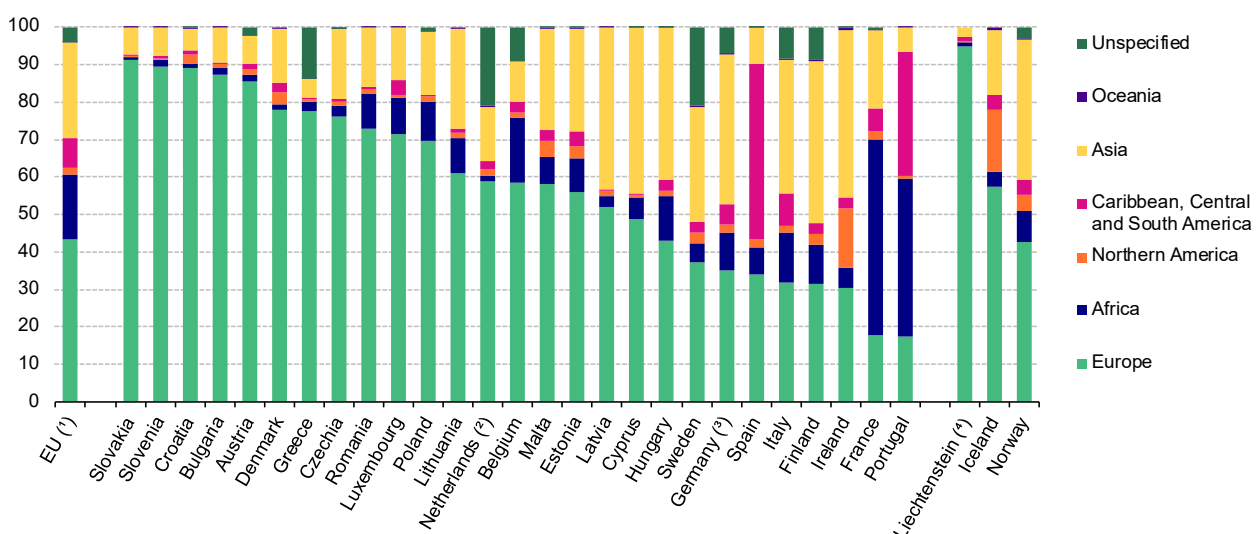
²⁷⁴ OECD (2025), *Education at a Glance 2025: OECD Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/1c0d9c79-en>.

Source: Prepared by study team, Eurostat data ([educ uoe mobs02](#), 2025).

Comparing the same indicator per EU/EEA countries²⁷⁵ of destination, as shown in the following figure, notable differences can be observed. **In a majority of EU/EEA countries, European²⁷⁶ students represent a clear majority of incoming degree-mobile students, with Asian students being the second largest group.** In a second group of countries (Latvia, Cyprus, Hungary, Sweden, Germany, Italy), the share of European and Asian students was more balanced. In both groups, the combined share of European plus Asian students amounted to 85 to 98% of the total students from abroad, except for Belgium, where 17% of students came from Africa, mainly French-speaking countries. In only two countries (Finland, Ireland) Asians represented a clear majority of incoming mobile students.

The other outliers were those whose main language of instruction is widely spoken in some countries outside Europe. These include Spain, with Latin American countries being the main region of origin, Portugal, with most students coming from Portuguese-speaking African countries and Brazil, and France, with French-speaking African countries being the largest region of origin. The only countries with a significant share of North American students were Ireland (16%) and Iceland (17%). No country reached 1% of students from Oceania.

Figure 16: Share of degree mobile students from abroad in EU/EEA countries, ISCED 5-8, by country of enrolment and by region of origin (2023).



Source: Prepared by study team, Eurostat data ([educ uoe mobs02](#)).

Notes: (1) All countries include data on ISCED 5-8, except the Netherlands, which only included 6-7. (2) Only ISCED 6-7. (3) Estimates. (4) 2022.

Net overall inbound and outbound degree mobility (all regions)

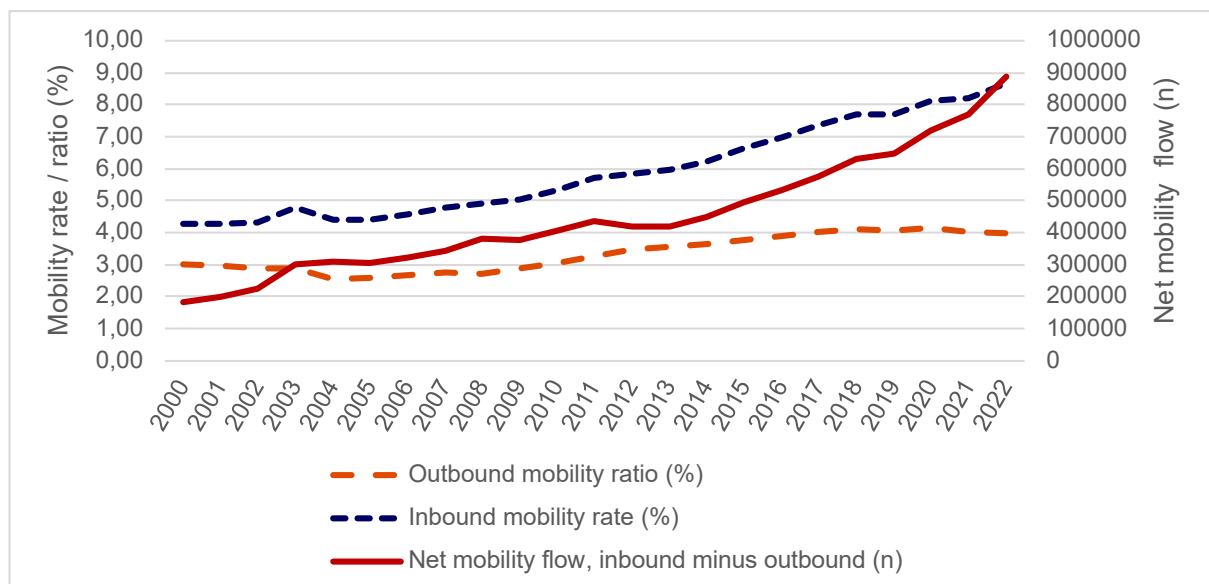
Eurostat provides ample data and disaggregation options for incoming (inbound) degree mobile students, as this is systematically collected by each country of destination. However, data on outgoing (outbound) students is not collected by the country of origin. Therefore, the only source that provides data on EU students going

²⁷⁵ The scope of the study includes EU27 Members States and EEA countries (Norway and Iceland).

²⁷⁶ This category includes both the EU and non-EU European students as per Eurostat classification.

to study outside of the EU is the UNESCO Institute for Statistics. The following figure provides UIS estimates on the share that inbound students in the EU and outbound EU students in third countries represent from the total tertiary enrolment in the EU. The figure shows a trend over the past two decades: the EU receives more (inbound) students than it sends (outbound) abroad, and the difference between the two numbers (net mobility flow) is increasing. While both inbound and outbound mobility have increased in this time, inbound mobility has increased faster, and more consistently. While outbound mobility numbers increased every year between 2004 and 2021, the parallel increase in the overall tertiary enrolment made the outbound mobility ratio stagnate since 2017. No clear shift in either inbound or outbound mobility patterns appears to have resulted from the COVID-19 pandemic.

Figure 17: Net inbound degree mobility flow (n), inbound mobility rate (%) and outbound mobility ratio (%), tertiary education, European Union (2000-2022)²⁷⁷ (accounting for all regions, students from both EU and non-EU countries studying in the EU and EU students going for studies in both EU and non-EU countries).

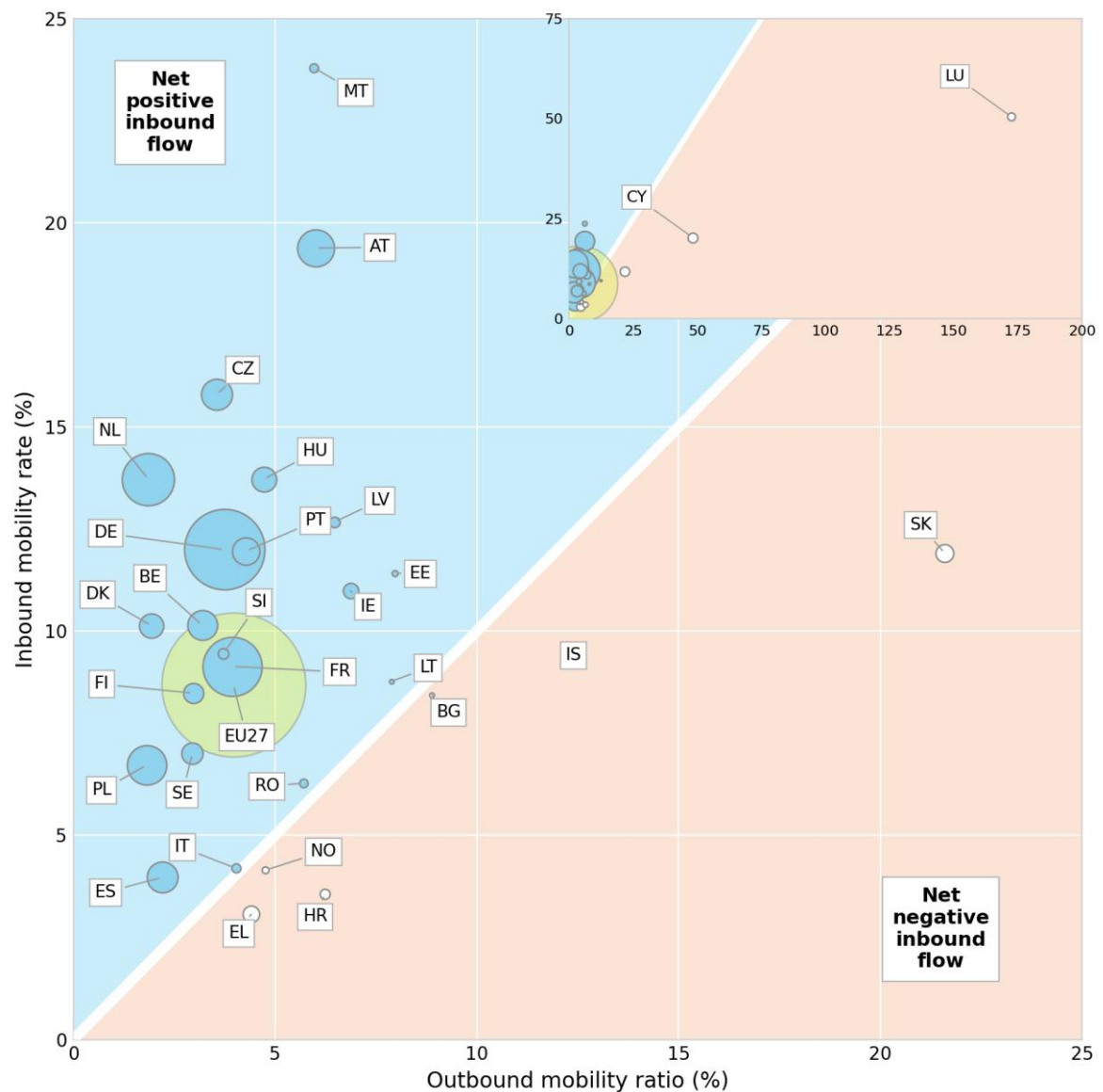


Source: Prepared by study team, UIS data ([MOR.5T8.40510](#) & [MSEP.5T8](#), 2025).

Beyond the EU aggregate trend, noticeable differences exist between countries in terms of the balance between incoming and outgoing degree student flows. Figure 5 illustrates how the different inbound, outbound and net flows combine for each country.

²⁷⁷ The differentiated use of the words 'rate' and 'ratio' here is intentional. The inbound mobility rate is the share of students from abroad within the total enrolment in the country of destination (all EU countries in this case). The outbound mobility ratio is the proportion between the students from one country (or region) that have gone abroad to study and the total enrolment in that country for the same education level.

Figure 18: Net inbound degree mobility flow (area), inbound mobility rate (%), outbound mobility ratio (%), tertiary education, by country (2022*) (accounting for all regions, students from non-EU countries studying in the EU and EU students going for studies in non-EU countries).



Source: Prepared by study team, UIS data ([MENF.5T8](#), [MENFR.5T8](#), [MOR.5T8.40510](#) & [MSEP.5T8](#), 2025).

Note: Filled circles represent positive net flows and empty ones, negative flows. Luxembourg and Cyprus are presented in separate table on the top-right corner due to values beyond the selected limits for the main chart. Data for the Netherlands is from 2021 (2022 unavailable).

Intra-EU degree mobility net flow

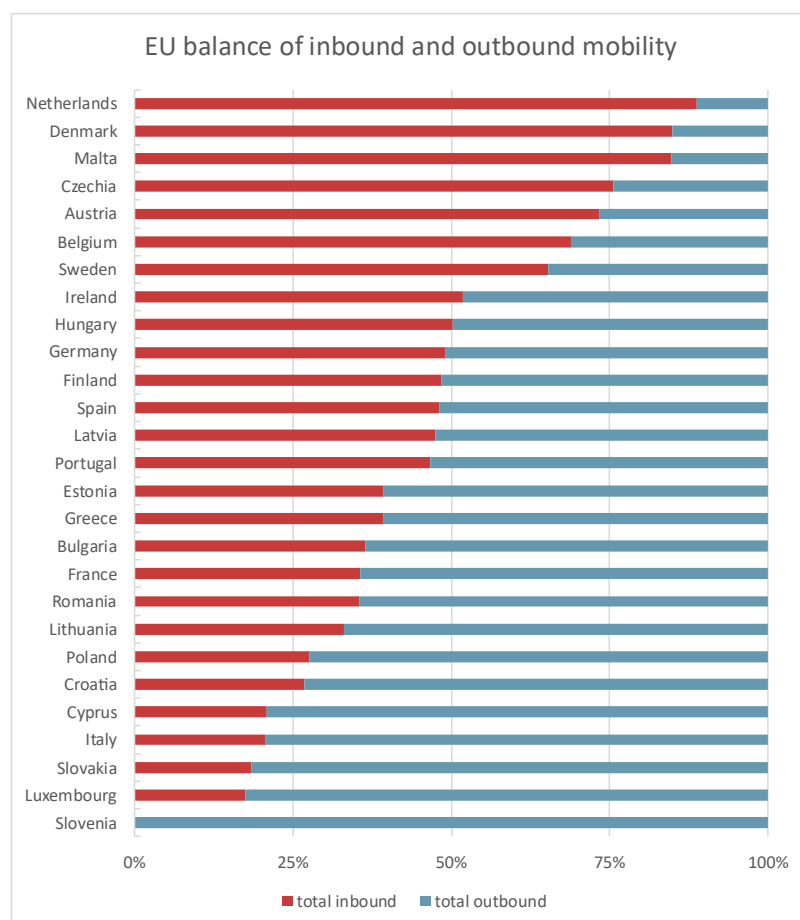
In terms of net flows of students (inbound minus outbound) per country, Eurostat does not directly provide data on outbound mobility, however, allows calculating intra-EU outbound mobility using inward mobility data. Figure below provides an overview of these flows for each EU country. For example, in 2023 there were about 8 students coming to study a degree in the Netherlands from other European countries for each

Dutch student going to study a tertiary degree abroad. Among those with high ratios of inbound students per outbound student we can find Denmark and the Czech Republic (both with a ratio of 5.6 to one), Malta and Austria (with ratios of about three to one), Belgium and Sweden (with ratios of about two to one). Ireland, Hungary, Germany, Finland, Spain, Latvia and Portugal all have approximately equal numbers in each direction of the flow, with the rest of the countries having more outbound students than inbound.

Though no clear geographical clustering can be immediately appreciated from these numbers, a multifactorial analysis of common push and pull factors is provided in the section 2.1.7. These include pull factors such as free or heavily subsidised tuition (e.g. Austria, Cyprus, Czechia, Denmark or Belgium), push factors such as lower average salaries or higher unemployment rates in the country of origin (such as in many countries in Southern and Eastern Europe), and the availability of programmes in specific languages that are widely spoken in other countries (e.g. Austria (DE), Belgium (FR), Ireland (EN)).

An alternative visualization to the inbound and outbound degree mobility flows for each EU country shown in figure 7 is presented below.

Figure 19: Inbound and outbound mobile students (from EU countries to EU countries), ISCED 6-8, as share of all mobile students having the country as destination or origin (2023).

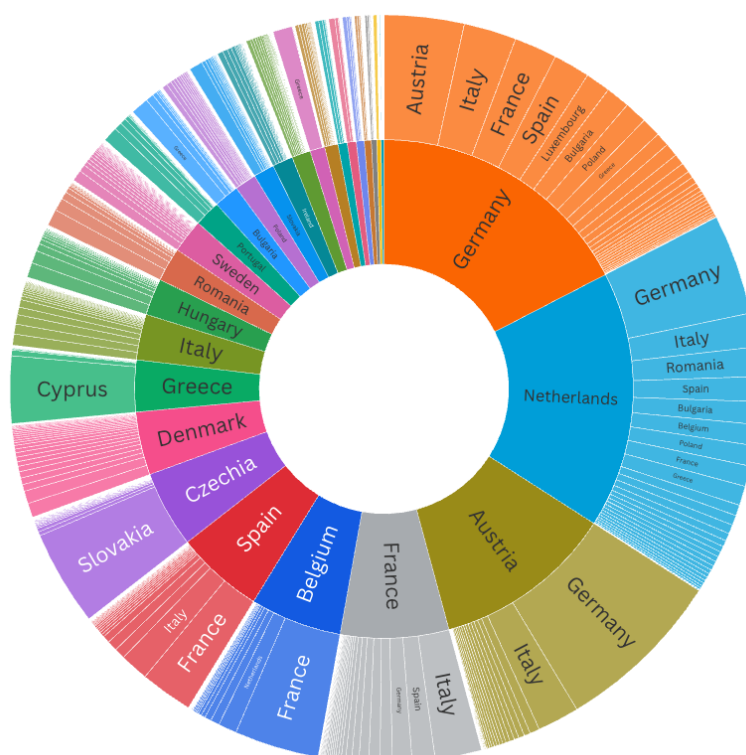


Source: Prepared by study team, Eurostat data ([educ_uoe_mobs02](#), 2025).

Note: Inbound students' data was unavailable for Slovenia. For better comparability, ISCED 5 was not included in the calculation, as in several EU countries it does not exist, or the data is not available

The following two figures provide a visualization of bilateral degree mobility flows from and to EU/EEA countries. While figure 9 from section 2.1.4 provides a visualization of bilateral flows (combining the number of students going from country A to country B with the ones going from country B to country A), the following figures allow for a better understanding of the direction of these flows, and the relative weight of different countries of origin in each country of destination. Figure 8 provides a clear ranking of the main countries of destination (inner circle) and of the countries of origin of the students going to each of them (outer circle). From this figure it can be noted how some countries' inbound mobility is more heavily dependent of a few countries of origin (e.g. French²⁷⁸ students in Belgium, Germans in Austria, Slovaks in Czechia, Cypriots in Greece), while others have a more diversified profile of incoming students (e.g. Germany, Netherlands, France).

Figure 20: Bilateral flows of degree mobile students (from EU/EEA countries to EU/EEA countries), ISCED 5-8 (2023), by country of destination (inner circle) and country of origin (outer circle).



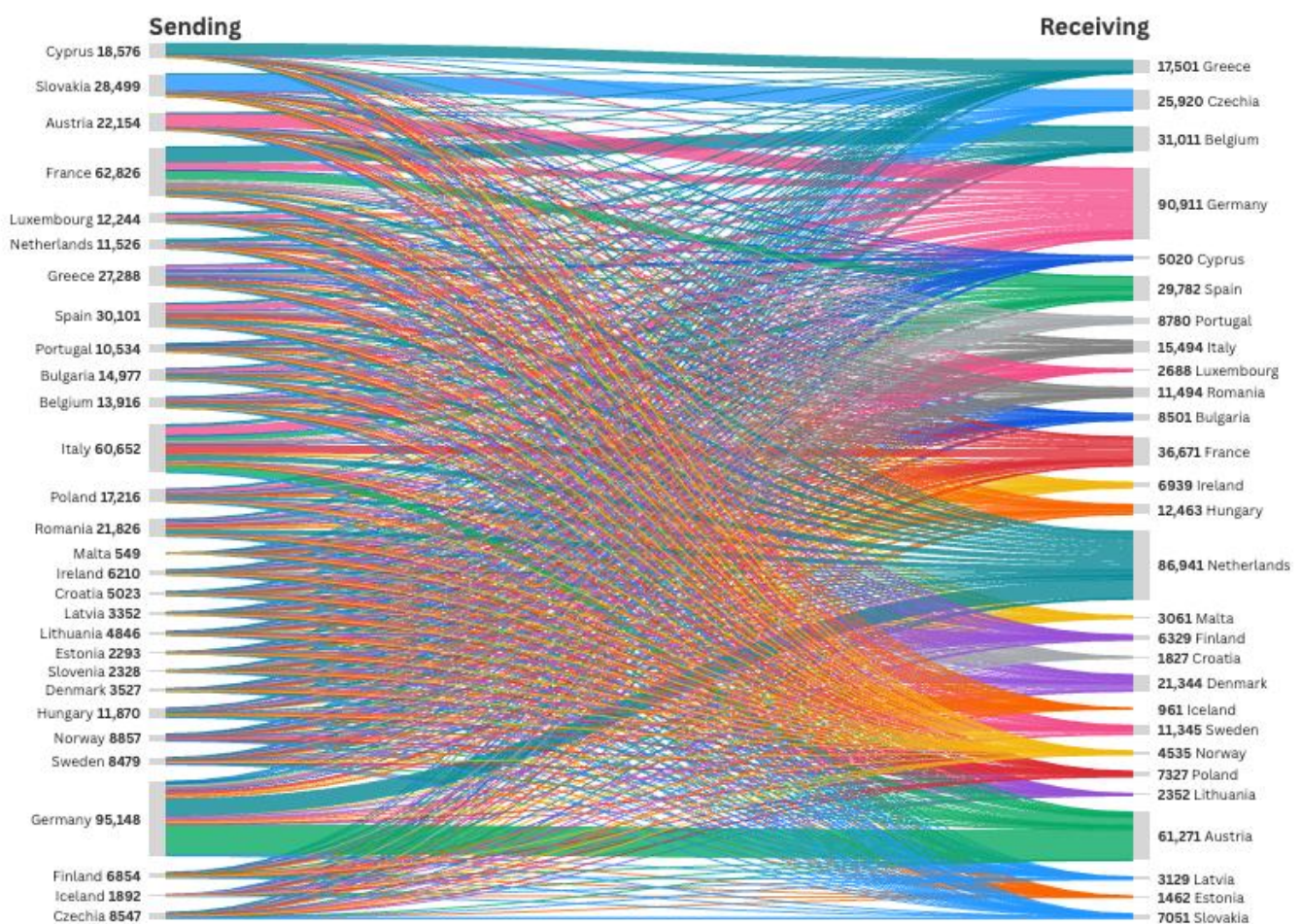
Source: Eurostat, [educ_uoe_mobs02](#) (2023). Figure by study team.

Note: The number of degree mobile students for any combination of two countries, as well as the country names missing from this figure due to space limitations, can be consulted via an interactive online version of the figure [\[click here\]](#).

²⁷⁸ As a simplification, the word “French” is used for students coming from the French education system, even for those without French citizenship (see Glossary of terms for more details on Eurostat’s methodology).

Complementary to the previous figure, Figure 9 below provides the details of these bilateral degree mobility flows, visualized both by countries of origin and countries of destination. In the same way that there is a group of countries whose inbound students come primarily from a single country of origin (as mentioned before), this figure shows how some countries' outbound degree mobile students primarily choose a single country of destination (e.g. most Austrians going to Germany –and close to half of all outbound Germans go to Austria, most Cypriots go to Greece, and most Slovaks go to Czechia).

Figure 21: Bilateral flows of degree mobile students (from EU/EEA countries to EU/EEA countries), ISCED 5-8 (2023), by country of origin (left) and country of destination (right).



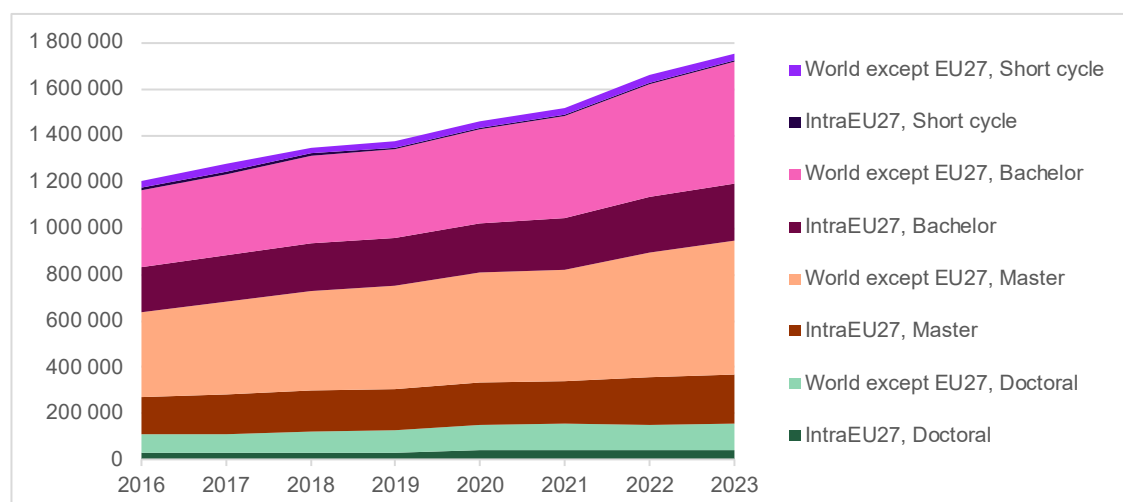
Source: Eurostat, [educ_uoe_mobs02](#) (2023). Figure by study team.

Note: An enlarged version of this figure, as well as the exact number of degree mobile students for any combination of two countries, can be consulted via an interactive online version of the figure [[click here](#)].

Degree mobility by education level and country

Looking at the distribution of international students by education level, a clear trend can be observed: **the higher the level, the higher the share of degree mobile students from abroad, going from 2.7% at short-cycle tertiary programmes (ISCED 5) to 6.9% for bachelor's (ISCED 6), 14.3% for master's and 23.3% for doctoral level.** Figure below shows the evolution over time of international students by education level, and by region of origin (EU countries and non-EU countries). Consistent with the overall trend shown in Figure 2, non-EU students also represent a majority of international students at each tertiary education levels. The figure also shows the very limited extent of inbound degree mobility at ISCED 5 level (short-cycle tertiary degrees), which even declined for intra-EU students. In contrast, EU students at doctoral level, and non-EU students at bachelor and master's level each saw a 55% growth or more during the period (2016-2023).

Figure 22: Number of degree mobile students from abroad enrolled in EU27 countries, by region of origin and education level (2016-2023)²⁷⁹.



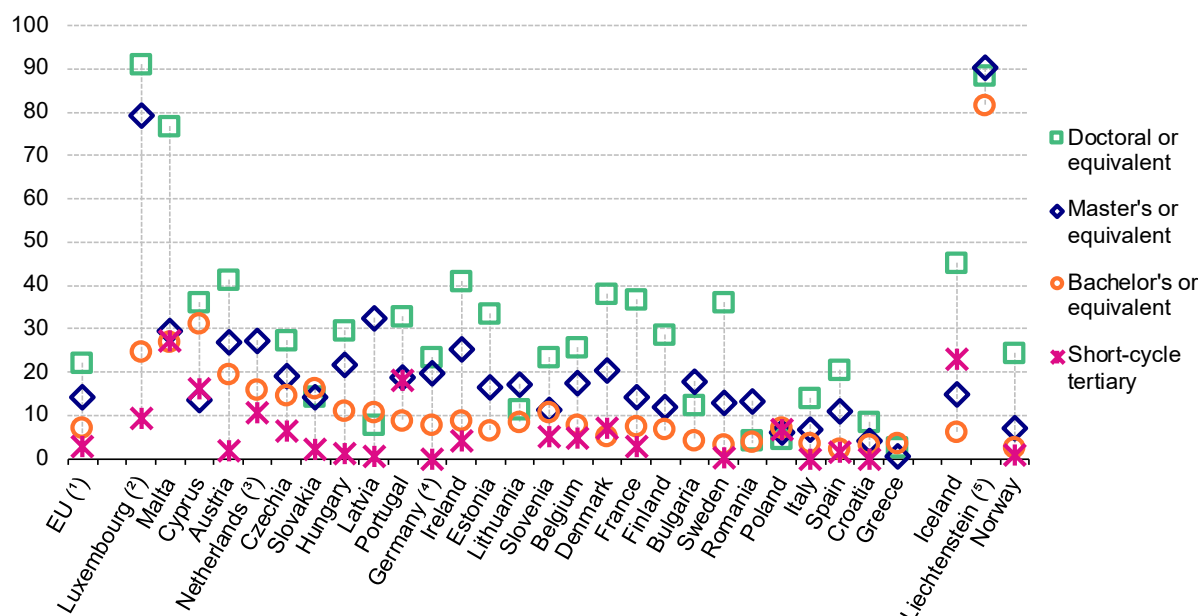
Source: Prepared by study team, Eurostat data ([educ_uoe_mobs02](#), 2025).

A closer look per country at the distribution of international students by education level shows significant differences. The **cross-European trend of higher education levels having higher shares of international students is generally applicable to most countries.** The only countries with more than 10% of mobile students from abroad at short-cycle level were Malta, Iceland, Portugal²⁸⁰, Cyprus and the Netherlands. The only countries that had a lower share of mobile students at PhD level than at lower levels included Latvia, Romania, Poland and Greece.

²⁷⁹ The total number of international students from non-EU countries differs slightly from the previous figure. Though the source for both is the same indicator in Eurostat, for some EU countries of destination there is only data for some tertiary ISCED levels; therefore, they are accounted for when disaggregating data by ISCED level, but not when choosing the Eurostat aggregate for ISCED levels 5 to 8 (in which the country appears as missing data).

²⁸⁰ Portugal, notably, a long-standing approach of providing equal recognition to professional-oriented and academic-oriented programmes, provided in separated higher education institutions.

Figure 23: Share of degree mobile students from abroad (worldwide, including students from non-EU countries studying in the EU and EU students going for studies in non-EU countries) within each education level, per country of enrolment (2023).



Source: Prepared by study team, Eurostat data ([educ_uoe_mobs02](#), 2025).

Notes: Short cycle tertiary: not applicable in Bulgaria, Estonia, Greece, Lithuania, Romania, Finland, Liechtenstein, North Macedonia and Serbia. Ranked on the average for all tertiary education.

⁽¹⁾ Based on data available for EU countries.

⁽²⁾ Bachelor's or equivalent, master's or equivalent and doctoral or equivalent level: enrolments in independent private institutions are negligible and reported as 0.

⁽³⁾ Doctoral or equivalent: not available.

⁽⁴⁾ Doctoral or equivalent: estimates.

⁽⁵⁾ 2022.

⁽⁶⁾ Short-cycle tertiary: negligible students from abroad, reported as 0. bachelor's or equivalent and master's or equivalent: students from abroad only covers students in universities or universities of applied sciences.

Source: Eurostat (online data codes: [educ_uoe_mobs02](#) and [educ_uoe_enrt01](#))

Gender distribution of degree mobile students

Eurostat data provides disaggregation by sex²⁸¹ in many of these indicators. The latest available data (2023)²⁸² show gender balance (50.4% female) among mobile students from abroad, even more balanced than the overall tertiary student population (54.8% female)²⁸³. This distribution was broadly maintained since 2016 (when females represented 51.4% of mobile students and 53.8% of overall enrolment). The proportion is noticeably different by regions of origin, as 56% of European students are female, like the share in North American and Central and South American students (57% and 54% female respectively), compared to 44% of those coming from Africa and 43% of those coming from Asia.

²⁸¹ Eurostat indicators are collected by sex (female, male) and not by gender (women, men). Therefore, this report uses the balance between female and male students as proxy for gender balance. Eurostat does not account for other non-binary options.

²⁸² Distribution of mobile students from abroad enrolled at education level by sex (Eurostat, [educ_uoe_mobs04](#), 2025).

²⁸³ Distribution of students enrolled at tertiary education levels by sex (Eurostat, [educ_uoe_enrt04](#), 2025).

4.1.2. The concept and policy framing of balanced degree mobility

This annex presents further country examples that illustrate in greater detail the concept and framing of balanced degree mobility across member states.

Balanced degree mobility in the EU policy context (historical background)

In the context of EU policy and degree mobility²⁸⁴, the concept of ‘balanced mobility’ was established as a policy goal in the **2007 London Ministerial Communiqué**²⁸⁵ by the signatory countries of the Bologna Declaration. This communiqué urged countries to promote the development of balanced and ‘equitable’ mobility flows for staff and students within the European Higher Education Area (EHEA), suggesting that ‘balanced mobility’ implies parity of student flows. This aim was further reinforced and more explicitly articulated in **Leuven and Louvain-la-Neuve Communiqué in 2009**, specifying that such balance should be targeted in terms of the flows of incoming and outgoing students between EHEA countries^{286 287}.

A key document defining the goal of balanced mobility affecting all EU Member States (as well as the rest of the European Higher Education Area countries) is the “Mobility for Better Learning” strategy (**EHEA Mobility Strategy 2020**) adopted in 2012. This strategy made balanced mobility an explicit objective and focused particularly on degree mobility (full-programme mobility) because of its long-term impacts on sending and receiving countries. The strategy recognised that degree mobility can lead to “brain gain on the one side and brain drain on the other”, so ministers demanded more balanced flows especially for students pursuing full degrees abroad. The strategy even suggested a quantitative benchmark for balance: it proposed limiting the gap between inbound and outbound students so that the smaller flow is at least 75% of the larger (i.e. 75 incoming international students²⁸⁸ for 100 national students studying abroad, or vice versa)²⁸⁹. While this specific threshold was aspirational, it underscored the policy’s intent – each country should aim for near-parity in the number of students it sends abroad and hosts from abroad.

Balanced mobility in this strategy had **both an intra-European and an international dimension**, though the main focus of policy discussions for some EU Member States has been the intra-EU student flows. The 2012 EHEA Mobility

²⁸⁴ See Glossary Glossary of terms at the beginning of this report for a distinction of degree mobility and other key concepts.

²⁸⁵ *London Communiqué. Towards the European higher education area: Responding to challenges in a globalised world*, published on 18 May 2007
https://ehea.info/Upload/document/ministerial_declarations/2007_London_Communique_English_588697.pdf

²⁸⁶ https://ehea.info/media.ehea.info/file/2009_Leuven_Louvain-la-Neuve/06/1/Leuven_Louvain-la-Neuve_Communique_April_2009_595061.pdf

²⁸⁷ Ferencz, I. (2015). Balanced Mobility Across the Board-A Sensible Objective?. In: Curaj, A., Matei, L., Pricopie, R., Salmi, J., Scott, P. (Eds). *The European Higher Education Area*. Springer. https://doi.org/10.1007/978-3-319-20877-0_3

²⁸⁸ The term “international students” is used here as it appears in the original EHEA Mobility Strategy 2020 (2012), which does not further specify whether this refers to degree-mobile students (as defined in the Glossary, based on Eurostat terminology, i.e. students enrolled in a programme in a country different from that in which they gained their upper secondary qualification, with the intention of graduating there) or to foreign students (defined on the basis of citizenship, regardless of country of prior education).

²⁸⁹ https://ehea.info/media.ehea.info/file/Mobility/35/6/24082011_Working_paper_on_Mobility_strategy_2020_for_EHEA_606356.pdf

Strategy called for “more and better-balanced mobility” between EHEA countries²⁹⁰.

Conceptualisation of balanced degree mobility in national policies (individual country examples)

In **France**, there is no official definition of balanced mobility, but both incoming and outgoing student flows are promoted as part of a broader strategy. **Mobility is viewed as a strategic investment**, backed by dedicated funding and talent-attraction policies.²⁹¹ Recent shifts in global mobility-such as uncertainty in traditional host countries such as the United States, have further encouraged France to position itself as an attractive alternative destination.²⁹²

In **Luxembourg**, the small size of the system and limited domestic offer shape a pragmatic approach towards balanced mobility. The University of Luxembourg, with about 7,000 students, cannot absorb the full domestic demand. As a result, outward degree mobility is a structural feature of the system, and achieving balanced mobility in the conventional sense of numeric balance between incoming and outgoing students is not considered feasible.²⁹³

Ireland does not have a single stand-alone balanced mobility policy, but the Higher Education Authority, acting as the National Agency for Erasmus+ in higher education, has embedded the principle of balance within its implementation of the programme. The Global Citizens 2030 strategy encourages both reciprocity in partnerships and strong support for outgoing mobility, with the goal of maintaining Irish higher education institutions (HEIs) internationally connected. With regards to degree mobility, Ireland actively seeks to increase the number of incoming students, regardless of outgoing numbers. The Global Citizens 2030 strategy explicitly identifies the international education sector ‘as an economic sector in its own right, (...) as sectors such as tourism, culture and others’. The Strategy aims at ensuring the quality of the living and learning experience as a way to attract international learners and researchers.

4.1.3. Available data sources and data gaps – supplementary findings

Eurostat

Notable data gaps in Eurostat indicators include no data on mobile students in Slovenia by country of origin, and no recent data for the Netherlands at ISCED 8 level (i.e. PhD students). In some countries, disaggregation by country of origin was incomplete, with a significant share of inbound students marked as “country of origin: not specified” in the Netherlands, Germany, Italy, Sweden, Belgium, Greece, Finland, and, to a lesser extent, France and Austria, which can bias the analysis of inbound students by country or region of origin.

²⁹⁰ Mobility strategy 2020 for the European Higher Education Area (EHEA). https://ehea.info/media.ehea.info/file/2012_Bucharest/39/2/2012_EHEA_Mobility_Strategy_606392.pdf

²⁹¹ Online interview. Official, European Higher Education Area Unit, Delegation for European and International Affairs (DAEI), French Ministry of Higher Education, Research and Innovation, June 12, 2025

²⁹² Le Monde. (2025). Emmanuel Macron annonce un nouvel investissement de 100 millions d'euros pour séduire les chercheurs étrangers. https://www.lemonde.fr/sciences/article/2025/05/05/emmanuel-macron-annonce-un-nouvel-investissement-de-100-millions-d-euros-pour-seduire-les-chercheurs-etrangers_6603132_1650685.html

²⁹³ Written contribution. Official, Ministry of Research and Higher Education of Luxembourg, responsible for the production of statistics, July, 2, 2025

Since enrolment and graduation data is always collected and reported by the country where the studies take place (the country of destination, for degree mobility²⁹⁴), incoming students' or graduates' country of origin can be reported. However, no EU-level database reports on outgoing mobile students' country of destination for a given country of origin. Nonetheless, for Eurostat reporting countries, which includes the EU27 and several other non-EU European countries, it is possible to calculate the countries of destination of their outgoing mobile students and graduates, as these are the same as the ones recorded as incoming by the rest of the reporting countries. This means that outgoing flows of students from European countries to non-European countries, such as the US, Canada, Japan, etc. are not available through Eurostat. Since worldwide net mobility flows are by definition the difference between all incoming and all outgoing students, lacking the latter means that the net flow cannot be obtained through Eurostat data.

National higher education mobility data

The cross-country analysis highlights that **no country captures outbound degree mobility flows** in a fully comprehensive manner. Nevertheless, a **small group of countries demonstrates systematic partial coverage, primarily due to the portability of nationally administered financial support schemes**, such as scholarships or student loan systems. In these cases, students remain visible in administrative records despite pursuing their studies abroad. This approach is observed in **Sweden** and similarly in **Denmark** and **Norway**, where a substantial share of students receives public financial support that is maintained during periods of study abroad, enabling ongoing monitoring of outgoing degree-mobile students.

A third key finding concerns **the limited availability of data on international graduates' retention, including their permanence in the host country and participation in national labour markets**. This gap persists even in countries where graduate retention is explicitly recognised as a policy priority (e.g. Czechia). Only a limited number of countries have established regular monitoring mechanisms in this area. Denmark and Poland track the employment outcomes of international graduates through ministerial data systems, while Italy relies on a dedicated university consortium (Almalaurea). Slovenia, in turn, derives retention-related information through the systematic integration of education, employment and social security databases.

Finally, the analysis identifies **a set of countries where graduate retention data are either under development or available only on a non-systematic basis**. The Belgian FWB region is currently implementing a dedicated monitoring instrument (Cadastre du Parcours Éducatifs et Post-Éducatifs), while Malta is exploring the introduction of a graduate tracking system. Elsewhere, relevant evidence has been generated through one-off government-commissioned studies (e.g. Ireland), independent research initiatives (e.g. the Tempus Public Foundation in Hungary), or surveys examining graduates' intentions to remain in the country (e.g. Austria), rather than through permanent data infrastructures.

294 For credit mobility it is the other way around, as the student is still formally counted as enrolled in the country of origin.

4.1.4. Perceptions of imbalance and related challenges in degree mobility

This annex provides selected country examples that illustrate in greater detail perceptions of imbalance and related challenges in degree mobility identified in the cross-country analysis.

In the **Netherlands**, national stakeholders indicate that especially degree mobility is perceived as asymmetric: For every Dutch student studying abroad, around seven international students are enrolled in Dutch institutions. Interview partners express concern that this pattern puts pressure on public finances, institutional capacity and the housing market, and point to the extensive offer of English-taught programmes as one factor contributing to the country's attractiveness²⁹⁵. At the same time, ongoing policy discussions and legislative proposals focus on how to manage this growth in a way that remains compatible with wider openness and internationalisation objectives.

Similarly, in **Denmark**, since 2016, policymakers have expressed concerns about the growing number of EU students enrolled in full-degree programmes and accessing national student grants (SU). This prompted a series of measures often described as a “de-internationalisation” of higher education, primarily through reductions in English-taught study places. Between 2017 and 2021, successive agreements significantly reduced the number of places in English-taught programmes, particularly in business academies and university colleges.^{296,297,298} In 2024, the government signalled a policy shift by easing some of these restrictions. Universities were permitted to expand enrolment in selected English-taught undergraduate and graduate programmes, leading to an increase in international student numbers, particularly in the social sciences, natural sciences, and technical fields²⁹⁹.

In the **French-speaking Community of Belgium**, imbalances have been marked in certain subject areas, particularly medicine, veterinary sciences and related health fields such as kinesiology, where high numbers of French degree-students enrolled in institutions in Wallonia and Brussels (FWB). There are only moderate annual student fees to be paid in Belgium, adding to the attractiveness of Belgium French speaking universities to French degree students. In response, the FWB has introduced quotas on non-resident students for a set of ‘contingented’ programmes, capping their share at 20% or 30% of first-time enrolments depending on the field³⁰⁰. When demand exceeds available places,

²⁹⁵ Available studies in the Netherlands, most notably the 2019 cost-benefit analysis from the Netherlands Bureau for Economic Policy Analysis (CPB), have examined the economic effects of degree mobility primarily from the perspective of the national government budget. The CPB report calculated that each international student cost approximately €7,300 per year (gross fiscal cost), although more recent ministry analysis suggests the true figure may be closer to €13,500 per student per year (€8,500 public financing and €5,000 study financing).

²⁹⁶ [Regeringen skruer ned for optaget på engelsksprogede uddannelser - Regeringen.dk](#)

²⁹⁷ Susan Wright & Matej Zitnansky, 2021, [De-internationalising Danish Higher Education: Re-framing the Discussion](#) Working Papers on University Reform, [Microsoft Word - Working paper 34 of CHEF Final 2.docx](#)

²⁹⁸ Jan Petter Myklebust [Scrapping of English-taught courses hits STEM admissions](#), August 2022

²⁹⁹ Simone Hackett, Denise McAllister Wylie and Steffen [Saxil: Riding the nationalism wave requires a collective approach](#), 22 January 2025

³⁰⁰ Fédération Wallonie-Bruxelles. (n.d.). Coursus contingentés. <http://www.enseignement.be/index.php?page=28010&navi=4482>

a lottery system is used, and in medicine and dentistry a mandatory entrance exam further regulates access, with non-residents admitted only if they rank within the top 15% of eligible candidates.

Austria previously faced extreme inflows into medical programmes, with up to 80% of applicants from Germany. Because medical education is costly but there is no tuition fee for Austrian and other EU students, this high inflow threatened medical and healthcare workforce sustainability, as foreign graduates often did not enter the Austrian labour market. A quota system for medicine and dentistry was introduced to secure domestic medical graduates. Imbalances are also significant in psychology, architecture, and economics³⁰¹. For example, a survey found that most foreign psychology students do not intend to remain in Austria, prompting concerns about future shortages³⁰². Austria also hosts a high share of German speaking Italian degree students in medicine and has policies to attract them, e.g. German- or Ladin-speaking schools in South Tyrol are treated as equivalent to Austrian ones.³⁰³ Given the inflows but also the outflows of Austrians that do not pass the medical entrance exam in Austria and pursue their medical studies in Germany – a combined analysis of inflow and outflow, stay rates and return rates would be needed to understand if there is a net positive effect of the circulation of talent.

Luxembourg does not pursue symmetry, focusing instead on maintaining exchange dynamics.³⁰⁴ Similarly, **Poland** and **Hungary** both promote an active internationalisation strategy that focuses on attracting international degree students. **Germany** broadly fits this profile as well: While imbalances are acknowledged, policy debates have centred more on maintaining openness and, more recently, on the labour-market integration of international graduates rather than on numerical balance as such. In **Lithuania**, national policymakers do not prioritise the balance between incoming and outgoing students. Instead, attention has focused on the mismatch between labour market needs and the study fields most frequently chosen by international students, which until recently were concentrated in the social sciences. In addition, stakeholders have voiced concerns regarding the potential misuse of student visa provisions, noting instances where students from certain non-EU countries may use study visas primarily as a means of entry rather than for genuine academic purposes.³⁰⁵

4.1.5. Country-level costs and benefits of student degree mobility

Overview of national analytical frameworks and evidence gaps

Cross-country analysis confirms that country-level analyses of the costs and benefits of incoming degree mobility (host-country perspective) remain uneven

³⁰¹ https://ec.europa.eu/commission/presscorner/detail/it/ip_17_1282

³⁰² <https://www.diepresse.com/5095202/psychologiestudium-mehr-deutsche-als-oesterreicher>

³⁰³ Haller (2021). *South Tyrol's health system and Austria: more than cross-border cooperation?*

<https://www.eurac.edu/en/blogs/eureka/south-tyrol-s-health-system-and-austria-more-than-cross-border-cooperation>

³⁰⁴ Luxembourg constitutes a specific case in degree mobility due to its small size and limited higher education capacity. Outward mobility is a structural feature rather than a policy objective, and balanced mobility is not considered feasible. This is supported by a highly portable student aid system (AideFi), which enables students to study abroad without geographic restrictions.

³⁰⁵ Based on interview with Ministry of Education, Science and Sports of the Republic of Lithuania.

across Europe, both in terms of coverage (which countries have produced studies) and methodological scope (whether analyses estimate gross impacts, fiscal effects, or net cost–benefit).

Across the mapped countries, around half have produced economic analyses within the past decade that quantify the effects of incoming degree students. These studies most commonly take the form of:

- Economic impact assessments, which estimate the broader economic activity generated by international students in the host country, including their consumption expenditure, contribution to value added and employment, and associated tax revenues;
- Fiscal-return or net public-finance assessments which take a narrower, government-focused perspective, estimating the net return to the public sector by weighing the costs of publicly funded services and subsidies against projected tax contributions - typically modelled under different graduate stay-rate scenarios; or
- More rarely, explicit CBA-type estimates (monetising some costs and benefits and presenting a net result).

A key pattern is that **many analyses focus primarily on the “benefit” side** (gross output, value added, and tax receipts) and do not systematically quantify or compare the full public cost base (e.g., programme delivery costs, broader public services, student support and administrative costs). **A fuller public-cost accounting is included only in several cases** (e.g., France; Germany’s fiscal modelling; Denmark’s net fiscal-return assessment of 2028; Finland’s public-economy net value; Lithuania’s net benefit estimate) (see Annex 4 for comprehensive mapping of country-level economic/CBA of international degree mobility across EU/EEA countries).

A further cross-cutting issue is that **national analyses do not consistently disaggregate incoming students by EU/EEA versus non-EU origin**, even though policy regimes (tuition, student support eligibility, residence and work rights) differ and may shape economic outcomes. Yet systematic EU/non-EU comparative modelling is not a standard feature of national studies, with only some countries gathering and publishing this data.

Country-level data on student expenditure

In France, international students reported average monthly expenditure of €867 in 2021, with the majority financing their studies through family support, savings or foreign scholarships-resources that, in the case of non-EU students in particular, largely originate outside the host economy and therefore function as exports³⁰⁶. Beyond direct consumption, several studies^{307,308} note spillover effects on tourism, as foreign degree students receive visits from family and

³⁰⁶ Campus France. (2022). *L’impact économique des étudiants internationaux en France*. <https://www.campusfrance.org/fr/ressource/l-impact-economique-des-etudiants-internationaux-en-france>

³⁰⁷ Agenzia Nazionale ERAMSUS+ INDIRE, *Università, nuova ricerca sull’impatto economico degli studenti Erasmus+ europei presenti in Italia*, 2025. [Link](#)

³⁰⁸ Rīga Stradiņš University (2025). LASER pētījums par Latvijas augstākās izglītības sistēmu. Available at: https://www.rsu.lv/sites/default/files/imce/Zinas/laser_petijums_2025.pdf

friends and often return as tourists or recommend the host country as a destination. OECD estimates suggest that EU-27 countries generated just over €10 billion in gross revenue from education-related exports in 2019, although this remains modest in comparative perspective: no EU Member State exceeded 0.5% of GDP through educational services exports, compared with 2–8% in major English-speaking destination countries. Latvia recorded the highest share among EU countries (around 0.5%)³⁰⁹.

Evidence from countries conducting net-benefit or CBA-type analyses

In Germany, successive analyses indicate substantial net public returns.^{310,311} A recent study by the German Economic Institute estimates that for every euro invested in international students, the public budget gains around eight euros, assuming a 40% retention rate. For the cohort of approximately 80,000 international students starting in 2022, this would translate into a net gain of €15.5 billion over their lifecycle³¹².

In Belgium (Flanders), a 2021 cost–benefit analysis found that benefits exceeded costs by a factor of 2.4 to 3.1, with particularly high net returns for master’s students and positive results across all education levels³¹³. The study explicitly models post-graduation retention, and the positive outcome is primarily driven by a high stay rate of international graduates entering the local labour market, making it, alongside Germany, the study with the most robust lifecycle methodology.

In France, international students were estimated to contribute €4.65 billion to the economy in 2021. After accounting for public expenditure, the net benefit was assessed at €1.35 billion³¹⁴.

The Economic Benefits of Foreign Students in Lithuania cost–benefit analysis (2023)³¹⁵ estimated the net economic contribution of international students over one academic year. It should be noted that this estimate captures contributions during the study period only – including consumption, tuition fees and taxes – rather than modelling long-term fiscal returns. For an estimated population of 8,000 full-time international students, the total annual economic contribution was calculated at €86.7 million. After accounting for public stipends-received by nearly

³⁰⁹ OECD. (2022). International migration outlook 2022.

https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

³¹⁰ Academic Cooperation Association. (2014). *The Financial Impact of Cross-border Student Mobility on the Economy of the Host Country*, accessed on 01 May 2025. <https://aca-secretariat.be/newsletter/the-financial-impact-of-cross-border-student-mobility-on-the-economy-of-the-host-country-studentische-mobilitt-und-ihre-finanziellen-effekte-auf-das-gastland/>

³¹¹ ICEF Monitor. *Germany recovers an 8x return on investment in international students*, published on 19 March 2025. <https://monitor.icef.com/2025/03/germany-recovers-an-8x-return-on-investment-in-international-students/>

³¹² ICEF Monitor. *Germany recovers an 8x return on investment in international students*, published on 19 March 2025. <https://monitor.icef.com/2025/03/germany-recovers-an-8x-return-on-investment-in-international-students/>

³¹³ De Witte, K., & Soncin, M. (2021). Do international classes pay off? A cost-benefit analysis of the internationalisation of higher education in Flanders. *Higher Education*, 82, 459–476. <https://doi.org/10.1007/s10734-021-00737-0>

³¹⁴ Campus France. (2022). *L’impact économique des étudiants internationaux en France*. <https://www.campusfrance.org/fr/ressource/l-impact-economique-des-etudiants-internationaux-en-france>

³¹⁵ Education Exchanges Support Foundation. Il tyrimas – Užsienio studentų, atvykusių studijuoti į Lietuvą, ekonominės naudos tyrimo ataskaita [“Study of Economic Benefits of Foreign Students Who Came to Lithuania to Study”]. Vilnius: Švietimo mainų paramos fondas, 2023. <https://smpf.lrv.lt/public/canonical/1729513715/452/II%20tyrimas%20-%20U%C5%B4sienio%20student%C5%B3,%20atvykusi%C5%B3%20studijuoti%20%C4%AF%20Lietuv%C4%85,%20ekonomin%C4%97s%20naudos%20tyrimo%20ataskaita.pdf>

half of students and averaging €320 per month-the net economic benefit was estimated at €72.9 million per year, indicating a substantial positive fiscal and economic impact for the host country.

In Finland, incoming degree-mobile students in the 2019–2020 academic year generated a net positive effect of €81 million, combining tuition income, consumption effects and public costs (including income earned by foreign graduates from earlier cohorts)³¹⁶.

The Danish evidence offers an important counterpoint and illustrates the centrality of retention to net fiscal outcomes. A 2018 study³¹⁷ found that 42% of international graduates remained in Denmark two years after completing their education, and just one in three was employed in Denmark within that timeframe. The study concluded that only approximately 30% of international students contribute positively to Danish public finances over their lifetime - before accounting for student grant (SU) and education costs - while approximately 70% represent a net fiscal burden. A 2020 follow-up analysis³¹⁸ further highlighted the specific fiscal pressure arising from EU students' entitlement to student grants (SU) under EU law, with projected SU expenditure for this group estimated to reach DKK 650 million in 2023, exceeding the agreed expenditure cap by DKK 201 million. The Danish case therefore demonstrates that where retention is low, during-studies contributions are insufficient to offset the public investment, and the net fiscal outcome turns negative - particularly in fiscally generous host countries where EU students access student support on equal terms with domestic students.

Mapping of restrictions on English-taught programmes across EU Member States

Mapping shows that, across the EU, formal restrictions on English-taught programmes are relatively limited, but indirect constraints are widespread and often more consequential. Only a small number of Member States impose clear regulatory limits-typically at bachelor level-through language rules (Italy, France), supply controls (Denmark) or, until recently, legal prohibition (Cyprus). By contrast, a much larger group of countries-especially in Central and Eastern Europe-formally permit English-taught provision while constraining access through “**hidden**” **financial barriers**. In systems such as Czechia, Estonia, Latvia, Lithuania, Poland, Slovakia, Romania, Bulgaria and Croatia, and to varying degrees Hungary, Greece and Cyprus, English-taught programmes are often available at first- and second-cycle level, but operate as fee-bearing or premium tracks, while national-language programmes remain free or substantially subsidised. The result is that, in much of the EU, English-medium provision is not primarily restricted by law, but by funding and pricing models, which function as a de facto barrier to participation (see the figure below for country-by-country mapping).

³¹⁶ Finnish National Agency for Education. *Education exports are economically significant in Finland – the growing sector is already worth nearly EUR 1 billion*, published on 20 October 2022. <https://www.oph.fi/en/news/2022/education-exports-are-economically-significant-finland-growing-sector-already-worth>

³¹⁷ Ministry of Education and Research (Denmark), 2018. <https://www.ft.dk/samling/20171/almdel/UFU/bilag/158/1930107.pdf>

³¹⁸ *Regeringen efter ny SU-prognose: Indgreb nødvendigt for at begrænse SU-udgifter til EU-studerende*, Ministry of Education and Research (Denmark), 2020. <https://ufm.dk/aktuelt/pressemeddelelser/2020/regeringen-efter-ny-su-prognose-indgreb-nodvendigt-for-at-begraense-su-udgifter-til-eu-studerende>

Table 9: Mapping of restrictions on English-taught programmes across EU Member States.

Country	Explicit legal / regulatory restrictions on English-taught programmes	'Hidden' restrictions: fee differential by language of instruction (EU/EEA students)	Enrolment caps / numerus fixus for English-taught tracks	Notes & key sources
Austria	No explicit restriction. English-taught programmes freely offered at all levels.	No fee differentiation by language of instruction for EU/EEA students. All students pay the same statutory fee (~€363/semester) regardless of teaching language.	No language-specific caps.	<i>Eurydice national student fees - Austria (2024).</i> ¹
Belgium (Flanders)	No explicit restriction. 500+ English-taught programmes available at bachelor and master level.	No fee differential by language of instruction for EU/EEA students. Uniform regulated fee (~€890–€910/year for non-aided students). No language surcharge.	No caps.	<i>Eurydice national student fees - Belgium-Flemish Community (2024).</i> ²
Belgium (French Community)	No explicit restriction. English-taught programmes permitted, primarily at master/doctoral level.	No fee differential by language of instruction. Eurydice confirms: no differentiation 'depending on... programme taught in foreign language'. Uniform fee for all EU/EEA students (max €1,194/year, 2025–26).	No caps.	<i>Eurydice national student fees - Belgium-French Community (2024).</i> ³
Bulgaria	No explicit prohibition on English-taught programmes. Bulgaria permits and actively promotes English-medium provision to attract fee-paying international students.	Yes - fee differential by language of instruction. Eurydice confirms fee differentiation 'depending on the field of study and programme (taught in foreign language)'. All students, including domestic, are required to pay fees; English-taught programmes carry higher fees than Bulgarian-taught equivalents.	No language-specific caps.	<i>Eurydice national student fees - Bulgaria (2024).</i> ⁴
Croatia	No explicit restriction on English-taught programmes. English-medium provision is expanding, particularly at master level.	Yes - confirmed by Eurydice. Students studying in a foreign language programme pay higher fees in both first and second cycles, alongside part-time students, international students, and students with extended length of study. This applies to both home and international students enrolled on non-state-subsidised places in foreign-language programmes.	No caps.	<i>Eurydice national student fees - Croatia (2024).</i> ⁵
Cyprus	New legislation enacted 2024 to permit foreign-language bachelor programmes at public universities - previously a restriction. Until 2024, public universities in Cyprus could	Fees for English-taught programmes at second cycle are differentiated. Eurydice confirms: 'fee differentiation depending on... programme taught	No formal enrolment caps for English-taught tracks.	<i>Eurydice national student fees - Cyprus (2024);⁶ Eurydice national reforms - Cyprus (2024).</i> ⁷

Country	Explicit legal / regulatory restrictions on English-taught programmes	'Hidden' restrictions: fee differential by language of instruction (EU/EEA students)	Enrolment caps / numerus fixus for English-taught tracks	Notes & key sources
	not offer undergraduate programmes in a foreign language (including English). The parliament adopted legislation in late 2024 authorising foreign-language undergraduate programmes at public HEIs, described by the Ministry of Education as a 'historic breakthrough'. The reform aims to retain Cypriot students who otherwise leave for other EU countries.	in foreign language' at second cycle level. First-cycle home students do not pay fees (in Greek-taught programmes); English-taught bachelor programmes introduced from 2024 are expected to carry fees.		
Czechia	Czech-taught programmes at public HEIs are free for all students regardless of nationality. Programmes taught in a foreign language (English) carry fees for all students - domestic and international alike - with no statutory maximum. HEIs have full pricing autonomy.	Yes - explicit 'hidden' fee differential by language of instruction. Eurydice confirms: 'fees are applied for programmes taught in foreign language' and 'HEIs have full autonomy... there is no maximum limit.' English-taught programmes range from ~€2,000 to €22,000/year.	No language-specific caps.	<i>Eurydice national student fees - Czechia (2024).</i> ⁸
Denmark	Formal cap on English-taught programme places introduced in stages: 25% cut at business academies and university colleges (2017); SU expenditure cap and university programme cuts (2018); further ~3,900 places eliminated at business academies and university colleges (July 2021). Partially reversed from 2024: 1,100 additional places/year reopened from 2024–2028; further 2,500/year from 2029. A further 800 new English-taught places added in 2025 at business academies, university colleges and universities. Policy debate ongoing.	No fee differential by language of instruction for EU/EEA students. Denmark charges no tuition fees to EU/EEA students regardless of teaching language.	Government-controlled sector-wide caps on the number of English-taught study places (supply-side planning), applied in stages since 2017 and partially reversed from 2024. This is distinct from the Dutch institution-level track-specific numerus fixus: in Denmark the government directly limits the number of places available nationally, rather than allowing universities to set their own per-track caps. No institution-level numerus fixus specific to English tracks exists.	<i>ICEF Monitor (2024);⁹ Eurydice national reforms - Denmark.</i> ¹⁰
Estonia	No explicit prohibition. English-taught programmes actively promoted to attract international students.	Yes - de facto fee differential. Free tuition guaranteed only for Estonian-taught programmes for students progressing normally. English-taught	No language-specific caps.	<i>EAIE fee mapping (Eurydice-based);¹¹ Eurydice national student fees - Estonia.</i> ¹²

Country	Explicit legal / regulatory restrictions on English-taught programmes	'Hidden' restrictions: fee differential by language of instruction (EU/EEA students)	Enrolment caps / numerus fixus for English-taught tracks	Notes & key sources
		programmes carry fees for all students including domestic and EU/EEA nationals.		
Finland	No explicit restriction. English-taught programmes widely used as an education export vehicle.	No fee differential by language of instruction for EU/EEA students (all study tuition-free). Non-EU students pay fees in English-taught programmes. English-taught tracks are thus the primary gateway for non-EU fee income.	No language-specific caps.	<i>Finnish National Agency for Education (EDUFI) (2022).</i> ¹³
France	Loi Toubon (1994) historically restricted English-medium teaching; partially liberalised by Loi Fioraso (2013) which permitted English-taught courses where justified by international competitiveness. Most bachelor programmes in public universities remain in French; English-taught provision more prevalent at master level and in private/grandes écoles.	No fee differential by language of instruction as such. Since 2018, non-EU/EEA students pay differentiated higher fees (€2,770/year bachelor; €3,770/year master) regardless of teaching language, but in practice concentrated in English-taught entry programmes.	No programme-level caps specific to English-taught tracks.	<i>Eurydice national student fees - France (2024);¹⁴ Loi n°2013-660 (Fioraso Law).</i> ¹⁵
Germany	No explicit restriction. Over 2,400 English-taught programmes (2025). No legislative cap.	No fee differential by language of instruction. Public universities charge no tuition fees to any student regardless of teaching language.	No language-specific caps.	<i>DAAD Wissenschaft weltoffen (2025).</i> ¹⁶
Greece	No explicit restriction on English-taught programmes. However, Eurydice confirms a specific fee structure: first-cycle programmes at public HEIs are free for all domestic and international students, except for undergraduate programmes taught in a foreign language (targeted at international students), which carry fees.	Yes - targeted fee mechanism for English-taught undergraduate programmes. Eurydice confirms: 'tuition fees apply to international students enrolled in foreign language study programmes' at first-cycle level. This creates a direct price differential: Greek-taught bachelor degrees are free; English-taught bachelor degrees carry fees (for international students).	No formal enrolment caps for English-taught tracks.	<i>Eurydice national student fees - Greece (2024).</i> ¹⁷
Hungary	No explicit restriction on English-taught programmes. English-medium programmes widely available, particularly in medical education attracting large non-EU student populations.	De facto fee differential as a market outcome: Hungarian-taught programmes at public HEIs are largely state-funded and may be tuition-free for eligible domestic students; English-taught programmes charge market-rate fees to all enrolled students. Medical degrees in English can reach €10,000–€16,000/year.	No language-specific caps.	<i>Eurydice national student fees - Hungary (2024).</i> ¹⁸
Ireland	Not applicable - English is the primary language of instruction. No language-of-instruction restrictions arise.	Not applicable.	No caps.	<i>Not applicable.</i>

Country	Explicit legal / regulatory restrictions on English-taught programmes	'Hidden' restrictions: fee differential by language of instruction (EU/EEA students)	Enrolment caps / numerus fixus for English-taught tracks	Notes & key sources
Italy	Significant restriction via judicial ruling. Italian Council of State (January 2018) confirmed that public universities may NOT offer degree programmes exclusively in English, following Constitutional Court ruling (2017). English may be used only if the same content is simultaneously offered in Italian.	No statutory fee differential by language of instruction. English-taught parallel tracks (where offered) do not carry a separate surcharge.	No language-specific enrolment caps.	<i>Council of State, ruling of 30 January 2018;</i> ¹⁹ <i>ACA Newsletter (2018).</i> ²⁰
Latvia	No explicit restriction. Latvia actively promotes English-taught provision to attract fee-paying international students.	Yes - fee differential by language of instruction for all students. Foreign-language (English) programmes carry fees for both domestic and international students. Consistent with the CEE pattern identified in Eurydice data.	No language-specific caps.	<i>EAIE fee mapping (Eurydice-based);</i> ¹¹ <i>Eurydice national student fees - Latvia (2024).</i> ²¹
Lithuania	No explicit restriction. Lithuania actively promotes English-taught provision, particularly for Asian and EHEA students.	Yes - fee differential by language of instruction for all students. Free tuition available only for Lithuanian-taught programmes meeting eligibility criteria. English-taught programmes carry fees for all students including domestic and EU/EEA nationals.	No language-specific caps.	<i>EAIE fee mapping (Eurydice-based);</i> ¹¹ <i>Eurydice national student fees - Lithuania (2024).</i> ²²
Luxembourg	No explicit restriction on English-taught programmes. Luxembourg's HE system is inherently multilingual (French, German, English, Luxembourgish) and English-taught provision is unrestricted.	No fee differential by language of instruction. Eurydice confirms that foreign-language programmes are not available at the University of Luxembourg, making a fee differential by language of instruction a non-issue. All students pay the same fees regardless of teaching language.	No language-specific caps.	<i>Eurydice national student fees - Luxembourg (2024).</i> ²³
Malta	No explicit restriction on English-taught programmes. Malta's higher education system operates primarily in English (alongside Maltese), making language-of-instruction restrictions a non-issue.	No fee differential by language of instruction. As an English-medium system, no differentiation arises.	No language-specific caps.	<i>Eurydice national student fees - Malta (2024).</i> ²⁴
Netherlands	The Internationalisation in Balance Act (WIB - Wet Internationalisering in Balans) was submitted to parliament in May 2024 but has since been abandoned. The proposal would have allowed universities to set admission caps (numerus fixus) for certain English-taught programmes (particularly for non-EEA students) and would have introduced stricter requirements for new English-taught courses and raised Dutch-language proficiency	No tuition-fee surcharge for English-taught programmes for EU/EEA students. All EU/EEA students pay the same statutory fee (~€2,530/year) regardless of teaching language.	Yes - institution-level track-specific numerus fixus for English-taught tracks, introduced via institutional self-regulation and a legal amendment enabling per-track caps (separate from the now-	<i>Government of the Netherlands (2024);</i> ²⁵ <i>UNL (April 2025);</i> ²⁶ <i>ICEF Monitor (October 2024).</i> ²⁷

Country	Explicit legal / regulatory restrictions on English-taught programmes	'Hidden' restrictions: fee differential by language of instruction (EU/EEA students)	Enrolment caps / numerus fixus for English-taught tracks	Notes & key sources
	expectations for international students. Following the abandonment of the WIB, management of English-taught provision is now pursued through institutional self-regulation: converting selected bachelor programmes to Dutch, setting numerus fixus caps for oversubscribed English tracks under existing law, and committing to no new English bachelor programmes. The Netherlands provides five to seven times more English-taught programmes per capita than neighbouring EU countries.		abandoned WIB). As of January 2026, 86 programmes apply a numerus fixus; 11 bachelor programmes cap their English-taught tracks specifically.	
Poland	No explicit restriction. Polish-taught programmes at public HEIs are free for domestic/EU students; English-taught programmes at the same institutions carry fees for all students including Polish nationals.	Yes - de facto fee differential. Polish-taught programmes free for eligible domestic and EU/EEA students; English-taught programmes fee-bearing for all students. HEIs have full autonomy to set fees for English-taught programmes.	No language-specific caps.	<i>Eurydice national student fees - Poland (2024).</i> ²⁸
Portugal	No explicit restriction on English-taught programmes. Portugal has been expanding English-taught provision, particularly at master level, as part of its internationalisation strategy.	No fee differential by language of instruction identified in Eurydice national data for Portugal. Fees are determined by HEIs within government-set ranges, differentiated by field of study but not by language of instruction.	No language-specific caps.	<i>Eurydice national student fees - Portugal (2024).</i> ²⁹
Romania	No explicit restriction on English-taught programmes. Romania permits and offers English and French-taught programmes, particularly at medical universities which attract significant non-EU student populations.	Yes - fee differential by language of instruction. Eurydice confirms: state-subsidised students on foreign-language programmes do not receive tuition-free status equivalent to those in Romanian-taught programmes. In practice, English-taught programmes generate fee income where Romanian-taught state-subsidised places are free.	No language-specific caps.	<i>Eurydice national student fees - Romania (2024).</i> ³⁰
Slovakia	No explicit restriction. Slovak-taught programmes are subject to a maximum fee cap (€2,725/year full-time first cycle); foreign-language (English) programmes have NO maximum cap - HEIs have unrestricted pricing autonomy.	Yes - explicit 'hidden' fee differential. Eurydice confirms: 'programmes conducted in a foreign language bear significantly higher fees' and the maximum fee cap 'does not apply to foreign-language programmes.' English-taught programmes generate uncapped fee income.	No language-specific caps.	<i>Eurydice national student fees - Slovakia (2024).</i> ³¹
Slovenia	No explicit restriction on English-taught programmes. Slovenia offers English-taught programmes, primarily at master level.	No systematic fee differential by language of instruction identified. In Slovenia, fees are paid only by part-time students and those on non-state-	No language-specific caps.	<i>Eurydice national student fees - Slovenia (2024).</i> ³²

Country	Explicit legal / regulatory restrictions on English-taught programmes	'Hidden' restrictions: fee differential by language of instruction (EU/EEA students)	Enrolment caps / numerus fixus for English-taught tracks	Notes & key sources
		subsidised places; this differentiation is by student status rather than language of instruction.		
Spain	No explicit restriction on English-taught programmes. Spain has seen rapid growth in English-medium instruction, particularly at master level and in private universities.	No fee differential by language of instruction identified in Eurydice national data for Spain. Fees are regulated by regional authorities and differentiated by field of study and cycle, but not by language of instruction.	No language-specific caps.	<i>Eurydice national student fees - Spain (2024).</i> ³³
Sweden	No explicit restriction. Long tradition of English-medium instruction, particularly at master and doctoral level. No legislative cap.	No fee differential by language of instruction for EU/EEA students (all study tuition-free). Non-EU students pay fees for English-taught programmes as these are the primary non-EU access route.	No language-specific caps.	<i>Swedish Institute & WSP (2022);³⁴ Eurydice national student fees - Sweden (2024).</i> ³⁵

Source: Consultants' desk research. Unless otherwise noted, fee data from Eurydice National Student Fees interactive portal (2024 edition). Applies to EU Member States only.. Data current to 2024-25 unless otherwise noted. Amber-shaded cells indicate countries where a restriction or differential applies.

Notes

- 1 Eurydice. National student fees - Austria. <https://eurydice.eacea.ec.europa.eu/countries/austria/national-student-fee>
- 2 Eurydice. National student fees - Belgium (Flemish Community). <https://eurydice.eacea.ec.europa.eu/countries/belgium-flemish-community/national-student-fee>
- 3 Eurydice. National student fees - Belgium (French Community). <https://eurydice.eacea.ec.europa.eu/countries/belgium-french-community/national-student-fee>
- 4 Eurydice. National student fees - Bulgaria. <https://eurydice.eacea.ec.europa.eu/countries/bulgaria/national-student-fee>
- 5 Eurydice. National student fees - Croatia. <https://eurydice.eacea.ec.europa.eu/countries/croatia/national-student-fee>
- 6 Eurydice. National student fees - Cyprus. <https://eurydice.eacea.ec.europa.eu/countries/cyprus/national-student-fee>
- 7 Eurydice. National reforms in higher education - Cyprus (2024). <https://eurydice.eacea.ec.europa.eu/eurydice/cyprus/national-reforms-higher-education>
- 8 Eurydice. National student fees - Czechia. <https://eurydice.eacea.ec.europa.eu/countries/czechia/national-student-fee>
- 9 ICEF Monitor. 'Lessons from Denmark: The downside of limiting international student flows', 10 June 2024. <https://monitor.icef.com/2024/03/lessons-from-denmark-the-downside-of-limiting-international-student-flows/>
- 10 Eurydice. National reforms in higher education - Denmark. <https://eurydice.eacea.ec.europa.eu/eurydice/denmark/national-reforms-higher-education>
- 11 EAIE. 'Mapping international student fees in Europe'. <https://www.eaie.org/resource/mapping-international-student-fees-in-europe.html> (based on Eurydice data)
- 12 Eurydice. National student fees - Estonia. <https://eurydice.eacea.ec.europa.eu/countries/estonia/national-student-fee>
- 13 Finnish National Agency for Education (EDUFI). Selvitys suomalaisen koulutusviennin taloudellisesta arvosta. Helsinki, 2022. https://www.oph.fi/sites/default/files/documents/Selvitys_suomalaisen_koulutusviennin_taloudellisesta_arvosta_0.pdf
- 14 Eurydice. National student fees - France. <https://eurydice.eacea.ec.europa.eu/countries/france/national-student-fee>
- 15 Loi n°2013-660 du 22 juillet 2013 relative à l'enseignement supérieur et à la recherche (Loi Fioraso/ESR). Journal officiel de la République française, 23 July 2013.
- 16 DAAD/DZHW. Wissenschaft weltoffen 2025. Berlin: DAAD, 2025.
- 17 Eurydice. National student fees - Greece. <https://eurydice.eacea.ec.europa.eu/countries/greece/national-student-fee>

- 18 Eurydice. National student fees - Hungary. <https://eurydice.eacea.ec.europa.eu/countries/hungary/national-student-fee>
- 19 Consiglio di Stato. Ruling of 30 January 2018, Case No. 00717/2018 (confirming Constitutional Court ruling 2017 and TAR Lombardia 2013).
- 20 ACA. Another 'no' to the programmes fully-taught in English in Italy. ACA Newsletter, February 2018. <https://aca-secretariat.be/newsletter/another-no-to-the-programmes-fully-taught-in-english-in-italy/>
- 21 Eurydice. National student fees - Latvia. <https://eurydice.eacea.ec.europa.eu/countries/latvia/national-student-fee>
- 22 Eurydice. National student fees - Lithuania. <https://eurydice.eacea.ec.europa.eu/countries/lithuania/national-student-fee>
- 23 Eurydice. National student fees - Luxembourg. <https://eurydice.eacea.ec.europa.eu/countries/luxembourg/national-student-fee>
- 24 Eurydice. National student fees - Malta. <https://eurydice.eacea.ec.europa.eu/countries/malta/national-student-fee>
- 25 Government of the Netherlands. 'Aiming for a balanced internationalisation of universities', 13 May 2024. <https://www.government.nl/latest/news/2024/05/13/aiming-for-a-balanced-internationalisation>
- 26 Universities of the Netherlands (UNL). 'Universities rebalance internationalisation', April 2025. <https://www.universiteitenvannederland.nl/en/current/news/universities-rebalance-internationalisation>
- 27 ICEF Monitor. 'Dutch government set to restrict English-taught degrees', 30 October 2024. <https://monitor.icef.com/2024/10/dutch-government-set-to-restrict-english-taught-degrees/>
- 28 Eurydice. National student fees - Poland. <https://eurydice.eacea.ec.europa.eu/countries/poland/national-student-fee>
- 29 Eurydice. National student fees - Portugal. <https://eurydice.eacea.ec.europa.eu/countries/portugal/national-student-fee>
- 30 Eurydice. National student fees - Romania. <https://eurydice.eacea.ec.europa.eu/countries/romania/national-student-fee>
- 31 Eurydice. National student fees - Slovakia. <https://eurydice.eacea.ec.europa.eu/countries/slovakia/national-student-fee>
- 32 Eurydice. National student fees - Slovenia. <https://eurydice.eacea.ec.europa.eu/countries/slovenia/national-student-fee>
- 33 Eurydice. National student fees - Spain. <https://eurydice.eacea.ec.europa.eu/countries/spain/national-student-fee>
- 34 Swedish Institute & WSP Sverige AB. Den ekonomiska effekten av internationella studenter. Stockholm: Swedish Institute, 2022. https://si.se/app/uploads/2022/07/den-ekonomiska-effekten-av-internationella-studenter_juli22.pdf
- 35 Eurydice. National student fees - Sweden. <https://eurydice.eacea.ec.europa.eu/countries/sweden/national-student-fee>

4.1.6. Student and HEI-level costs and benefits

4.1.6.1. For mobile individuals

Soft skills and personal development gained through degree mobility

Research evidence indicates that degree mobility supports the development of a broad range of transferable competences. Students develop skills required to adapt to a different culture, such as flexibility, adaptability, problem-solving, critical thinking, and a deeper understanding and acceptance of cultural differences³¹⁹. They also improve their collaboration skills and international networks³²⁰.

Visa-related financial requirements: country examples

In countries such as France, Germany, Italy and Spain, non-EU students applying for a visa must provide proof of a bank deposit ensuring that they can cover their expenses (beyond just the tuition fees) for the duration of the academic year^{321, 322, 323}.

Additional cost-of-living burdens for mobile students

Beyond differences in average cost of living between countries, mobile students face additional burdens including travel expenses, insurance requirements, and loss of access to family resources. Foreign students may also face higher costs of living than local students due to lower language skills (with foreigner-oriented services being overpriced) or discrimination in the private rental housing market³²⁴.

4.1.6.2. For host HEIs

Countries where international student recruitment is linked to demographic decline

In several countries-most notably Lithuania, Latvia, Estonia, Slovenia, Slovakia, Portugal, and Poland-the expansion of foreign-language programmes and recruitment of degree-mobile students is explicitly linked to maintaining the financial viability of programmes, safeguarding academic staff positions, and preserving institutional capacity in the context of demographic decline.

³¹⁹ Tiessen, R. et al. (2018). Expanding our understanding of ethical considerations in North-South student mobility programs: Insights for improved institutional practice. *Journal of global citizenship and equity education*, 6(1), 1-21.

³²⁰ Chellaraj, G. (2019). *The Economics of International Student and Scholar Mobility: Directions for Research*. World Bank Policy Research Working Paper 8848. <https://ssrn.com/abstract=3384382>

³²¹ Prodirekt. *Education in France: plans for heightened costs for international students*, published 30 December 2023. <https://prodirektgroup.com/2023/12/30/education-in-france-more-expensive/>

³²² The Pie. (2024, January 4). *France set to hike costs for international students*. <https://thepienews.com/france-immigration-law-has-implications-for-intl-students/>

³²³ Le Parisien. (2023, December 20). *Loi Immigration : combien doivent déboursier les étrangers pour étudier chez nos voisins européens ?* <https://www.leparisien.fr/societe/loi-immigration-combien-doivent-debourser-les-etrangers-pour-etudier-chez-nos-voisins-europeens-20-12-2023-GQT4PSWB5RE25FCVNYTLMC2LBU.php>

³²⁴ Fang, C., & van Liempt, I. (2020). 'We prefer our Dutch': International students' housing experiences in the Netherlands. *Housing Studies*, 36(6), 822–842. <https://doi.org/10.1080/02673037.2020.1720618>

Netherlands: HEI revenue from non-EU students

In 2022/23, the Netherlands hosted 122,287 international degree students, of whom 27.7% were non-EEA. Non-EU tuition fee ranges are wide: bachelor €9k–€20k, master €12k–€30k (institutional rate). This makes the Netherlands one of the clearer EU cases where HEIs realise substantial gross fee revenue from non-EU students, though net returns depend on programme costs and scholarships.³²⁵

Operational strain from sudden student influxes: Germany Refugee Crisis and COVID-19

The operational capacity of HEIs can be severely strained by sudden influxes of international students. During the 2015–2016 Refugee Crisis, many countries including Germany faced acute pressures on their internationalisation offices and student support systems.³²⁶ The COVID-19 pandemic similarly exposed important gaps, with some international students experiencing poor services and lack of support (such as information in English, or clarity over the status of student services such as canteens and residences).³²⁷

Policy disruptions affecting international student flows: country examples

HEIs' financial exposure to policy changes is illustrated by several recent cases: capacity-driven inflow restrictions in the UK, Denmark, and the Netherlands³²⁸,³²⁹; US student visa policy changes in 2025³³⁰,³³¹; Brexit, which removed UK students from EU citizenship-based rights; and the war in Ukraine, which led to semi-automatic recognition of refugee status for Ukrainian students, simplifying some administrative procedures.³³²,³³³

³²⁵ <https://www.nuffic.nl/sites/default/files/2023-05/factsheet-international-students-2023.pdf>

³²⁶ Streitwieser, B. & Brück, L. (2025). Competing motivations in Germany's higher education response to the "Refugee Crisis". *Refuge: Canada's Journal on Refugees*, 34(2), 38-51. <https://doi.org/10.7202/1055575ar>

³²⁷ Roshid, M. N. et al. (2023). Interrogating higher education's responses to international student mobility in the context of the COVID-19 pandemic. *Heliyon* 9(e13921). <https://doi.org/10.1016/j.heliyon.2023.e13921>

³²⁸ Financial times. *Almost half of England's higher education providers braced for deficit*, published on 8 May 2025. <https://www.ft.com/content/6dbdfc60-9d83-48ff-9b34-db3ddd08d5b1>

³²⁹ Brooks, et al. (2024). International student mobility within Europe: responding to contemporary challenges. *Higher Education*, 88, p. 1663-1672.

³³⁰ <https://www.dhs.gov/news/2025/08/27/trump-administration-proposes-new-rule-end-foreign-student-visa-abuse>

³³¹ Jeyaretnam, M. *Harvard's international students left in limbo amid legal battle with Trump administration*. Time Published on 23 May 2025. <https://time.com/7288422/harvard-university-international-students-trump/>

³³² Barcakova, M., & Launikari, M. *Geopolitical instability challenges student mobility in European higher education*. *Laurea Journal*, published on 24 June 2024. <https://journal.laurea.fi/geopolitical-instability-challenges-student-mobility-in-european-higher-education/#88085340~:text=Marcela%20Barcakova%20%2C%20Mika%20Launikari>

³³³ Pleschová, G. (2024). Uneven internationalisation of higher education in the European Union: a case study of two universities in Czechia and Slovakia. *European political science*. <https://doi.org/10.1057/s41304-024-00473-w>

4.1.7. Push–pull conditions shaping student mobility and cross-country differences

4.1.7.1. Educational and academic factors

English-taught programmes: data by country (2024)

In 2024, 43% of the on-campus English-taught tertiary education programmes outside the US, UK, Canada, and Australia were in the EEA region. The offer is heavily concentrated at master's degree level (70% of on-campus and 77% of online English-taught EEA programmes). Countries offering more than 2,000 English-taught on-campus programmes include Ireland, Germany and the Netherlands, with France, Italy, Spain and Sweden offering more than 1,000. Countries leading the offer of online English-taught programmes include Germany (201 programmes), Ireland (145), and Spain (115).³³⁴ A 2025 national survey in Germany found that the availability of English-language programmes ranked as the 3rd most important reason for choosing Germany as a study destination, and 2nd most important reason for choosing a particular university.³³⁵

Language-driven flows: key country examples

Gravity-model studies consistently find a statistically significant “common language” effect on bilateral student mobility.³³⁶ Belgium is the #2 destination worldwide for French degree-mobile students: Campus France reports 18,089 French students enrolled in Belgium in 2022.³³⁷ In 2022, the most popular destination for German students was Austria (37,800 students).³³⁸ Spain's Ministry reports that at master's and doctoral level, the majority of foreign students come from Latin America & the Caribbean.³³⁹ Portugal's official statistics showed Brazil was by far the largest international cohort of incoming degree students in 2019/2020 (52%), with sizable numbers from PALOP countries (Angola, Cabo Verde, Guinea-Bissau, Mozambique, São Tomé e Príncipe).³⁴⁰ The reciprocal agreement between Czechia and Slovakia allows their respective students to use their mother tongue when studying in the other country, given the mutual intelligibility of the two languages.

Programme availability and size effects: country data

Several smaller EU countries have very high outgoing mobility ratios: Luxembourg (172%), Cyprus (48%) and Slovakia (21%).³⁴¹ The EU countries with the largest share of tertiary students from abroad are also among the smallest:

³³⁴ <https://takeielts.britishcouncil.org/sites/default/files/mapping-online-english-taught-programmes-in-europe.pdf> Data on the enrolment share represented by these programmes was however not available.

³³⁵ DAAD. (2025). *Ankommen, Studieren, Bleiben: Wie internationale Studierende ihre Zukunft in Deutschland sehen*. https://www.daad.de/en/the-daad/communication-publications/press/press_releases/internationale-studierende-wollen-bleiben-grosse-chancen-fuer-den-deutschen-arbeitsmarkt/

³³⁶ Michel Beine, Romain Noël & Lionel Ragot, The Determinants of International Mobility of Students, CEPII Working Paper No. 2013-30, September 2013, https://www.cepii.fr/pdf_pub/wp/2013/wp2013-30.pdf

³³⁷ <https://curiexplore.enseignementsup-recherche.gouv.fr/pays/BEL/cooperation-internationale>

³³⁸ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/01/PD25_034_21.html

³³⁹ <https://www.ciencia.gob.es/Noticias/2025/enero/informe-universidades-espanolas.htm>

³⁴⁰ <https://www.dges.gov.pt/pt/pagina/nota-comunicacao-social-estatuto-de-estudante-internacional>

³⁴¹ UNESCO Institute for Statistics (2022). *Latest year available.

Luxembourg (50.5%), Malta (23.8%) and Cyprus (20.2%). This reflects a combination of limited domestic programme range, geographical proximity effects, English/shared-language instruction, and statistical sensitivity to modest changes in absolute student numbers.

4.1.7.2. Economic factors

Tuition fee effects: national survey evidence

A large 2025 survey on international students in Germany identified low tuition fees as the first reason for choosing Germany as a study destination, followed by attractive career prospects and availability of English-speaking programmes. A large 2024 survey of international students in Czechia (n≈6,400) highlighted quality of education as the number one reason to study in the country, followed by quality of life, geographical location, cost of living, safety, and availability of courses in English.

Lower cost of living as a pull factor: country example

Romania illustrates this dynamic clearly: it attracts students from French and German-speaking countries partly thanks to EU-recognised programmes in these languages offered at considerably lower living costs than France or Germany.

Post-graduation employment: country-level association

Among the four EU countries with the lowest share of internationally mobile inbound students in 2022, three (Spain, Greece, Italy) also had the highest EU unemployment rates (Eurostat, 2022). While this association may be partly coincidental, it suggests that labour market conditions in the host country are one consideration among others for students pursuing education-based paths to migration.

4.1.7.3. Social, cultural and personal factors

Motivations of international postgraduate students: evidence from Finland

A qualitative study analysing the motivations of international postgraduate students in Finland found that incoming students from developing countries often sought study abroad opportunities due to push factors such as limited programme availability, lower education quality, or restricted employment prospects at home. In contrast, participants from developed European countries were generally driven by personal motivations such as adventure, independence, and global exposure.³⁴²

Geographical proximity and language: detailed country breakdown

Language of instruction (other than English) accounts for a majority of incoming degree-mobile enrolment in: Portugal (70%), Romania (62%), Belgium (58%), Greece (58%), Croatia (52%), France (51%) and Luxembourg (51%). Geographical proximity is the strongest explanatory factor in: Slovakia (69%),

³⁴² Calikoglu, A. (2018). International Student Experiences in Non-Native-English-Speaking Countries: Postgraduate Motivations and Realities from Finland. *Research in Comparative and International Education*, 13(3), 439-456. <https://doi.org/10.1177/1745499918791362> (Original work published 2018)

Greece (65%), Austria (62%), Poland (60%) and Croatia (58%). In countries where national language pull is limited, large English-taught programme supply compensates - most notably in all Nordic countries, Germany, Italy, and the Baltic States. Italy and Spain stand out as countries with both high English-taught programme numbers and relatively low shares of mobile students, possibly linked to their higher unemployment rates. Greece has the highest share of same-language students (Cyprus) while also having the lowest overall mobile student share. Poland and Croatia are outliers: the origin of most international students links to proximity/language respectively, yet both have low unemployment and low overall mobile student proportions.

4.1.7.4. Language proximity categorization

Table 5 in section 2.1.7 of the report utilises the concept of “common language” between two or more countries. This is based on the following categorization per country.

Language proximity between countries is, for the purposes of Table 5 in section 2.1.7 (push and pull factors), defined as follows:

Table 10: Language proximity categorisation by country.

Country	Languages of instruction in public HEIs that are widely spoken in other countries or are mutually intelligible with other foreign languages.
Austria	German
Belgium	French and Flemish (mutually intelligible with Dutch)
Bulgaria	Bulgarian (high intelligibility with North Macedonian)
Croatia	Serbo-Croat variants (Croatia, Bosnia-Herzegovina, Serbia including Kosovo, Montenegro)
Cyprus	Greek
Czechia	Czech (high intelligibility plus special agreement with Slovakia)
Denmark	Danish, Norwegian and Swedish are to some extent mutually intelligible.
France	French
Germany	German
Greece	Greek
Hungary	Hungarian (including minorities in neighbouring countries, mainly Romania and Slovakia)
Ireland	English (including only countries where it has at least a co-official language status)
Italy	Italian (Switzerland and San Marino).
Liechtenstein	German
Luxembourg	French, German
Malta	English (including only countries where it has at least a co-official language status).
Netherlands	Dutch (mutually intelligible with Flemish)
Norway	Danish, Norwegian and Swedish are to some extent mutually intelligible.
Portugal	Portuguese
Romania	Romanian. In some universities: Hungarian, German, French.
Slovakia	Slovak (high intelligibility plus special agreement with Czechia)
Spain	Spanish and regional languages.
Sweden	Danish, Norwegian and Swedish are to some extent mutually intelligible. Swedish-speaking minority in Finland.

4.1.8. Post-graduation Mobility Choices, Labour Market Outcomes and Return Incentives

Retention rates by country

OECD (2022) data on the share of 2015 study permit holders still resident five years later shows wide cross-country variation: Germany (up to 60%), Estonia (~50%), France (~40%), Sweden and the Netherlands (~22%), the UK (~16.5%), and Denmark, Italy, Norway and Slovenia (~14%). Notably, Italy - which at the time lacked a job-search permit - lost over 60% of international graduates in the first year of the sampled period^{343 344}.

A 2018 European Commission report using EU Labour Force Survey data estimated that around 40% of international graduates in the UK, the Netherlands and Sweden had stayed in the host country for over a year after graduation³⁴⁵.

Work permit conversion rates: country data

OECD (2019) data on how foreigners access work permits show large cross-country differences: in France and Italy around half of all work permits were conversions from education permits, while in Norway, Spain, Austria, Luxembourg and Portugal this education-to-work transition path was used by less than 10% of those accessing a work permit - despite policy narratives favouring education paths to legal migration³⁴⁶.

Return incentive schemes: country details

Cyprus

The “Minds in Cyprus” initiative (2024) provides tax and social incentives to repatriating Greek Cypriot professionals holding a recognised university degree. Returnees pay income tax on only 75% of their salary (cap raised to €25,000). The qualifying residency abroad requirement has been eased: instead of 3 consecutive years, returnees need only have worked 3 of the last 5 years abroad³⁴⁷.

Italy

Italy’s “Brain Return” incentives provide large tax breaks for skilled expatriates. Italians (and eligible foreigners) who lived abroad at least two years and move their tax residency to Italy receive 50–70% income tax exemption for 5 years (90% for those relocating to Southern Italy). The programme targets professionals, researchers, academics, entrepreneurs, and individuals with specialised skills in technology, medicine, and finance³⁴⁸.

³⁴³ As a point of comparison more recent data from the German Federal Statistical Office estimated that 46% of students are still in Germany 10 years after starting their studies. A [2025 DAAD survey](#) found that 64% of currently enrolled international students plan to remain in Germany after completing their studies, with the highest stay intention amongst economics, engineering and computer science students.

³⁴⁴ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

³⁴⁵ European Commission. (2018). *Study on the movement of skilled labour: Final report*. <https://doi.org/10.2767/378144>

³⁴⁶ OECD. (2022). *International migration outlook 2022*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/10/international-migration-outlook-2022_140ace0e/30fe16d2-en.pdf

³⁴⁷ <https://cyprus-mail.com/2025/08/28/cyprus-steps-up-effort-to-attract-cypriot-returnees>

³⁴⁸ <https://moving2italy.com/it/fiscale/rientro-cervelli-2025>

Poland

Poland combines tax relief with research grants. Since 2022, the “return tax relief” grants anyone (including ethnic Poles and EU citizens with Pole’s Card) who lived more than three years abroad a four-year exemption on personal income tax for up to PLN 85,528 (€20,000) of annual earnings. In parallel, NAWA’s Polish Returns (Polskie Powroty) scheme funds salaries, research and relocation costs for PhD-holding researchers returning to Polish universities and institutes; NAWA has allocated approximately €18M per annual call for 24/48-month projects^{349 350}.

Bulgaria

The “I Choose Bulgaria” programme (launched September 2025) offers relocation grants of up to €5,100, housing support (~€205/month), transport allowances for 18 months, and wage top-ups (initially 30% of average sector salary, rising to 50% after 12 months) for eligible Bulgarian citizens who have lived or studied abroad for at least one year in the last 18 months. Benefits are conditional on employment and disbursed only after returnees have started work³⁵¹.

Portugal

The Programa Regressar (2019) bundles a 50% income tax exemption for 5 years, subsidies for travel and moving expenses, up to €10,000 in grant/credit lines to start a business, diploma recognition assistance, and language training. It targets Portuguese emigrants and their descendants. The scheme has seen strong demand: 2,851 applications in H1 2025 (30% more than H1 2024), with ~37,000 beneficiaries to date (including family members) and €48.4 million in income tax generated in 2023 alone^{352 353}.

4.1.9. Strategic degree mobility in relation to labour market needs and legal migration pathways

Countries with explicit policies or national strategies linking labour market needs with degree mobility, as discussed in section 2.1.9 of the report, include:

- **Finland:** The Talent Boost programme (2017–2024, revised 2023-2027) is a cross-ministerial initiative to attract international talent from EU/EEA countries, but also from third countries, and integrate students and researchers into Finland’s labour market through streamlined services such as job matching and language training. It focuses on attracting skilled labour from selected countries, increasing international student numbers in a controlled way, and improving graduates’ employment prospects in Finland.
- **Croatia:** Croatia has established a system for tracking graduates’ outcomes after completing higher education. Since 2014, the Agency for Science and Higher Education (ASHE) has conducted surveys to gather data on graduate employment. In 2023, the Ministry of Science and Education of the Republic

³⁴⁹ <https://www.pit.pl/ulga-na-powrot-pit-zero/>

³⁵⁰ <https://nawa.gov.pl/en/scientists/polish-returns>

³⁵¹ <https://bnr.bg/en/post/102191039/the-application-process-for-the-i-choose-bulgaria-initiative-begins-in-september>

³⁵² <https://www.programaregressar.gov.pt/en/>

³⁵³ <https://www.idealista.pt/news/financas/economia/2025/09/01/71353-programa-regressar-bate-recorde-em-2025-e-atrai-mais-emigrantes>

of Croatia published the National Plan for the Development of the Education System until 2075. This plan outlines a set of targeted interventions in Croatia's educational system, including initiatives to align higher education provision more closely with labour market needs and societal needs, while also improving the quality of higher education and sustainability of foreign language study programmes.

- **Czechia:** The Czech Republic has established a targeted approach to attracting foreign students from priority countries in line with broader economic and labour market needs. Through the Czech National Agency for International Education and Research (DZS), Czechia has identified 15 priority countries for student recruitment based on factors such as cultural and linguistic proximity, strong interest in studying abroad, a focus on STEM fields, and high retention potential. Attracting international students is seen not only as a means of internationalising higher education and strengthening Czechia's global reputation, but also as a way to support the economy by retaining graduates for the domestic labour market. The priority country approach is designed to complement, rather than replace, university-level strategies by providing strategic guidance and data. These efforts are supported by national initiatives such as Study in Czechia, Czech Centres abroad, and the institutionalisation of higher education internationalisation at the national level, which together facilitate inbound degree mobility aligned with labour market needs.
- **Netherlands:** To align degree mobility and labour market needs in the Netherlands, recent government strategies place greater emphasis on targeted information provision, financial support for language acquisition, and strengthened cooperation between higher education institutions, employers, and regional authorities to facilitate smoother labour market entry and improve graduate retention. Graduate retention is increasingly framed as a response to labour shortages, particularly in critical sectors and regions affected by demographic decline. New measures aim to link students with employers at an early stage through internships and enhanced career services, while promoting closer regional and sectoral alignment between education provision and labour market demand. New measures seek to connect students to employers early through internships and career services, and to incentivise regional and sectoral alignment between education and labour market needs.
- **Italy:** The *Anagrafe Nazionale degli Studenti e dei Laureati* (ANS), the National Registry of University Students and Graduates, serves several key strategic objectives, such as monitoring and evaluation of the higher education programmes, and facilitating national and international student mobility by simplifying procedures for the recognition of academic credits. Additionally, the registry helps align higher education provision with labour market needs by offering insights into graduate outcomes and emerging skill demand. Another notable initiative is the "Invest Your Talent in Italy" (IYT) programme, which is run by the Italian government (Ministry of Foreign Affairs) in partnership with Italian companies. This program offers scholarships to students from specific countries to pursue master's degrees in high-demand fields in Italy – such as engineering, ICT, management – and pairs this with internships at Italian firms.

- **Estonia:** the Estonian Education Strategy 2021–2035 outlines several objectives related to learning mobility. Among other things, the strategy emphasises the inclusion of international students in Estonian society and their transition to the labour market, including enhanced support measures, such as opportunities to learn Estonian beyond level A2, to encourage international graduates with strong skills to remain in the country.
- **Romania:** The National Strategy for Immigration 2021–2024 (extended to 2025) includes a specific action to encourage employers to hire third-country nationals who have completed their studies in Romania. It also addresses the reintegration of the diaspora by improving access to education, language training, and labour market opportunities. To support returnees, the strategy promotes coordinated action between NGOs and local authorities in the provision of social services and reintegration support.
- **Hungary:** In Hungary, a key instrument to link degree mobility more closely to labour market needs is the detailed graduate tracking system of the Stipendium Hungaricum programme³⁵⁴, which provides valuable evidence for refining the programme and assessing outcomes. Moreover, the annual graduate and student surveys launched by Tempus Public Foundation offer insight to students' work patterns during their studies and graduates' employment destinations.
- **Germany:** Germany's degree mobility policies are closely linked to labour market needs, particularly through the National Skilled Labour Strategy and various DAAD initiatives. These policies aim to integrate international students into the workforce by simplifying residence and work permit procedures and fostering partnerships between universities and employers. The focus is on retaining international graduates in sectors facing skill shortages.

4.1.10. Degree mobility in regulated professions: specific trends, barriers and system implications

This annex provides selected country examples that illustrate in greater detail the mobility patterns and specific challenges identified in the main analysis for study programmes leading to regulated professions (Section 2.1.10).

Austria imposes strict quotas on medical school admissions to limit the share of foreign students. Since 2006, at least 75% of medical and dentistry seats have been reserved for applicants with an Austrian secondary diploma, up to 20% for other EU nationals, and 5% for non-EU nationals³⁵⁵. These quotas were introduced after a surge of German students enrolled in Austria's free medical programmes. The policy aims to ensure enough domestic graduates to staff Austria's health system. In 2017 the European Commission accepted that

³⁵⁴ The programme is based on bilateral education agreements between Hungary and the governments of the sending countries. It is available on five continents in over 100 countries, attracting tens of thousands of international students each year.

³⁵⁵ <https://www.medizinstudieren.at/en/allgemeine-informationen/information-in-english/#>

Austria's 75%/20% quota in medicine was a justified and proportionate measure to protect public health, given data showing the number of Austrian graduates of medical studies had decreased by 38% since 2009/10, while the number of German graduates had risen from 5% to 18%. 90% of graduates holding an Austrian school-leaving certificate carried out their profession in Austria, compared to only 7.5% of German graduates who were employed in Austria between 2008/09 and 2011/12³⁵⁶.

Though the quota helped to address the challenge in the field of medicine, national stakeholders expressed concerns about the same significant imbalances in other study fields, including dentistry³⁵⁷, psychology and economic sciences, where the quota does not currently apply. Internal surveys³⁵⁸ targeting foreign psychology students in Austria conducted at the beginning, in the middle, and towards the end of studies, showed that most of the students did not intend to stay in Austria, prompting national stakeholders to raise concerns about potential shortage of professionals in related fields³⁵⁹.

French-speaking Belgium has likewise instituted quotas to curb an influx of French students in health-related programmes. Starting in 2024, the Wallonia-Brussels Federation limits "non-resident" (mostly non-Belgian EU) students to 15% of first-year seats in medicine and dentistry, 20% in veterinary medicine, and 30% in fields like speech therapy, audiology, physiotherapy/kinesiotherapy³⁶⁰. This policy responds to the large number of French students crossing the border to study under easier admission and low fees, then returning to France for practice – a trend that was leaving Belgian healthcare with training costs but fewer graduates.

For example, at the University of Liège in 2020/21, 700 French nationals were enrolled in medicine (10% of the student body) and about 90% of French medical students at UCLouvain reportedly returned to France after graduating. Though Belgium had attempted similar caps earlier – a 30% cap on non-resident enrolments in medicine, dentistry and other health fields was however first introduced in 2006 when some programmes saw foreign (mostly French) students comprising up to 75% of the intake³⁶¹. As it was argued by the interviewed national stakeholders from Wallonia, limiting incoming foreign medical students is necessary to safeguard the quality of training (e.g. ensuring sufficient funding for one of the costliest study programmes) and to avoid worsening the domestic physician shortfall. Medicine is among the most resource-intensive study programmes, requiring substantial investments in specialised facilities, laboratories, clinical placements and academic staff.

³⁵⁶ <https://europedebate.ie/2019/05/21/european-commission-v-republic-austria-2007-2017-austrias-quota-system-medical-studies-not-infringement-eu-law/>

³⁵⁷ As a condition, Austria agreed to drop quotas for dental studies by 2019 due to no projected dentist shortage.

³⁵⁸ As per interview with Austrian Federal Ministry of Education, Science and Research

³⁵⁹ <https://www.diepresse.com/5095202/psychologiestudium-mehr-deutsche-als-oesterreicher>

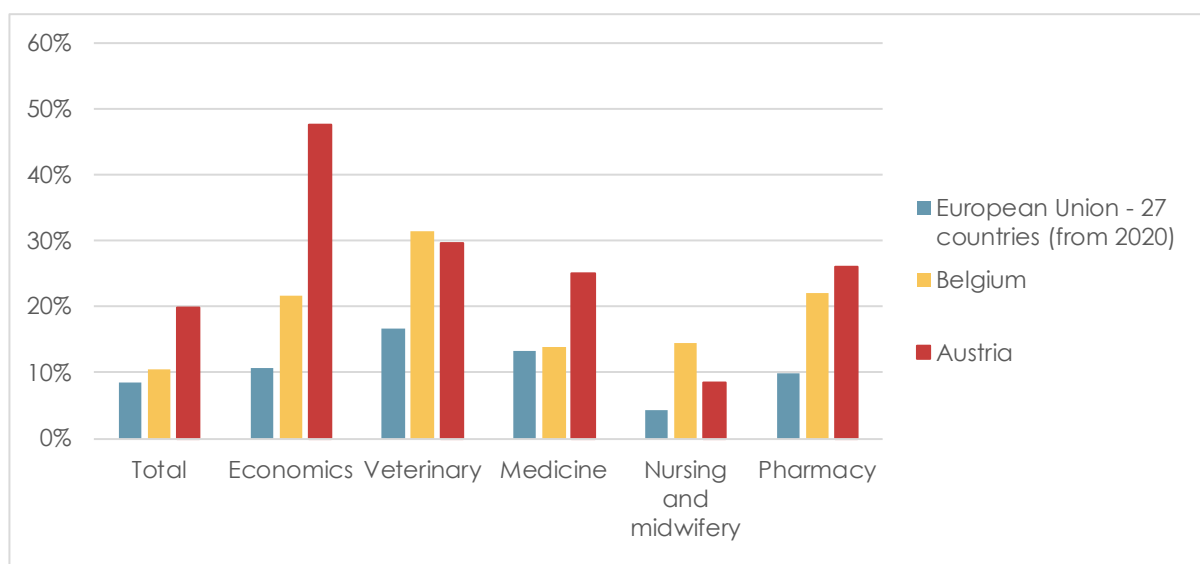
³⁶⁰ <https://www.belganewsagency.eu/wallonia-and-brussels-consider-quotas-for-non-belgian-university-students>

³⁶¹ <https://thepienews.com/belgium-introduces-foreign-student-quotas/>

According to stakeholders, rapid growth in student numbers without a corresponding increase in funding can reduce expenditure per student, increase class sizes and place pressure on access to clinical training opportunities. Over time, this may affect the quality of teaching and supervision, particularly in programmes where practical and patient-based learning are essential components of training.

Recent enrolment data further illustrate these dynamics. In 2023, international students accounted for nearly half of all enrolments in economics programmes in **Austria**, and close to one-third in veterinary medicine. In medicine, a quarter of all students were from abroad. These shares are markedly higher than the EU-27 average, where foreign students make up less than 20% across most regulated fields. Francophone Belgium also shows elevated proportions, with around 30% of veterinary students and over 20% of pharmacy students being non-residents (see the figure below).

Figure 24: Mobile students from abroad (worldwide) as a share of total enrolment, per field of study, per country (2023).



Source: Prepared by study team, based on Eurostat data (educ_uoe_mobs01, educ_uoe_enrt03, 2025)

4.2. Credit Mobility

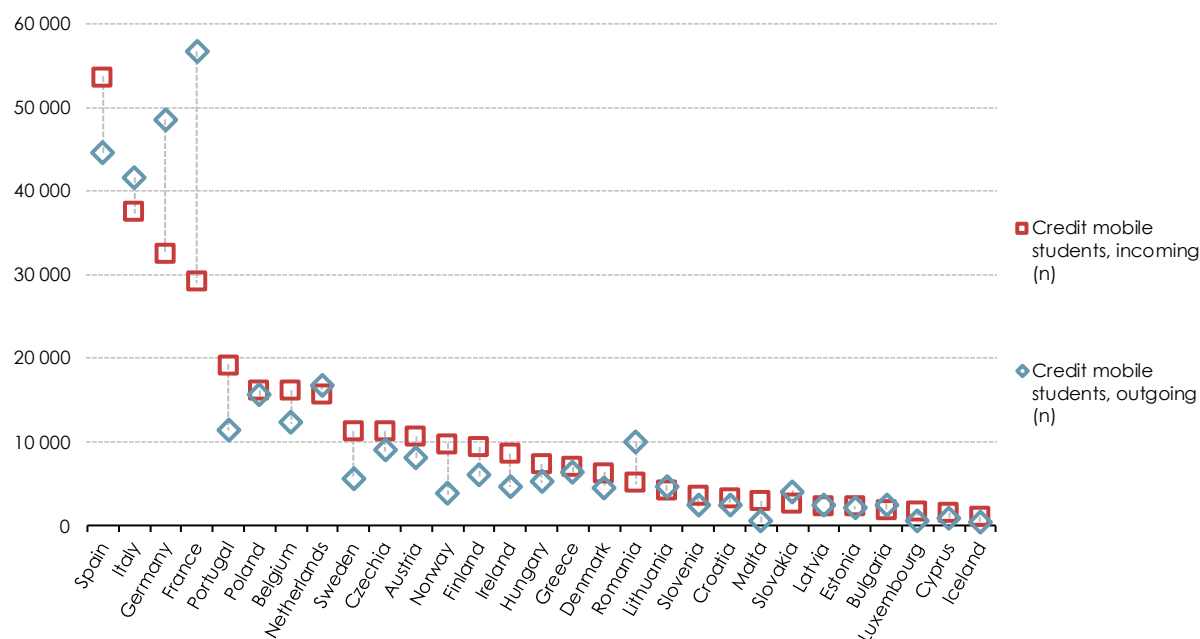
4.2.1. Recent trends and patterns in credit mobility

Credit mobility under Erasmus+

The Erasmus+ *learning mobility for individuals action* (KA1) represents most credit mobility opportunities within most EU/EEA countries. Therefore, this programme deserves its own analysis. Furthermore, Erasmus+ statistics provide a greater granularity than Eurostat's data, as they include individual participant characteristics such the share of people with fewer opportunities³⁶².

As shown in figure 14, in most countries there were more incoming than outgoing students (learning mobility, including both study periods and traineeships) under Erasmus+ learning mobility, or the two numbers were close, with the exceptions of Germany, France, and Romania, who send considerably more than they receive. Italy, and particularly Spain, are considerably ahead in terms of the number of incoming students.

Figure 25: Number of Erasmus+ students participating in study mobility (incoming, outgoing), by country (2023)³⁶³.



Source: Prepared by study team, Erasmus+ data, DG EAC (Data accessed in 09-2025).

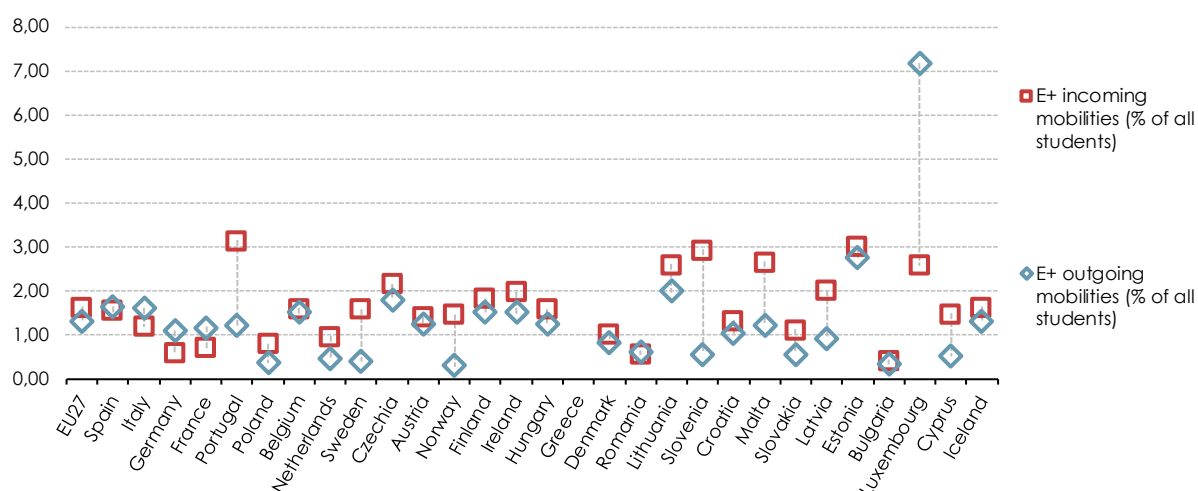
The figure 15 provides a complementary view. When analysing incoming and outgoing credit mobility as a percentage of total enrolment, a more even picture emerges. Under this perspective, countries such as Portugal, Estonia, Slovenia, and Malta are shown to be making the biggest relative effort in terms of incoming

³⁶² Erasmus+ data are not comparable to Eurostat's because Erasmus data concern students and not graduates and do not follow the UOE definitions.

³⁶³ 2023 data includes students from the 2022-2023 and the 2023-2024 academic years.

E+ credit-mobile students as a share of the total student population. In contrast, Luxembourg was a stark outlier in terms of outgoing credit mobility rate, with over 7% of its student population using E+ for outgoing mobility in 2022.

Figure 26: Incoming and outgoing students participating in Erasmus+ at ISCED 5-7 level, as a share of all students at those levels (%), per country (2022)³⁶⁴.

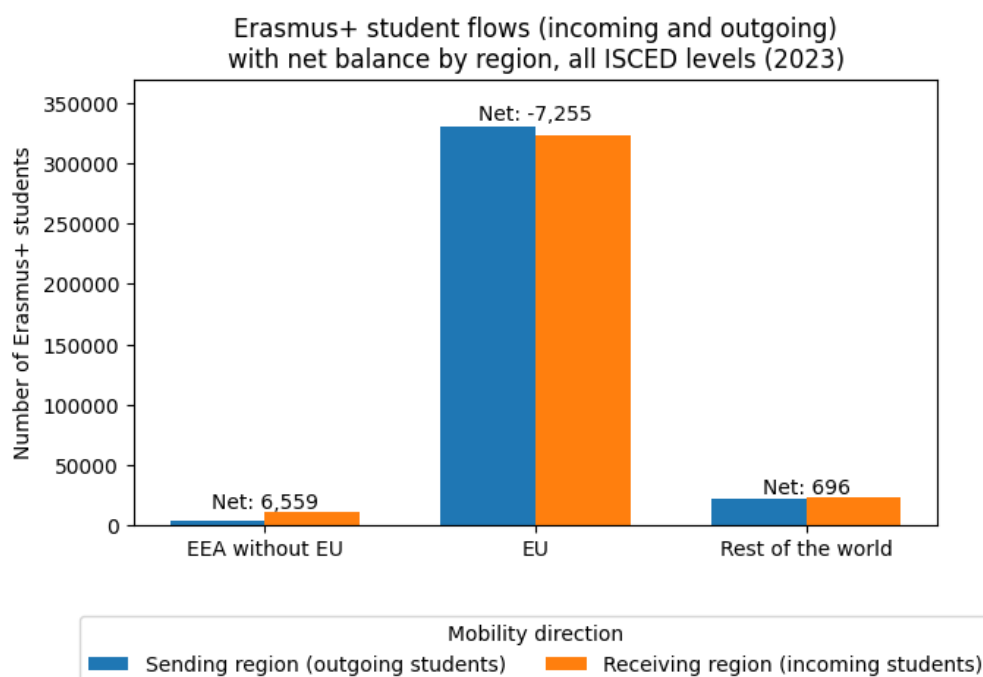


Source: Prepared by study team, Erasmus+ data, EHESO (Data accessed in 09-2025).

As expected for an EU-funded programme, the vast majority of learning mobility experiences under Erasmus+ occur from and to EU countries. Nonetheless, the table below provides some additional insights. For example, Norway and Iceland combined (EEA countries in the table) received 2.5 more students than they sent through the programme. On average, the number of EU students studying outside the EU is similar to those coming to study in the EU from abroad. By level of education, it can be appreciated that many more students from outside the EU come for master's programmes than EU students going abroad for these studies. On the contrary, EU students go abroad more for bachelor's degrees and PhDs than students from abroad coming to the EU.

³⁶⁴ Number of short cycle, bachelor's and master's students in the country's higher education institutions coming from abroad (incoming) or currently studying abroad (outgoing) with support from the Erasmus+ programme, per 1,000 enrolled students at short cycle, bachelor's and master's level.

Figure 27: Erasmus+ student flows (incoming, outgoing, net), per ISCED level and country of origin (2023)



Source: Prepared by study team, Erasmus+ data, EHESO (Data accessed in 09-2025).

4.2.2. Data infrastructure for analysing balanced credit mobility

Study question	What data are available to analyse balanced mobility, and what are the data gaps?
	Eurostat data on credit mobile graduates is the most comprehensive in its disaggregation variables. Erasmus+ data has also a good coverage and granularity, including data on people with fewer opportunities. Two international surveys offer insights on student motivations, barriers and socioeconomic status.

A range of datasets provide information on credit mobility patterns across the focus countries, covering the number of graduates, participating students, ISCED levels, fields of study, and in some cases motivations and barriers to participation. Each dataset, however, has specific strengths and limitations, which are summarised below.

Eurostat provides annual data up to 2023 on the number of credit-mobile graduates who spent at least three months abroad or less than three months abroad during their tertiary education. Breakdowns are available by ISCED level, country of destination, and gender. A key limitation is that UOE data cover only credit outward mobility and only for graduates, leaving a gap with regard to enrolled exchange students per year.

Erasmus+ administrative data cover both incoming and outgoing credit-mobile students, with figures available up to the 2023–2024 academic year. Data include breakdowns by ISCED education level, gender, and field of education, and are

disaggregated at both national and city levels for sending and receiving institutions. These data allow straightforward calculation of balances between incoming and outgoing mobility per country based on the actual student flows per year. The **European Higher Education Sector Observatory** dataset complements this with institutional-level Erasmus+ figures (up to 2022), and the specific indicators on the share of incoming and outgoing mobile students in each focus country by year. For context, Erasmus+ data covers about half of credit mobility flows in the EU (Eurostat, [2023](#))³⁶⁵.

Erasmus Student Network (ESN) survey data (2024) provide insights into the drivers and barriers of mobility. Indicators include the importance of push and pull factors influencing students' decisions, challenges encountered during mobility and their impacts, and sources of funding. However, these data are not available at country level, which limits their use for country reports.

The EUROSTUDENT survey collects a broad set of indicators on 'temporary forms of international mobility', including credit mobility (referred to as 'temporarily enrolled abroad', and is the main category of respondents), work placements or internships abroad, and 'other study-related activities abroad' (e.g. research/field trips, language courses, or summer schools). Its insights include:

- The share of students who have undertaken a temporary study period abroad
- The share of students receiving credit recognition for their time abroad
- The frequency of obstacles to enrolment abroad
- The organisational framework of mobility (e.g. Erasmus+ versus other schemes).

Breakdowns are available by ISCED level and gender. EUROSTUDENT covers students enrolled in ISCED 5–7 programmes but excludes those currently abroad and does not capture ISCED 8. Data from the most recent round (2021–2024) cover 20 EU Member States plus Iceland and Norway, but exclude seven focus countries (Belgium, Bulgaria, Cyprus, Greece, Italy, Luxembourg, and Slovenia). As a result, while EUROSTUDENT provides valuable indicators not available elsewhere, its coverage is incomplete and it cannot be used in isolation.

The Eurograduate survey³⁶⁶ (2022) aims to cover 17 EU countries, of which 9 have available country reports (8 reports were made for the previous 2018 survey), focusing on learning outcomes. It does not, however, establish clear links between learning mobility and those outcomes. It quantifies the students who participated in mobility experiences, with a few disaggregation variables (similar to that reported by Eurostat), but this data is less statistically reliable (compared to administrative data), less relevant for the scope of this study (as it mixes higher education study periods, internships abroad and language courses or summer school programmes abroad), and less recent than Eurostat or Erasmus+ data. It also provides the correlation of specific socioeconomic variables with mobility experiences, with similar results as the Eurostudent survey; notably, that students whose parents have higher education are more likely to participate in mobility.

³⁶⁵ EU programmes accounted for 54% of all (outbound) credit mobile graduates –with mobilities of at least 3 months of duration– within the EU27 countries, the vast majority of which were occurred under Erasmus+.

³⁶⁶ <https://www.eurograduate.eu/>

At national level, most countries utilize indicators aligned with Eurostat and administrative data from Erasmus+ and other national or regional mobility programmes, for their monitoring of credit mobility. In some cases, national sources can offer slightly more recent data, or an earlier estimate of the same data that will be later reported to Erasmus+ and Eurostat. National authorities also have data on scholarships and other benefits offered to credit mobile students, though these are normally reported within the respective mobility programmes.

4.2.3. Push–pull conditions shaping credit mobility choices

The following sections provide detailed country-by-country data from the EUROSTUDENT 8th edition (2024) survey on the share of students reporting each category of obstacle as a “big” barrier to credit mobility. Data are drawn from the cross-country analysis summarised in the main report.

Financial burden as an obstacle – country shares

The share of students reporting financial burden as a major obstacle to credit mobility varies substantially across Europe. The highest shares are observed in Portugal (74.2%), Poland (73.1%), Lithuania (68.9%), Romania (68.2%), Iceland (67.7%), Spain (67.0%) and Ireland (66.3%). By contrast, financial constraints are comparatively lower - though still substantial - in Denmark (46.5%) and Sweden (46.2%), suggesting stronger student support systems or higher baseline living standards in these countries, yet not sufficient to eliminate cost-related barriers.

Social and employment-related constraints – country shares

Separation from partner/children is reported as a major obstacle by more than half of students in Iceland (56.4%), Czechia (52.1%) and Finland (51.1%), and by close to half in Poland (49.8%), Estonia (49.2%) and Norway (49.0%). Concerns about losing a paid job are most prominent in Iceland (56.5%), Norway (53.4%), Austria (50.4%) and Poland (49.7%). The convergence of these two barriers in Nordic and some Central European countries underlines the “work–study compatibility” character of this cluster.

Language, programme-integration and recognition barriers – country shares

Insufficient foreign language skills are reported as a major obstacle by over one third of students in Ireland (41.8%), Poland (40.5%), Slovakia (34.4%), Lithuania (32.5%), Czechia (32.1%) and Hungary (31.0%), while shares are extremely low in Denmark (8.2%), Sweden (8.4%) and Norway (11.2%). Difficult integration into study programme structures is particularly pronounced in Czechia (46.1%), Poland (42.1%), Austria (41.9%) and Slovakia (34.3%). These barriers are frequently coupled with recognition concerns: Poland (38.2%), Czechia (38.4%), Austria (32.6%) and Slovakia (31.3%) all record high shares for perceived barriers related to recognition of studies abroad.

Perceived low benefit of mobility – country shares

The share of students reporting “low benefits for studies” as a major obstacle is highest in Slovakia (36.8%), Poland (34.2%), the Netherlands (31.4%), Ireland (30.8%) and Portugal (30.5%). By contrast, this barrier is least prevalent in Denmark (14.9%), Sweden (19.1%) and Norway (20.3%), consistent with the stronger integration of mobility into curricula in Nordic systems.

Access regulations and programme access – country shares

Access regulations are reported as a major obstacle by over one third of students in Poland (36.8%), and by 30.0% in Portugal and 18.2% in Romania, while they are almost negligible in Norway (3.9%), Denmark (5.1%), Sweden (6.0%) and the Netherlands (6.9%). Similarly, difficulties with access to mobility programmes are highest in Poland (34.7%), Portugal (24.8%), Lithuania (19.9%) and Romania (19.3%), compared to very low levels in the Netherlands (5.4%), Denmark (6.8%), Norway (7.5%) and Sweden (8.0%).

Note on interpreting the gap between mobility intentions and participation

Cross-country EUROSSTUDENT data show a six-percentage-point gap in reported financial obstacles between students preparing to study abroad (48%) and those who already completed a period abroad (42%). Three methodological explanations help account for this pattern. First, the actual impact of obstacles may be **less severe than anticipated during the planning stage**: students may overestimate financial or logistical difficulties before actually undertaking the experience. Second, a **selection effect** operates among students who eventually complete a period abroad: those for whom barriers proved truly insurmountable dropped out before participating, leaving the “completer” group as a select subgroup that faced lower barriers or had access to mitigating resources (additional funding, family support). Third, **cohort composition effects** are relevant because credit mobility is typically undertaken in the later stages of a programme; surveys covering all study years will include many students in early phases who report being “in preparation” and may reassess their perceived obstacles as they progress. These three effects together explain why cross-sectional survey comparisons between the four groups should be interpreted with caution.

4.2.4. Linking credit mobility and degree mobility

Differences between credit and degree mobility pathways

Literature has explored the relationship between credit mobility and degree mobility, highlighting both distinctions and interconnections between the two forms of student mobility. A study by Barrioluengo and Flisi³⁶⁷, at the European Commission's Joint Research Centre found that **degree mobility is more concentrated in a few countries** (with the top destinations at the time being the UK, Germany and France covering almost 80% of degree mobile students. This pattern relates to overall international degree mobility, including students originating from outside the EU, rather than exclusively to intra-EU mobility flows.). In contrast, credit mobility was more evenly distributed across EU

³⁶⁷ Barrioluengo, M. S., & Flisi, S. (2017). *Student mobility in tertiary education: institutional factors and regional attractiveness*. Publications Office of the European Union. doi:10.2760/675338. JRC108895

Member States, with the five largest EU countries at the time (2013)³⁶⁸ being the top five destinations receiving, altogether, just over half of the EU's total credit mobile students. The analysis conducted by the study team indicates that this pattern persisted in 2023, albeit with some changes. In that year, the three largest host countries for degree-mobile students – Germany, France and the Netherlands – together accounted for 49% of all incoming degree-mobile students. This concentration can be partly attributed to the withdrawal of the United Kingdom - previously the leading destination for degree-mobile students in the EU - from the Union. By contrast, the distribution of incoming credit-mobile students under the Erasmus+ programme was somewhat less concentrated: the top three host countries (Spain, Italy and Germany) together represented 37% of all incoming Erasmus+ students in 2023. However, this comparison should be interpreted with caution, as the two forms of mobility are not directly comparable. Degree mobility includes substantial numbers of students from outside the EU and EEA, whereas Erasmus+ credit mobility is predominantly intra-European and operates within a more structured programme framework. Nevertheless, the data suggest that credit mobility is distributed across a wider range of destination countries than degree mobility.

Evidence indicates that urban regions tend to exhibit higher rates of degree mobility but lower participation in credit mobility. **EU students are more likely to participate in credit mobility**, a trend strongly supported over the past decades by the Erasmus+ programme and the implementation of the European Credit Transfer and Accumulation System (ECTS), which facilitates the recognition and transfer of credits earned during short-term mobility across institutions. By contrast, **non-EU students are more often engaged in degree mobility, choosing to pursue full programmes in European countries**, which may partly reflect visa and residence permit frameworks, as well as funding arrangements and administrative barriers that make short-term mobility less accessible for non-EU students³⁶⁹.

Credit mobility and degree mobility in practice often **concentrate in different levels of education**. For example, an EU study found roughly 70% of Erasmus+ (credit) students are bachelor-level, whereas degree mobility tends to involve much more master's or PhD levels³⁷⁰. The 2025 Education and Training Monitor Toolbox data on outward mobility rates by level of education confirm and sharpen this picture. At doctoral level, the EU-average degree mobility rate (13.4%) is more than twice the credit mobility rate (5.4%), indicating a markedly higher propensity for full-degree mobility among doctoral students. By contrast, at bachelor level the credit mobility rate (5.9%) exceeds the degree mobility rate (3.8%), while at master's level credit mobility (9.4%) also outpaces degree mobility (5.5%). This suggests that credit mobility is the predominant form of international experience at bachelor and master's level, while doctoral mobility is distinctive in being driven primarily by degree mobility³⁷¹. For comparison,

³⁶⁸ These findings reflect mobility patterns prior to Brexit and should therefore be interpreted as indicative of structural differences between credit and degree mobility, rather than as a direct description of current destination dynamics.

³⁶⁹ Kehm, B. M. (2020). Higher education systems and institutions, Germany. In: Teixeira, P.N., Shin, J.C. (Eds-in-chief), *The International Encyclopedia of Higher Education Systems and Institutions*. Springer. https://doi.org/10.1007/978-94-017-8905-9_231

³⁷⁰ Lepori, Benedetto et al. (2015), What ETER tells us about student mobility in European higher education, ETER Policy Brief No. 3. Available at: https://eter-project.com/assets/pdf/ETER_student_mobility.pdf

³⁷¹ European Commission, Education and Training Monitor 2025 – Monitor Toolbox, Theme 6.1: Outward mobility rate of graduates by country of origin and level of educational attainment (2023). European Commission calculations based on

Eurostat data show that among the 18.8 million tertiary education students in the EU, 59.3% were studying for bachelor's degrees, 29.3% for master's degrees, and 3.8% for doctoral degrees (with a further 7.5% in short-cycle tertiary education). This indicates that bachelor students' strong presence in Erasmus+ broadly reflects their dominant share in overall enrolments, while Master's and doctoral students are relatively overrepresented among degree-mobile students compared to their share in the total tertiary population, reinforcing the finding that degree mobility becomes relatively more prevalent at doctoral level, while bachelor and master's students are more likely to engage in credit mobility when they move internationally.

4.2.5. Innovative mobility formats and emerging policy instruments

Blended and virtual mobility formats

The cross-country analysis indicates that **most member states recognise the benefits of virtual and blended formats**, which have gained popularity in recent years and are increasingly offered by higher education institutions in countries such as **Greece, Spain, Croatia, Finland, France, Italy, Latvia, Malta, Denmark, Germany, Slovenia, the Netherlands, Czechia, and Slovakia**. Blended mobility, in particular, is frequently highlighted as a promising approach by this group of countries.

While some countries, such as **Croatia**, demonstrate **strong development of virtual and blended mobility options**, others remain in an **experimental phase or lag behind in the implementation**, as seen in **Hungary and Slovakia**, where digitisation of education and the development of virtual mobility options are still limited.

A few countries have **incorporated these formats into their national strategies**. **Germany** promotes the digital dimension of internationalisation through the Bund-Länder Strategy 2024, **Malta** plans targeted actions to implement flexible mobility formats across institutions, and **the Netherlands** supports virtual exchange through dedicated funding schemes.

Blended and virtual formats are expected to **enhance accessibility and inclusiveness**, as acknowledged by countries such as **Norway, Ireland, Sweden, Malta, Germany, Finland, Estonia, Romania, Czechia, and the Netherlands**. By reducing barriers such as financial constraints, geographical distance, and personal commitments, including family and work obligations, digital and blended mobility can enable participation by underrepresented groups, thereby contributing to more balanced mobility and progress toward mobility targets. While both digital and blended mobility are considered more inclusive alternatives to traditional physical mobility, they address different barriers. Digital mobility removes the need for travel entirely, making it particularly beneficial for students facing financial or logistic constraints, whereas blended mobility is less focused on removing barriers entirely and is instead positioned as a stepping

stone to encourage students toward fuller participation in long-term physical mobility³⁷².

However, some **concerns** have been expressed. Feedback from stakeholders in **Denmark** suggests that while blended mobility is viewed positively for reaching students for whom extended periods abroad are financially or logistically out of reach, virtual mobility is often perceived as a poor substitute for physical mobility, lacking immersive and transformative aspects. Interviewees also note that including virtual mobility in credit mobility statistics risks obscuring the extent to which students are actually engaging in physical mobility abroad, thereby complicating the monitoring of progress toward mobility targets. In **Iceland**, stakeholders acknowledge the potential benefits for digital skills and internationalisation but warn that mandatory blended components may discourage professors from hosting students due to increased complexity, and that the virtual component may become a mere formality.

European Universities alliances

In absolute terms, Germany (67) and France (64) have the most HEIs in European Universities alliances, followed by Spain (56) and Italy (46).³⁷³ Relative numbers show Finland (62%), Iceland (57%) and Sweden (56%) as countries with the highest share of more than half of their HEIs participating in the European Universities. Small shares are observed in Slovenia (5%), France (4%), and Spain (3%).

In total, the alliances had set up more than 600 joint learning programmes and courses at all levels, including 159 joint study programmes, 528 short courses with challenge-based learning, 431 short courses leading to micro-credentials, 76 MOOCs and 123 Collaborative Online International Learning (COILs). These diverse formats broaden the scope of mobility beyond traditional long-term study abroad.

Member states such as **Iceland, Hungary, Belgium, Ireland, Slovakia, Lithuania, Slovenia, Czechia, Italy, Latvia, Malta, Austria, and Romania** anticipate that these alliances will **deepen institutional cooperation**, reduce barriers to mobility within member institutions, and thereby **increase credit mobility**.

In addition, the alliances are **expected to foster innovative mobility formats**. The countries **Slovenia, Croatia and France** emphasise the growing role for these networks in short-term and blended mobility, as well as in the development of potential joint European degrees.

Iceland further highlights the potential of these alliances to enhance the **competitiveness of its higher education institutions**.

³⁷² Di Marzo et al.. (2022). *Unleashing the potential of different mobility formats*. https://uni-foundation.eu/uploads/2022_HLITL_Policy%20recommendations_FINAL.pdf

³⁷³ EC (2025). Report on the outcomes and transformational potential of the European Universities initiative. https://erasmusplus.oead.at/fileadmin/Dokumente/erasmusplus.at/Hochschulbildung/European_Universities/report_on_the_outcomes_and_transformational_potential-NC0224860ENN.pdf

Joint study programmes and joint European degrees

Finland and **Denmark** anticipate that they will further facilitate both inbound and outbound degree mobility, thereby **contributing to more balanced mobility flows**. **Hungary** also highlights their potential to increase participation among students in highly structured fields (such as engineering or regulated professions) by **mitigating risks of study delays**. **Croatia** expects that joint programmes will increase the likelihood that students who divide their studies between domestic and partner institutions will re-enter the national labour market. **Spain** and **Italy** emphasise the contribution of joint degrees to **global attractiveness and graduate employability**, noting that multi-country qualifications enhance institutional visibility and the international competitiveness of graduates.

4.2.6. Good practices and financial support mechanisms for credit mobility

This appendix provides additional illustrative country examples related to financial support mechanisms and information provision, which are discussed in Chapter 2.2.6.

Financial instruments such as the **Charles University Mobility Fund in Czechia** at institutional level provide targeted support to encourage outward mobility. In **Ireland**, supplementary financial support has been made available to higher education students from disadvantaged backgrounds, specifically those receiving the **Student Universal Support Ireland (SUSI) grant**³⁷⁴. This measure has demonstrated clear impact, with participation among this cohort rising to 31% in 2024, illustrating the effectiveness of targeted financial assistance in reducing barriers to mobility. The **Swedish student-aid system** (CSN) allows grants and loans to be used for temporary study abroad under the same terms as domestic study. This portability substantially lowers economic barriers and has been shown to have a strong “recruiting effect” for outward mobility. In **Denmark**, the **national student grant system (SU)** along with supplements, is portable and can be used during study periods abroad. Additionally, so as to support mobility for all, the Danish state offer additional grants and loans to cover tuition fees with the aim to ensure equal access irrespective of socioeconomic background.

Italy’s University portal centralises key information and services for students, providing guidance on available degree programmes, admission requirements, application processes, and the completion of administrative steps such as visa procedures and residence permits. Similarly, the Universityadmissions.se website allows applicants to submit a single digital application to multiple institutions, simplifying entry procedures. **Ireland** established the **International Education Mark** (now rebranded as TrustEd Ireland), a quality certification managed by Quality and Qualifications Ireland, which publicly recognises higher education institutions that offer high academic standards and that meet a nationally defined baseline of standards for the ethical recruitment, transparent information provision, and welfare support of international students³⁷⁵.

³⁷⁴ Eligibility for the SUSI grant is based on nationality status, a minimum residency requirement, household income thresholds, enrolment in an approved course, and progression in education.

³⁷⁵ Quality and Qualifications Ireland. (n.d.). *What is TrustEd Ireland?*. <https://www.qqi.ie/what-we-do/quality-assurance-of-education-and-training/what-is-trusted-ireland>

4.3. Inclusive mobility

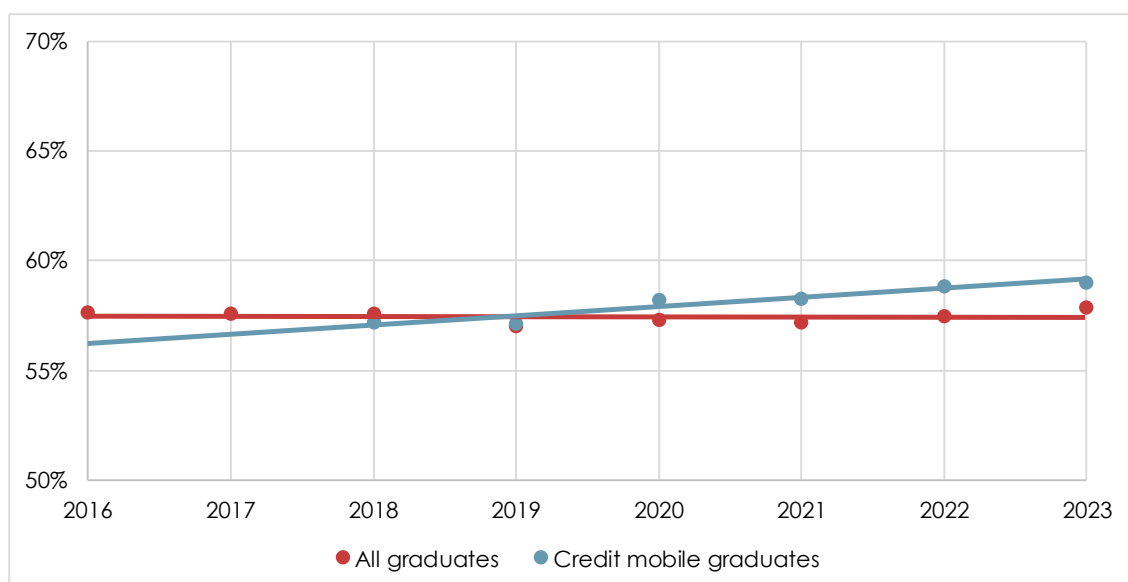
4.3.1. Recent trends and patterns in inclusive mobility

Gender dimension – additional data

Countries with highest shares of female credit-mobile graduates (2023)

Countries with particularly high shares of female credit mobile graduates in 2023 included Greece (72%), Slovakia (67%), Poland (67%), Croatia (66%), and Slovenia (65%). The EU-27 average was 59% for credit mobile graduates and 58% for all graduates.

Figure 28: Share of females among credit mobile graduates and among all graduates (2016–2023).



Source: Eurostat. Figure prepared by study team.

The share of female credit mobile graduates and female total graduates remained largely consistent over the 2016–2023 period. There was a slight increase in the share of female credit mobile graduates and a slight decrease in the share of female graduates overall, but these differences are minimal.

People with fewer opportunities – additional data and definitions

EHEA Bologna Follow-up Group conceptual framework

Outside the EU framework, the EHEA Bologna Follow-up Group on the Social Dimension (2024) provides three complementary definitions. “Underrepresented students” are defined based on participation statistics compared to the average population. “Disadvantaged students” are those facing objective challenges such as disability, other health conditions, care responsibilities or limited family means. “Vulnerable students” are those at risk of disadvantage and who have special protection needs, such as those suffering from mental illness or whose migration status is not guaranteed for the full duration of their studies. These concepts are not yet operationalised at a technical level. Of the three, the concept of

disadvantaged students is closest to the Erasmus+ concept of people with fewer opportunities, though the other two provide valuable additional analytical angles.

Country-level data: share of Erasmus+ participants with fewer opportunities by country

Within the Southern Europe regional average (25.5%), the distribution across countries is relatively balanced overall, though Malta records an exceptionally high share (93%), followed by Croatia (59%) and Slovenia (41%). In Western Europe, Germany stands out with 39% - substantially above the regional average of 22.2%. Country-level data underlying the regional averages in Table 7 of the main report are presented below.

First-generation student participation ratios by country

The countries with the highest ratios of first-generation student participation in learning mobility (i.e. most equitable access) in the EHESO data (2022) include Norway (0.9), the Netherlands (0.85), Austria (0.83), Denmark (0.83), and Finland (0.81). A ratio of 0.9 for Norway means that first-generation students are 90% as likely to participate in learning mobility as non-first-generation students. These ratios reflect the combined effect of national student support systems, institutional outreach practices, and cultural attitudes towards mobility.

Gender dimension – note on male underrepresentation

The relative underrepresentation of male students in credit mobility reflects broader structural patterns in tertiary education rather than mobility-specific exclusion. Women account for around 55% of students enrolled in tertiary education across the EU (Eurostat, 2023), and the gender gap in credit mobility participation closely mirrors this enrolment gap, suggesting that addressing male underrepresentation in mobility requires addressing broader participation patterns in higher education rather than mobility-specific barriers.

Definition expansion between the 2020 and 2021 Erasmus+ Programme Guides

The 2020 Guide identified seven core categories: disability, educational difficulties, economic obstacles, cultural differences, health problems, social obstacles, and geographical barriers. The 2021 Guide substantially broadened these categories. New groups explicitly named for the first time included: NEET youth; people facing structural barriers created by education and training systems; newly arrived migrants; sign-language users; people with linguistic adaptation difficulties; caregivers and breadwinners; people living or previously living in institutional care; and those facing intersectional discrimination. The 2021 Guide also reframed the definition towards a systemic, barrier-based approach (emphasising how systems create obstacles rather than focusing on individual deficits), and extended social barrier categories to include single parents and people experiencing social marginalisation. National stakeholders in Latvia, Lithuania, and Malta attribute much of the post-2021 increase in recorded Erasmus+ participants with fewer opportunities to this definitional broadening.

Regional disparities – funding structure analysis

In several Northern and Eastern European countries, generous national grant and loan systems provide substantial financial support to all students, reducing the need to rely on Erasmus+ inclusion top-up mechanisms to target people with

fewer opportunities. Moreover, many Central and Eastern European countries allocate Erasmus+ participants the highest possible base grant levels; in some cases, these base grants alone exceed the combined value of base plus top-up grants received by participants in countries such as Spain or France, where additional national or regional funding sources supplement Erasmus+ grants. In this context, allocating a larger share of Erasmus+ funds to inclusion top-ups may constrain overall participation volumes, leading national authorities to prioritise broader access to mobility over higher formally-recorded shares of people with fewer opportunities. While this interpretation remains indicative and cannot be fully substantiated with available data, it highlights that lower recorded participation shares may partly reflect funding structures and reporting practices rather than lower policy commitment to inclusion.

4.3.2. Conceptualising inclusive mobility

Conceptual framework: key definitions inferred from the Council Recommendation and Erasmus+ Programme Guide

From the Council Recommendation 'Europe on the Move' and the Erasmus+ Programme Guide 2026, the following interpretation can be inferred:

- **'Inclusive mobility'** is understood as the policy goal in which people with fewer opportunities do not have significantly different chances of participating in learning mobility than the average student.
- **People with fewer opportunities** are identified as those facing barriers or obstacles that may prevent their effective access to mobility opportunities.
- A **barrier** is understood as the lack of adequate support to meet students' diverse needs.³⁷⁶ The emphasis is therefore on whether the education system provides what the student needs in order to participate, not on what the student is or can do.³⁷⁷
- The **Erasmus+ Programme Guide provides the most comprehensive cross-EU definition of people with fewer opportunities**. However, this is only an umbrella definition, which each Programme Country must adapt into operational terms. Therefore, data on mobility rates of people with **fewer opportunities is not directly comparable across countries**. This is understood as an intentional trade-off, as countries may need to reflect some barriers to mobility that are unique to them. The Council Recommendation's call for a common cross-EU methodology (beyond the Erasmus+ programme) is a prerequisite for any EU-level monitoring.

376 Van Mol, C., & Perez-Encinas, A. (2022). Inclusive internationalisation: do different (social) groups of students need different internationalisation activities?. *Studies in higher education*, 47(12), 2523–2538. <https://doi.org/10.1080/03075079.2022.2083102>

377 This is in line with the definition of 'inclusive mobility' by the Inclusive Mobility Alliance, linked to the PLAR-4-SIMP project (Peer Learning Activities and Resources for Social Inclusion in Mobility Programmes): *'creating and ensuring adequate conditions to learn, work, or volunteer abroad for people with fewer opportunities, by addressing their diverse support needs. It is a needs-based approach to what the individual beneficiary needs to ensure a safe and exciting mobility period abroad. It is important to not generalise needs; needs are specific and the individualised aspect is highly important.'*

National definitions of ‘people with fewer opportunities’: country mapping

The Erasmus+ Programme Guide provides a broad, umbrella definition of ‘people with fewer opportunities’ that each programme country must adapt into operational terms. The following country examples illustrate the diversity of national approaches identified through cross-country analysis.

Austria

Austria targets students whose parents did not graduate from higher education (first-generation students) as the primary criterion for the ‘fewer opportunities’ designation under Erasmus+.

France, Italy and Portugal

These countries use primarily income-based criteria to identify people with fewer opportunities. The threshold and calculation methodology vary by country.

Flemish Community of Belgium

The Flemish Community uses legal-status-based definitions, including recognised disabilities, migrant status, and language-related barriers.

Latvia and Lithuania

In both Latvia and Lithuania, each higher education institution has the autonomy to define who qualifies as a “people with fewer opportunities” for the purposes of Erasmus+ additional financial support. This represents the furthest degree of decentralisation identified in the cross-country analysis.

Romania

ANPCDEFP (the National Agency for Community Programmes in the Fields of Education and Vocational Training) publishes criteria for participants with fewer opportunities in higher education, based on an expanded version of the criteria from Ministerial Order 6463/2023. These include students with autism spectrum disorders, students of Roma ethnicity, and first-generation higher education students, among others.

Germany

Germany includes students with children, working students, and students from non-academic families under the ‘fewer opportunities’ definition, reflecting a broader socio-economic framing.

Italy

Italy grounds its definition in the EU Programme Guide and operationalises it through guidance from the Italian National Agency for Erasmus+ (INDIRE). In addition to socio-economic disadvantage and disabilities/health issues, it includes geographical isolation and other circumstances that impede access to mobility.

Changes between the 2020 and 2021 Erasmus+ Programme Guides

The 2021 Erasmus+ Programme Guide significantly broadened and deepened the definition of ‘people with fewer opportunities’ relative to the 2020 guide. Three changes were most significant. First, several groups were explicitly named for the first time: young people not in education, employment or training (NEET); people with structural barriers created by education and training systems; newly arrived

migrants; sign-language users; people facing linguistic adaptation difficulties; caregivers; breadwinners; people living or previously living in institutional care; and those facing intersectional discrimination. Second, the 2021 guide reframed the definition towards a more systemic, barrier-based approach, emphasising how educational systems, discrimination, and cultural or linguistic contexts themselves create obstacles, rather than focusing mainly on individual disadvantages. Third, the new guide introduced stronger nuance in social barriers, extending the list to include single parents, caregivers, people with social marginalisation, and people whose family circumstances limit participation. Overall, the 2021 version made the definition more inclusive, detailed, and aligned with contemporary social policy.

4.3.3. Policy effects and future trends in inclusive mobility

Impact of policies on inclusive mobility

Taken as a whole, it can be said that the country case study reports demonstrate some effects of EU, national and institutional policies on inclusive mobility, however that impact is predominantly evidenced through qualitative and descriptive information, rather than robust and systemic quantitative data and indicators.

EU-level policies and inclusion priorities

EU-level policies, particularly Erasmus+ inclusion priorities, are cited by **almost all countries** as a central driver of inclusive mobility. Countries including Ireland, Denmark, Finland, France, Germany, the Netherlands and Norway explicitly link national or institutional changes to EU requirements. In addition, several countries also reference EU frameworks as providing direction, legitimacy or incentives for actions addressing inclusive learning mobility. In the case of Austria, for example, the National Plan for Inclusion and Diversity for Erasmus+ and the European Solidarity Corps (2021-2027) serves this purpose, as it is a direct implementation of EU programme requirements, that are designed to operationalise Erasmus+ inclusion priorities at the national level.

In several cases (such as Belgium, Portugal, and Spain), EU policies are described as **setting a common language and agenda for inclusion**, even where national data systems for monitoring are still developing. Croatia, Lithuania and Slovenia emphasise that EU funding rules enable targeted support for disadvantaged students that would otherwise be difficult to finance nationally. Czech Republic, Greece and Hungary point to Erasmus+ inclusion measures as strengthening institutional awareness and encouraging the identification of under-represented groups.

National policies, welfare systems and targeted measures

Cross-country analysis indicates that **national policies** support inclusive mobility through funding arrangements, social support systems and higher education governance structures in place. Countries such as Denmark, Finland, Norway, Germany, Austria and the Netherlands highlight comprehensive national welfare or grant systems that help to reduce financial barriers to mobility.

At the same time, countries including France, Ireland, Belgium, Spain, Portugal and Italy emphasise the role of targeted national measures, such as top up grants, social inclusion instruments or dedicated national strategies, which largely complement and reinforce EU inclusion priorities, rather than replacing them. While the scale and nature of national intervention vary, these **measures are generally aligned with EU objectives, and they help to address remaining financial and structural barriers to participation**. Croatia, Lithuania, Slovenia and Hungary report that national policies related to inclusion in mobility are still evolving, with inclusion increasingly embedded in higher education reforms and mobility regulations, although at different speeds and levels of formalisation across countries.

In Czech Republic and Estonia, national frameworks are reported to support inclusion in principle, but with limited monitoring tools to assess impact. Poland and Slovakia note that national policies do enable access to mobility, while institutional capacity and implementation can vary across higher education institutions.

Overall, across all countries, national policies are shown to mediate EU priorities and determine the extent to which inclusive mobility can be practically implemented.

Institutional policies and operationalisation of inclusion

Institutional policies are consistently identified across country reports as the main point where inclusion becomes operational. Countries such as Finland, Germany, France, Ireland, the Netherlands, Norway, Austria and Belgium report well-developed support structures in their HEIs, including counselling services, inclusion officers, preparatory measures and tailored mobility formats. However, it is important to note that the level of formalisation and consistency of these arrangements do vary across systems and institutions.

In countries with less centralised systems or more recent inclusion agendas, such as Croatia, Lithuania, Slovenia, Hungary, Portugal, Spain, Czech Republic and Estonia, institutions often play a compensatory role by developing local solutions, awareness-raising initiatives and individualised support. This is especially the case when the national frameworks are broad, evolving, or less prescriptive.

Several countries (such as Italy, Poland, Slovakia) note that institutional engagement varies significantly, but where strong leadership exists, inclusive mobility practices tend to be more visible. In the case of Poland, for example, it is clear that there is no dedicated national framework for inclusive learning mobility, therefore initiatives to promote inclusion are largely dependent on institutional initiative.

Differences in policy development and descriptions of impact

While countries broadly agree on the importance of inclusive mobility, they differ significantly in how far policies have developed and how impact is described.

Some countries, particularly those with long-standing welfare or student support systems (e.g. Denmark, Norway, Finland), describe inclusion as already embedded in their higher education systems. In these contexts, mobility is supported by a wider social infrastructure, and impact of policy is often discussed in terms of overall participation levels or system stability, rather than more specific

inclusion interventions. In Denmark, for example, access is supported by the national student grant system and other related schemes, and the state also provides further support.

Other countries, such as Ireland or Portugal, place greater emphasis on targeted policy measures introduced in response to EU priorities. Here, impact is described more explicitly in relation to new funding instruments, revised eligibility rules or increased institutional awareness. Ireland's supplementary financial support for disadvantaged students has witnessed increased participation. In addition, participation by underrepresented groups is tracked yearly through programme reporting and institutional data. Overall, these countries often frame inclusion as a developing agenda that has gained momentum in recent years.

In countries where inclusion policies are more recent or uneven (e.g. Croatia, Lithuania, Slovenia, Hungary), differences appear in institutional capacity and data availability. These countries often rely more on qualitative descriptions of change, such as increased awareness, pilot initiatives or emerging support structures, rather than on outcome indicators. Importantly, this does not indicate a lack of impact, but rather different stages of policy development and evaluation capacity.

Future trends

Building on the overall picture outlined above, the country case studies illustrate in more detail how inclusive mobility is likely to develop in the coming years across several key trends.

- **Inclusion as a mainstream policy requirement.** A clear future trend is the gradual shift of inclusive mobility from a set of isolated and sporadic measures to a mainstream policy expectation embedded in broader higher education and internationalisation strategies. Several countries studied already describe inclusion as part of system-level planning rather than as a separate objective. This is particularly evident in Finland, where inclusive mobility is linked to national accessibility and equality strategies, and in Austria and Spain, where internationalisation frameworks increasingly incorporate widening participation. Germany and Ireland similarly frame inclusion in learning mobility within broader diversity and access agendas, rather than as an Erasmus+-specific concern. Even in countries where inclusion policies are still developing, such as Italy, Lithuania and Slovenia, the framing used increasingly points towards integration into national strategies. This suggests that in the future, inclusive mobility is likely to be treated as a standard design principle for mobility programmes and institutional planning.
- **Continued expansion and differentiation of targeted financial support.** Another strong trend relates to the continued growth and increasing differentiation of financial support measures for people with fewer opportunities. Across the country reports, countries consistently identify funding as the most decisive factor influencing participation, and many describe recent or ongoing expansions of targeted top-ups and supplementary grants. Countries with long-standing support systems highlight how national student aid schemes already reduce financial barriers to mobility. At the same time, countries such as Spain, Portugal and Belgium emphasise targeted national or Erasmus+-linked top-ups that

address specific disadvantaged groups. In Croatia, Lithuania, Slovenia and Hungary, targeted financial support is described as an evolving policy area, often directly enabled by EU funding rules. The breadth of countries referencing such measures indicates a future trend towards more nuanced funding models, better aligned with students' real costs and diverse circumstances, rather than one-size-fits-all mobility grants.

- **Growing emphasis on monitoring, evaluation and evidence of impact.** While many countries can describe policy frameworks and support measures, the analysis also makes clear that demonstrating impact remains a challenge, and this is likely to shape future developments. Several countries, including Germany, Ireland, the Netherlands and Hungary, explicitly acknowledge limitations in data availability, disaggregation or longitudinal tracking related to learning mobility of disadvantaged groups. Others, such as Czech Republic, Estonia, Slovakia and Slovenia, note that while inclusion is supported in principle, systematic monitoring tools are still underdeveloped. Luxembourg similarly combines strong financial support for mobility with very limited national monitoring of disadvantaged students' participation, highlighting the issue of evidencing impact even in more well-resourced systems. At the same time, countries that report higher participation rates, such as Finland, Sweden and Norway increasingly use these figures as proxy indicators of policy effectiveness. Taken together, this points to a future trend where stronger data collection, shared indicators and more robust evaluation frameworks will become increasingly important.
- **Expansion of innovative mobility formats as tools for inclusion.** One of the most forward-looking trends is the growing role of innovative mobility formats as instruments for inclusion. Czech Republic explicitly notes that blended mobility has gained momentum since 2021, combining physical mobility with virtual components in ways that can reduce cost, time and logistical barriers. Sweden similarly links blended formats to inclusive institutional practices. Malta highlights flexible mobility formats and points to the role of European Universities alliances in facilitating participation for a wider range of students. Slovakia refers to mobility windows to structurally embed mobility into curricula, making participation easier for students who would otherwise need to extend their studies. These examples suggest that in the future, short-term, blended, flexible and alliance-based mobility will play a growing role in widening access, particularly for students with caring responsibilities, disabilities or financial constraints.
- **Increasing professionalisation of institutional inclusion support.** Across the country reports, institutions are consistently identified as the level at which inclusion becomes operational, and many systems describe increasingly formalised institutional support for inclusive mobility. A wide range of countries, including Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Spain, Finland, France, Greece, Ireland, Hungary, Italy, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Slovenia, Sweden and Cyprus, refer to institutional support structures, such as counselling services, designated inclusion or disability contact points, mentoring schemes, preparatory offers and

administrative support. This therefore points to a future where institutional roles become not only more clearly defined, but more central to the delivery of inclusive mobility.

4.3.4. Good practices, obstacles and financial support for inclusive mobility

4.3.4.1. Obstacles for inclusive mobility

Financial burden

Evidence from cross-analysis indicates that almost every country recognises financial constraints to be among the core barriers faced by people with fewer opportunities, which limit the possibility to support disadvantaged students (e.g. to meet their disability-related needs). In response, countries consistently describe similar types of policy solutions, such as top-up grants, targeted support measures, counselling services and flexible mobility formats (see the sub-section below for more details).

According to ESN, Erasmus+ grants often fail to cover living costs, leaving students to self-fund a large share of expenses. In addition, delays in grant disbursement create short-term liquidity challenges that may discourage participation.³⁷⁸ Housing costs, especially high rents, deposits, and agency fees, are reported as particularly burdensome, disproportionately affecting students from low-income backgrounds.³⁷⁹

Descriptive findings based on EUROSTUDENT 8³⁸⁰ data highlight notable social disparities. **Students from families without tertiary education backgrounds** report financial obstacles more frequently than those from higher-educated households (66% vs. 55%)³⁸¹. Similarly, students with **a first or second migratory background** are more likely to face financial barriers than their peers without a migratory background (64% and 60% vs. 58%)³⁸². The gap is most pronounced among students with impairments limiting their studies: nearly 71% of them view financial burden as a major obstacle, compared to 58% of students without impairments. Multilevel logistic regression analyses by Muja et al. (2024) reinforce these patterns, showing that students with less advantaged parental financial backgrounds, first-generation migrants, and students from non-tertiary educational backgrounds have significantly higher chances of reporting financial

³⁷⁸ ESN (2024). Erasmus+ Overshoot Day has arrived - 23 April 2024. <https://www.esn.org/news/erasmus-overshoot-day-has-arrived-23-april-2024>

³⁷⁹ Lepore et al. (2025). From the freedom to move to the freedom to stay: insights into the student housing crisis in Europe. Erasmus Student Network AISBL. <https://www.thehomeproject.eu/documents/FinalReport.pdf>

³⁸⁰ Social and Economic Conditions of Student Life in Europe. EUROSTUDENT 8 Synopsis of Indicators 2021-2024 https://www.eurostudent.eu/download_files/documents/EUROSTUDENT_8_Synopsis_of_Indicators.pdf.

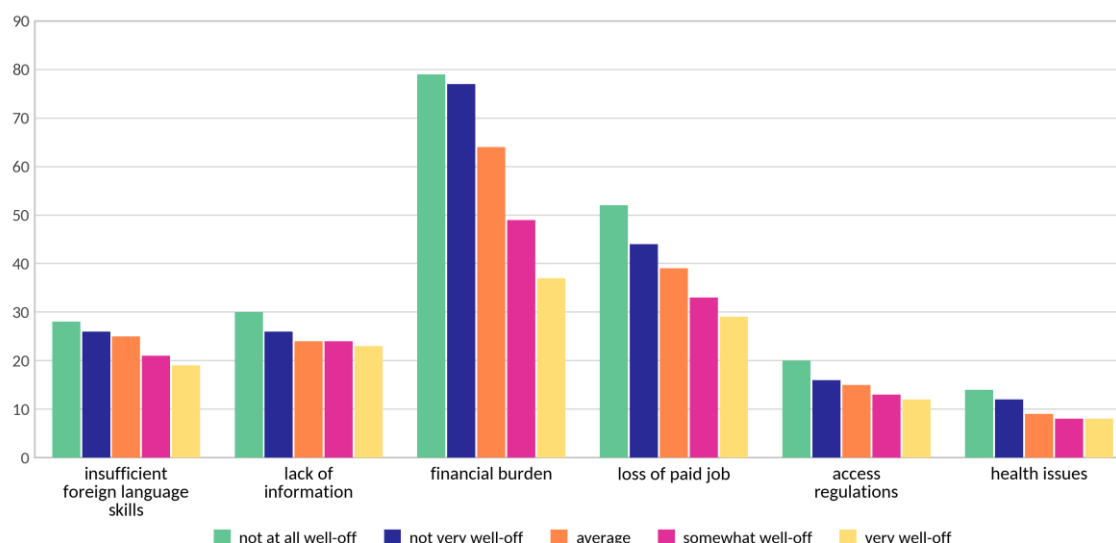
³⁸¹ Countries: Austria, Germany, Poland, Azerbaijan, Hungary, Portugal, Croatia, Iceland, Romania, Czech Republic, Ireland, Slovakia, Denmark, Latvia, Spain, Estonia, Lithuania, Sweden, Finland, Malta, Switzerland, France, Norway, The Netherlands.

³⁸² Note that there is no available data for Estonia, Lithuania, Malta, Romania, and Slovakia

barriers than their respective counterparts.³⁸³ These results underscore the persistent role of financial inequality in shaping access to study abroad opportunities.

Overall, the graph below presents the main barriers reported by Eurostudent respondents who did not participate in learning mobility. Across all indicators, **students from less advantaged socio-economic backgrounds were disproportionately affected**. Financial barriers - in particular the direct costs of mobility and the potential loss of income from a paid job at home - were cited as the most significant obstacles. In addition, students from less privileged backgrounds often face more limited access to preparatory resources such as language training, information, and guidance on study abroad procedures. These factors, combined with insufficient financial support, also constrain their ability to complete essential administrative requirements, including visa applications, making participation in mobility more difficult compared to students from better-off families. Furthermore, cross-country differences in the reporting of health-related barriers should be interpreted with care, as the propensity to report mental or physical health issues varies considerably between countries for cultural and other reasons. Apparent differences in the prevalence of these barriers may therefore partly reflect varying reporting practices rather than genuine differences in the underlying obstacles students face.

Figure 29: Obstacles to temporary (credit) mobility abroad by parental wealth (2022).



Source: Study team, based on [Eurostudent 8 data](#) (collected in 2022, published 2024), using the average score for all 19 EU countries participating in this question of the survey (which do not include all EU27), plus Norway and Iceland. **Note:** This figure refers to outgoing credit mobility. In the Eurostudent survey, the same phenomenon is referred to as “enrolment abroad”, though that use of the concept of enrolment is not aligned with Eurostat’s.

Further, students’ dependence on income sources strongly shapes their ability to participate in learning mobility. Those reliant on self-earned income are significantly more likely to cite the potential loss of a paid job as a barrier, compared to peers whose primary support comes from family. Similarly, students

³⁸³ Muja et al. (2024). Studying abroad for everyone? Obstacles for international mobility among students in EHEA-countries. https://praxis.ee/uploads/2024/10/IB_International-mobility.pdf

who work to cover living costs or to finance their studies are more likely to identify financial burden and job loss as key reasons for not enrolling abroad than those who do not rely on employment.

Social factors

Descriptive findings indicate that the **perceived burden of separation from family and social networks varies across student groups**. Students from households without tertiary education backgrounds report separation from a partner or children more frequently as an obstacle (46%) than students from higher-educated households (35%). In contrast, separation from one's social circle is perceived at similar rates across these groups (36% vs. 37%).³⁸⁴

Furthermore, students with impairments cite relatively more often separation from their social circle as a barrier (42%) compared to students without impairments (38%). For separation from a partner or children, however, the reported shares are identical across both groups.

Multilevel analyses by Muja *et al.* nuance these descriptive findings. Contrary to the assumption that underrepresented students systematically face greater social barriers, the results suggest otherwise. Instead, students with very well-off parents, students without a migration background (i.e. “domestic” students in the authors’ terminology), and students from non-tertiary educational backgrounds exhibit higher probabilities of perceiving social obstacles than their counterparts.³⁸⁵ These findings underline that social barriers to mobility are not uniformly distributed along typical lines of disadvantage.

Practical limitations

Students frequently face fragmented procedures for **recognition of credits, differing requirements for financial aid, and bureaucratic hurdles** related to disability support or visa/residence permits for third-country nationals. These barriers deter especially those students already disadvantaged in navigating higher education systems.

Regression analyses by Muja *et al.* confirm that practical obstacles are disproportionately reported by students from less well-off families, first-generation migrants, and students from non-tertiary educational backgrounds³⁸⁶. These results suggest that practical barriers are not randomly distributed but rather tend to cluster among groups that are commonly classified as underrepresented in higher education and mobility.

Disability status and lack of facilities

The Eurostudent database also provides insight into the reasoning for those students who did not participate in learning mobility. The table below shows that **having a disability impairing one's studies limits students' likelihood of participating in learning mobility for a number of reasons**.

³⁸⁴ Note that there is no available data for Lithuania

³⁸⁵ Muja et al. (2024). Studying abroad for everyone? Obstacles for international mobility among students in EHEA-countries. https://praxis.ee/uploads/2024/10/IB_International-mobility.pdf

³⁸⁶ Muja et al. (2024). Studying abroad for everyone? Obstacles for international mobility among students in EHEA-countries. https://praxis.ee/uploads/2024/10/IB_International-mobility.pdf

Table 11: Obstacles for outgoing credit mobility³⁸⁷.

Obstacles	Average of percentages across all surveyed countries of those with disabilities who selected each indicator	Average of percentages across all surveyed countries of those without disabilities who selected each indicator
Lack of information	29.5%	23.4%
Difficult integration into structure of study programme	32.9%	27.1%
Health issues	28.2%	4.7%

Source: prepared by the study team based on Eurostudent survey. Note: Eurostudent calls outgoing credit mobility “enrolment abroad”, which is not aligned with the use of the word enrolment by Eurostat (reserved for degree mobility).

Descriptive findings based on EUROSTUDENT 8 data further reinforce this picture.³⁸⁸ Students with impairments report practical obstacles more frequently than students without impairments, with higher burdens across all categories of practical difficulties. Additional international evidence supports these observations. Quernin and De Sousa (2024) identify a range of practical challenges faced by students with disabilities, including discontinuities in access to rights, care, and support; difficulties in transporting equipment and treatments by air; and limited access to certain types of local transport ³⁸⁹. They also highlight additional costs, administrative barriers, and the lack of reliable information due to insufficient national and international coordination. The authors emphasise the need for better coordination of administrative procedures to reduce complexity and enhance accessibility.

Lack of information

Literature suggests that many students do not consider mobility opportunities simply because they are not aware of them. This points to shortcomings in the circulation of information about available programmes, financial support mechanisms, and institutional services. In addition, strategies of higher education institutions (HEIs) aimed at inclusive internationalisation, both “at home” and across borders, are often assessed as insufficiently effective in reaching diverse student groups.³⁹⁰ The European Commission’s Joint Research Centre (JRC) highlights that lack of awareness and language skills particularly discourage students in rural areas from pursuing mobility.³⁹¹ Interviews with European Alliances also revealed a lack of awareness regarding mobility offers among

³⁸⁷ This table uses the term “outgoing credit mobility”. In the EUROSTUDENT survey, the same phenomenon is referred to as “enrolment abroad”.

³⁸⁸ <https://www.eurostudent.eu/publications>

³⁸⁹ Quernin and De Sousa (2024). International mobility of students with disabilities. <https://www.cge.asso.fr/wp-content/uploads/2024/06/Exploratory-study.pdf>

³⁹⁰ Van Mol and Perez-Encinas (2022). Inclusive internationalisation: do different (social) groups of students need different internationalisation activities?. <https://doi.org/10.1080/03075079.2022.2083102>

³⁹¹ Joint Research Centre (2024). International learning mobility: lack of language skills and information discourage rural areas’ students. https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/international-learning-mobility-lack-language-skills-and-information-discourage-rural-areas-students-2024-01-09_en

certain student groups. Smaller institutions struggled to diversify student participation.

Descriptive evidence from EUROSTUDENT 8 points to specific group differences. Students with impairments are more likely to report lack of information as a (major) obstacle (29%) compared to students without impairments (23%).³⁹² By contrast, no meaningful differences are observed between students with and without a migration background or between students from low- and high-educated family backgrounds. Taken together, the findings suggest that information barriers are not evenly distributed across all groups of students. While some dimensions of disadvantage, such as migration background or parental education, do not appear to influence perceptions of information gaps, students with impairments seem to face a relatively higher burden.

Monitoring inclusiveness

Cross-analysis of national-level evidence indicates that the **absence of granular, robust monitoring systems, comprehensive data, and long-term targets related to the learning mobility of persons from disadvantaged backgrounds remains a core barrier** across most EU/EEA countries. In most cases, Erasmus+ data on the participation of people with fewer opportunities constitutes the primary-if not sole-indicator used at national level. As a result, the measurement and systematic monitoring of inclusiveness remain largely unresolved challenges.

Efforts to collect reliable demographic data are further constrained by sensitivities surrounding personal data protection, as well as declining participation rates in surveys. Early monitoring initiatives have also been weakened by inconsistent methodological approaches, frequently relying on fragmented data systems with limited comparability and reliability. Strengthening data collection frameworks and harmonising methodologies across countries will therefore be essential to enable meaningful tracking of progress, assessment of policy impact, and the development of evidence-based inclusion strategies.

A further commonality across countries is the widespread acknowledgement of the **difficulty in measuring the impact of inclusion-related interventions**. Even in countries with relatively advanced monitoring systems, such as Finland, Denmark, and the Netherlands, significant limitations persist regarding the availability of disaggregated data. Consequently, assessments of impact often rely on experiential knowledge, implementation practice, and policy logic rather than on robust, quantitative evidence. This shared constraint suggests that the challenge is systemic in nature, rather than attributable to weak implementation or capacity gaps at the level of individual countries.

³⁹² Note that there is no available data for Azerbaijan and Lithuania

4.3.4.2. Good practices for inclusive mobility

Efforts to advance inclusive internationalisation have generated a range of initiatives that address financial and structural barriers to participation. The following good practices illustrate how targeted measures can mitigate obstacles and broaden access to mobility opportunities for underrepresented groups.

Financial inclusion measures

A major policy development in this regard is the introduction of inclusion top-ups under Erasmus+. Evidence from the ESNsurvey XV (2021) indicates that 46% of students perceive these additional financial resources as highly effective in enabling participation³⁹³. By compensating for the often-incomplete coverage of Erasmus+ grants, top-ups provide a more realistic basis for participation, particularly for learners from low-income households. European Alliances such as, RUN-EU, also advocate for top-up grants to support people with fewer opportunities. One interviewee also noted that, in practice, diversity and inclusion objectives are often treated as secondary priorities due to budgetary constraints.

Cross-country analysis shows that Member States providing their own **national top-ups, need-based grants or complementary support for learning mobility of disadvantaged students is one of the most common measures**. Among the numerous Member States that have enacted measures to supplement Erasmus+ grants, some examples include

- **Spain** where different bodies offer financial support mechanisms for mobility, both stemming from the central government (e.g. Ministry of Education, Vocational Training and Sports (MEFD)) and with certain autonomous regions providing their own support measures. However, this means that students from different regions receive different amounts as financial support within the same programme³⁹⁴.
- **Denmark**: support measures are managed centrally by the Danish Agency for Higher Education and Science and are available to support learning mobility both inside and outside the framework of Erasmus+³⁹⁵.
- **In the Flemish community of Belgium**, students identified as having fewer opportunities benefit from several layers of financial assistance³⁹⁶. These include top-up inclusion grants, targeted supplements for short- or long-term mobility, and additional inclusion support to cover real costs such as disability-related expenses, loss of income, or the need for an accompanying person³⁹⁷.

However, cross-analysis results also show that national financial support schemes specifically dedicated to the learning mobility of disadvantaged students

³⁹³ ESN (2023). ESNsurvey XV Preliminary Report. <https://www.esn.org/news/launch-preliminary-results-xv-esnsurvey>

³⁹⁴ <https://eurydice.eacea.ec.europa.eu/eurydica/spain/mobility-higher-education>

³⁹⁵ www.su.dk/english/studies-abroad/conditions-for-obtaining-state-education-support-for-a-whole-study-programme-abroad

³⁹⁶ Online interview. Acting Deputy Director General, Higher Education and Scientific Research, Ministry of the Brussels-Wallonia Federation, April, 22, 2025

³⁹⁷ Note "Inclusion et diversité dans la mobilité de l'enseignement supérieur - Appel 2023" : descriptif des critères d'éligibilité des étudiants pouvant bénéficier d'un statut AMO, www.heh.be/upload/pdf_perso/Note_Inclusion_2024_AC131_Fonds_Nationaux_042024.pdf

remain relatively rare. In most Member States, **mobility-related financial support is embedded within broader student support or social inclusion measures in higher education**, rather than being designed as stand-alone instruments targeting learning mobility. While such integrated approaches can enhance overall access, they also limit the visibility, comparability, and targeted monitoring of mobility-specific inclusion measures across countries.

Short term and blended mobility formats

Inclusive internationalisation can strongly benefit from intensifying virtual and blended mobility opportunities, promoting the participation of students (and staff) who are not able to travel abroad for longer periods of time or at all. Although the added value of these formats compared to (long-term) physical mobility continues to be discussed in the literature, there are still unresolved discussions over the technical definition of these formats (particularly for blended mobility),³⁹⁸ and it is acknowledged that they may not bring students all of the non-academic benefits of in-person mobility³⁹⁹, they are increasingly understood as opportunities for within and between higher education institutions, and as a way to reach students who would otherwise not participate in international mobility^{400,401,402}.

Cross-analysis and national-level interviews across multiple countries consistently confirm that **the expansion of short-term and blended mobility under the current Erasmus+ programming period has been a key driver of more inclusive higher education mobility**. These formats offer greater flexibility and are particularly beneficial for students who are unable to undertake longer mobility periods due to health, financial, or personal constraints.

Examples of good practices regarding Erasmus+ Blended Intensive Programmes (BIPs) include:

- **Austria and the Netherlands**, whose national authorities (OeAD and Nuffic), co-launched a toolkit for Blended Intensive Programmes. The toolkit was informed by a Peer Learning Activity (PLA), that gathered multiple stakeholders from different Member States and addressed various measures to better BIPs and overcome perceived challenges⁴⁰³.
- Since 2021, blended mobility has expanded across **Czech** higher education institutions. By combining short physical mobility periods with virtual components – most notably through Blended Intensive Programmes (BIPs) – this format enables participation by students who

³⁹⁸ Grumbinaite et al. (2025). Report on the outcomes and transformational potential of the European Universities initiative. <https://op.europa.eu/en/publication-detail/-/publication/db43f6ca-da14-11ef-be2a-01aa75ed71a1/language-en>

³⁹⁹ Koris et al. (2021). From real to virtual mobility: Erasmus students' transition to online learning amid the COVID-19 crisis. <https://doi.org/10.1177/14749041211021247>

⁴⁰⁰ Grumbinaite et al. (2025). Report on the outcomes and transformational potential of the European Universities initiative. <https://op.europa.eu/en/publication-detail/-/publication/db43f6ca-da14-11ef-be2a-01aa75ed71a1/language-en>

⁴⁰¹ Koris et al. (2021). From real to virtual mobility: Erasmus students' transition to online learning amid the COVID-19 crisis. <https://doi.org/10.1177/14749041211021247>

⁴⁰² European Commission/EACEA/Eurydice (2022). Towards equity and inclusion in higher education in Europe. Eurydice report. Publications Office of the European Union. <https://op.europa.eu/en/publication-detail/-/publication/fa946919-b564-11ec-b6f4-01aa75ed71a1/language-en>

⁴⁰³ <https://oead.at/en/bildungssystem-entwickeln/europaeischer-hochschulraum-und-bologna-prozess/international-peer-learning-activity-on-erasmus-blended-intensive-programmes>

are unable to undertake semester-long mobility. While participation in blended mobility cannot be systematically monitored, as it is not separately identified in the SIMS register, stakeholder interviews indicate that it has been particularly effective in supporting students with disabilities and those with family or work commitments, by reducing both financial and logistical barriers to participation.

- **Germany's** Bund-Länder Strategy 2024 and the DAAD Diversity Agenda⁴⁰⁴ emphasise that mobility programmes should be accessible to all students, irrespective of gender, ethnicity, disability, family background, or employment status. Higher education institutions holding the Erasmus Charter are required to actively advance inclusion objectives by setting institutional targets and adapting mobility formats to the needs of their student populations. Key measures include the expansion of blended mobility and digital exchanges, as well as targeted outreach to rural, working, and non-traditional students.

Embedding internationalisation into the curriculum

Embedding international and intercultural dimensions into the formal curriculum ensures that mobility-related learning outcomes are not dependent on extracurricular participation, which can be inaccessible for students constrained by financial, family, or work obligations. Evidence suggests that this strategy helps circumvent structural barriers and increases inclusiveness by making internationalisation a standard part of the study experience⁴⁰⁵.

Most Member States' universities offer designated mobility windows within their degree programmes, whether through exchanges or double degrees. While these programmes often stem from university-specific strategies and decisions, a few Member States have national policies and action plans that explicitly promote these approaches.

- **Austria's** Federal Ministry of Women, Science and Research emphasises the internationalisation of courses as a policy priority, and an important asset for the labour force⁴⁰⁶. As per the Ministry's official website, the process of internationalisation should take place both through the design of the courses, and the "hidden curriculum", which is defined as "all tacit assumptions and fundamental positions and beliefs which influence learning situations, such as the implications of the marking criteria, deadlines, approachability of teaching staff, their role, terms and concepts"⁴⁰⁷.
- **Hungary's** Tempus Public Foundation, which operates under the Ministry of Culture and Innovation, published guidelines on the *Introduction of Mobility Windows for HEIs* promoting them to remove obstacles for disadvantaged students to engage in academic exchanges⁴⁰⁸.

⁴⁰⁴ DAAD (n.a.) [Diversity](#); DAAD (2025). [Shaping Change through Diversity and Inclusion. The DAAD Diversity Agenda](#).

⁴⁰⁵ Van Mol and Perez-Encinas (2022). Inclusive Internationalisation: Do Different (Social) Groups of Students Need Different Internationalisation Activities? <https://eric.ed.gov/?id=EJ1371297>

⁴⁰⁶ www.bmfwf.gv.at/en/science/studying/mobility.html

⁴⁰⁷ www.bmfwf.gv.at/en/science/studying/mobility.html

⁴⁰⁸ <https://tka.hu/getDoc.php?doc=abf0fd8db03e5ecb199a9b82929e9db79b909643>

Monitoring, data collection and guides for inclusive mobility

Platforms such as *InclusiveMobility.EU*⁴⁰⁹ have advanced the conceptualisation and operationalisation of inclusive mobility. By mapping social inclusion measures and stakeholder needs across the European Higher Education Area (EHEA), they provide both resources and guidance to institutions. However, InclusiveMobility.eu currently displays substantial data gaps, and available information on the platform suggests that updates have been limited in recent years for most countries. This is a recurrent challenge of EU-level projects in the domain of education information management, which have a clear value-adding deliverable, but lack a strategy to maintain its relevance over time. Data gathering and dissemination exercises, the building of digital libraries, and other similar initiatives require high effort to build and lower effort to periodically update but fail to transition from a time-bound project to a permanent resource with a small maintenance budget, whether this is operated by an EU agency or by a stakeholders' consortium.

Initiatives such as the Erasmus+-funded *PLAR-4SIMP* project (Peer Learning Activities and Resources for Social Inclusion in Mobility Programmes) and Unite!'s IDEM programme have developed practical toolkits, and addressed barriers specific to students with disabilities, refugees, and first-generation students. Similarly, the CIVICA for All platform provides displaced and refugee students with access to peer networks, workshops, and scholarship information, demonstrating how targeted measures can broaden participation beyond financial aid.⁴¹⁰

Though monitoring and systemic data collection at national level remains one of the core challenges for inclusive learning mobility, cross-analysis provides some emerging national-level initiatives to address this gap. **Romania** has launched a national initiative aimed at improving data collection on inclusive mobility within higher education. The Ministry of Education and Research is currently implementing the national data collection platform called PNRUIS, which will integrate the two existing national platforms, ANS and RMUR, as reported by the interviewed national contact point. This initiative establishes a comprehensive, standardized, and digital reporting mechanism with direct online interconnections to universities and institutional partners-streamlining data submission, reducing redundancies, and ensuring consistency across platforms. A key objective is to support inclusive mobility by enabling monitoring and transparency on wide-ranging student and researcher participation-including underrepresented or disadvantaged groups.

⁴⁰⁹ Inclusive Mobility platform webpage. *Inclusive mobility*, accessed on 10 June 2025. <https://inclusivemobility.eu/>

⁴¹⁰ See for further information: <https://www.civica.eu/society/civica-for-all>

Annex 3. Foresight analysis: supplementary material and methodology

4.4. Supplementary material on future scenarios

4.4.1.1. Scenario 1: Features, winners and losers, and conditions for occurrence

Features of intra-EU degree mobility and main benefits and challenges

Mobility features in this scenario are shaped by:

- The geopolitical context is characterised by sustained political tensions and heightened risk perception. This makes the dismantling of cohesion- and inclusion-oriented instruments politically costly. As a result, the EU protects and strengthens social cohesion frameworks in mobility and beyond (e.g. Cohesion policy) as a way to sustain the perceived utility of the EU framework and its role in favouring social cohesion. Degree mobility benefits from this defensive cohesion logic, while trust, predictability and long-term cooperation between Member States remain uneven and, in some cases, weakened. The EU education and mobility framework formally persists, but implementation becomes more cautious and increasingly differentiated at Member State level. Additionally, selective national or regional co-financing support mechanisms are offered. The combination of EU instruments and selective national or regional co-financing reduce the impact of household income on access to mobility by lowering or waiving tuition fees – where existent – and covering part of living costs.
- Media and, in particular social media, provide narratives amplifying geopolitical tensions, which strongly condition students' decisions regarding degree mobility and their selection of the mobility destination.
- Economic uncertainty, especially regarding study and post-study employment prospects, long-term residence security and social protection coordination varies significantly across EU MS. Students perceive higher risks in countries more exposed to geopolitical tensions, which further reinforces destination clustering and graduate retention patterns.
- Digitalisation in higher education stabilises rather than transforms mobility. Administrative digital tools (digital credentials, online admissions, AI-supported eligibility checks) improve efficiency and continuity, while online and hybrid provision expands modestly as a fallback option. Overall, digitalisation supports cautious institutional behaviour and helps manage uncertainty, but it does not counteract risk-driven clustering or significantly enhance diversification or circulation.

In this context, intra-EU degree mobility is characterised by:

- *Improved financial accessibility of mobility.* Partial public income substitution-through EU-level instruments and selective national co-financing-reduces the role of household income as a gatekeeper for degree mobility, even though this does not entirely disappear across all countries and social categories. Students from disadvantaged groups are more likely to consider long-term mobility than in the past, as participation costs are more often covered, albeit some of them may still be excluded (e.g. students highly dependent on continuous employment income).
- *Stagnant or declining overall mobility flows.* Despite improved affordability, overall degree intra-EU mobility does not increase substantially and may decline. Geopolitical uncertainty, perceived safety risks and uncertainty about residence rights and post-graduation prospects discourage students from committing to full degrees abroad. Therefore, degree mobility persists primarily among students who can manage prolonged uncertainty, even when financial support is available. For others, mobility shifts towards shorter, credit-based or blended formats, reinforcing a dual mobility system.
- *Social diversification, but geographical clustering of mobility flows.* Mobility flows concentrate in a limited number of countries and institutions perceived as politically stable, socially and economically secure and administratively predictable. This results in a strong clustering of mobility destinations. Clustering is reinforced not only by safety considerations, but also by the predictability of welfare arrangements, access to student employment and institutional capacity to manage uncertainty. Consequently, imbalances between EU MS are reinforced.
- *Asymmetric circulation and retention causing increased unbalanced distribution of costs and benefits of mobility flows among EU MS.* In an unstable geopolitical environment, students who move are more likely to remain in the host country after graduation, particularly when returning home or moving in another destination is perceived as risky or uncertain. This weakens circulation and reciprocity, reinforcing one-directional flows. For countries outside the perceived “safe cluster”, this unintentionally accelerates permanent outflows, exacerbating labour shortages, brain drain and weakening balanced mobility.

Mobility patterns in this scenario bring about gains and losses for specific actors.

- *Winners:* i) students from lower-income households who can now afford degree mobility; ii) receiving countries perceived as safe, which benefit from more diverse student inflows and graduate retention. Both universities and employers in these countries gain from mobility flows. However, when inflows surpass education, housing, labour market and social security capacity, gains are offset by pressures in these areas.
- *Losers:* i) sending countries/regions outside the “safe cluster”, facing intensified brain drain and labour shortages; ii) potentially receiving countries/regions which are unable to counteract negative safety

perceptions despite mobility affordability or academic quality; iii) students strongly dependent on continuous employment income, who despite improved affordability of mobility costs cannot interrupt income support. They remain underrepresented in the mobility, increasing stratification by risk tolerance rather than by formal eligibility.

It also triggers (some) advantages and challenges for the achievement of EU targets. Advantages consist in particular in the **increased achievability of inclusive mobility targets**, as a lowering in financial barriers favours social diversification of mobility. Nevertheless, inclusivity achievement may differ from one MS to another, following partial reliance on selective national tools and complementarity in practice between Cohesion policy (i.e. ESF+) and mobility funds. Challenges refer in particular to **stagnant or decreased mobility flows** and **unbalanced mobility flows**, following geopolitical uncertainty and concentration in destinations perceived as safe and socially reliable, one-directional outflows from “less safe” MS, high exposure to volatility and crisis management for higher education institutions and long-term insecurity for individual learners.

Main conditions for the occurrence of this scenario

While this scenario aligns with several current trajectories (e.g. a strong policy focus on improving the inclusivity of mobility, the reduction of financial barriers to degree mobility, rising geopolitical sensitivity, and an increasing emphasis on safety issues), its occurrence depends on the evolution of a set of interrelated uncertainties, which will determine whether it becomes dominant, partial or transitional. Central among these is the trajectory of geopolitical tensions: if tensions remain chronic but manageable, risk aversion may persist without leading to a collapse in mobility, whereas escalation into acute crises could sharply suppress degree mobility altogether.

Equally important is the capacity of the European Union to protect and stabilise cohesion-oriented funding in a context of rising security expenditure, increasing fiscal pressures and economic uncertainty, and shifting political priorities at EU MS level and increasing frictions between EU countries. The scenario assumes that inclusion-oriented instruments are preserved and reframed as instruments of social cohesion, skills development and EU legitimacy. However, this preservation is uneven and differentiated across MS. The scenario also depends on selective EU MS's engagement towards mobility promotion. Its persistence requires that a critical mass of MS continue to support mobility costs instrumentally - where this aligns with domestic labour-market, institutional or social objectives, and where EU funding limits national fiscal exposure - despite frictions between EU MS. Furthermore, its persistence depends on the extent to which policymakers, particularly in sending countries, accept a situation in which inclusion improves without a corresponding improvement in balance, or choose to intervene more actively to counteract one-directional flows and emerging brain-drain dynamics.

The scenario is also contingent on how young people respond to prolonged uncertainty. Degree mobility remains viable only if a sufficient share of students, supported by partial public income substitution, are willing to engage in long-term mobility despite elevated risks. If risk aversion increases further or income

dependency intensifies, participation can shift towards domestic education or shorter, less risky mobility formats.

Finally, the role of digitalisation remains uncertain: digital tools may reinforce destination clustering by amplifying safety and reputational narratives or alternatively help stabilise confidence and sustain participation despite geopolitical tensions.

4.4.1.2. Scenario 2: Features, winners and losers, and conditions for occurrence

Features of intra-EU degree mobility and main benefits and challenges

Mobility patterns in this scenario are shaped by the following context features:

- *Geopolitical stabilisation reduces perceived risk of mobility and supports predictable cooperation between EU MS in higher education and other areas relevant for mobility* (e.g. social security coordination) as well as *continued national support for mobility within EU MS and regions, albeit differentiated* based on the extent to which it aligns to destination strategic social and economic goals. In this scenario, EU integration advances primarily through functional and operational domains (e.g. qualification recognition, social security coordination, admissions procedures and data interoperability), resulting into more aligned policy instruments and less fragmentation in higher education cooperation. While, these frameworks exist in other scenarios as well, in this one they function reliably and at a wide scale, reducing uncertainty to mobility. Furthermore, renewed EU integration also results in a *continued operationalisation of EU values through specific funding and institutional instruments*. For mobility, this implies specific funding and institutional support for top-ups, portability, targeted outreach and support systems for disadvantaged students. Additionally, national support for inclusive mobility continues and is increased in EU MS where this aligns with strategic needs. While levels of support are different across EU MS, the overall result is a *reduction of income-related risk*, making household financial capacity less decisive for participation in mobility.
- *Labour-market pull* for internationally educated graduates strengthens the *value proposition of degree mobility*. Additionally, *demographic decline in parts of the EU* increases the *incentive for some receiving countries to retain graduates*, making degree mobility a youth attraction strategy. Degree mobility continues to be closely linked to employment pathways, enhancing its perceived value but also reinforcing selective retention dynamics.
- *Digitalisation in education and beyond continues to increase*, acting as a *support factor* through the reduction of administrative barriers, reduction of information asymmetry and shaping destination narratives. For instance: AI admission matching tools, funding eligibility checkers, and real-time cost-of-living estimators reduce information asymmetry, especially valuable for lower-income students; peer networks and creator-led content broaden awareness beyond the classic “top” countries, supporting destination diversification, even though

algorithms can also reinforce popularity cascades if not counterbalanced by trusted public guidance.

In this context, intra-EU degree mobility is characterised by:

- *Continued support for collaboration in learning mobility*, including also the degree one. In a context of renewed EU integration and geopolitical stabilisation, EU and EU MS policy support for intra-EU degree mobility stabilises or increases resulting favouring strengthened collaboration among EU MS for degree recognition, interoperable qualification frameworks and better alignment between higher education and regulated professions across borders, development of European degree pilots in selected fields (especially those tied to strategic skills), maintenance without increase in English-taught courses, especially in countries where degree mobility aligns with strategic social and economic objectives; diffusion of digital credentials.
- *Some universities*, especially in contexts of high university autonomy, *strengthen institutional strategies for commercial valuing of mobility*. In a context of geopolitical stability and renewed EU integration, some universities expand transnational programmes, including joint European degrees. However, some institutions also pursue fee-based or prestige-oriented strategies, introducing additional forms of stratification within the system.
- *Participation expands beyond “elites”, increasing social diversity of mobility flows*. Degree mobility is no longer dominated by students from higher-income households. People with fewer opportunities increasingly enrol in full degrees abroad because the net cost becomes manageable and predictable (support packages cover not only tuition but also living costs).
- *Mobility flows increase without exploding*. Even in a “positive” scenario, overall degree mobility may grow only moderately because students’ preference for staying home (or using short/ blended mobility formats) remains significant.
- *More reciprocal mobility flows* between EU MS, even though *unbalances continue to persist*. Stabilised geopolitics and reinforced cooperation between EU MS reduce volatility and encourage more symmetric partnerships in learning mobility in higher education, with positive effects on increased reciprocal flows. However linguistic, reputational, and labour market “gravity forces” continue to pull many students towards a few highly attractive destinations. Additionally, while (formal or informal) social media communication may contribute to mitigating imbalances through promoting alternative destinations beyond the highly attractive ones, at the same time it can also reinforce popularity of top destinations if not counterbalanced. Therefore, **balanced mobility** improves in **some regions and disciplines**, but **imbalances** largely **persist**.

Mobility patterns in this scenario bring about gains and losses for specific actors:

Winners:

- people with fewer opportunities have biggest gain, as financial access to mobility expands, risk decreases, and support institutional systems for learning mobility improve.
- traditionally receiving destinations (e.g. employers, universities) which can count on increased talent youth arrival and retention, specifically in destinations foreseeing support systems for mobility and retention strategies. However, they are partial winners as housing pressure, capacity constraints and integration challenges persist especially when inflows surpass their capacity.
- destinations (countries/regions/cities) that position themselves as affordable, high-quality and high opportunities destinations, capturing flows previously concentrated in expensive hubs as long as inflows do not surpass their capacity in the housing, social security and labour market areas.
- universities in demographic decline destinations, which use degree mobility strategies to increase and diversify students' cohorts and mitigate enrolment drops as long as inflows do not overcome their educational and support capacity.

Losers:

- sending destinations (countries/regions/cities), especially those that are already facing brain drain, labour market shortages and demographic decline, which face structural risks especially in the context of attention to retention strategies in receiving destinations. However, they may be partial losers, as they may gain from financial remittances or of skills (returnees) and diaspora networks.
- higher education institutions unable to compete on reputation or support capacity, which struggle to benefit from increased mobility.
- nationalist political forces, as EU integration is fostered not only through cooperation among EU Member States, but also through young people's deeper understanding of the EU culture and social ties to other EU countries.

It also triggers (some) advantages and challenges for the achievement of EU targets. Advantages consist in the fact that EU inclusive **mobility targets** are **more achievable** thanks to reduced financial barriers (e.g. expanded financial support, portable aid) and lower administrative burden, which increase participation from under-represented groups. Achievability of overall mobility targets may also be favoured by predictable cooperation and stable frameworks in the area of degree recognition, digital credentials and streamlined admissions.

Nevertheless, degree mobility flows may increase only moderately as student preferences, language comfort and risk perceptions continue to limit demand for full degree mobility abroad. At the same time, achievement of mobility targets may differ from one EU MS to another. While a stable geopolitical context and better information broaden the range of destinations considered viable, supporting destination diversification, achieving **balanced mobility** remains **challenging**. Structural differences in labour-market opportunities, the strong

attractiveness of high-reputation destinations, and retention policies in receiving countries can sustain asymmetric flows. Additionally, **new forms of stratification can emerge** through programme prestige, city-level costs or unequal access to high-quality internships. As a result, this scenario supports more inclusive participation but does not automatically guarantee achievement of overall mobility targets and especially their balance across EU MS.

Main conditions for the occurrence of this scenario

While this scenario aligns with several current trajectories (e.g. focus on inclusivity of mobility, consolidation of European Universities alliances as stable infrastructures for joint degrees and smoother recognition, enhanced focus on digital credentials and data interoperability, labour-market demand for graduates with international and cross-cultural skills), its occurrence depends on a set of critical uncertainties, whose evolution will determine whether it will become dominant, partial or transitional. Key among these are: i) whether coordination between EU frameworks and national implementation, is effective, guaranteeing support mechanisms that keep pace with real and rising costs of living; ii) whether reforms in higher education (e.g. automatic recognition of qualifications) become sufficiently implemented in practice and trusted; iii) whether EU and national actors accept that mobility can generate net gains at EU level while producing uneven and politically sensitive outcomes at national and regional level; iv) whether student preferences shift towards full-degree mobility rather than short/blended international pathways. The scenario is also shaped by policy choices in receiving countries, notably whether they prioritise graduate circulation over retention, and by how digital and AI-based tools are governed - either reducing information asymmetries and supporting informed choice or reinforcing concentration and inequality through opaque or biased guidance.

4.4.1.3. Scenario 3: Features, winners and losers, and conditions for occurrence

Features of intra-EU degree mobility and main benefits and challenges

In this scenario, intra-EU degree mobility is shaped by the following context conditions:

- *Geopolitical instability and political tensions between EU MS*, which reduce support for EU integration, undermine trust and long-term cooperation between EU MS and enhance nationalist political movements. Additionally, security agendas gain relevance. In this context, policy support for degree mobility stagnates or is reduced, as EU MS prioritise domestic system stability and political risk management over transnational mobility ambitions.
- *Financial inequalities deepen* following economic uncertainty in the context of geopolitical instability and tensions between EU MS. Furthermore, in the context of weakened EU integration and enhanced nationalist movements, access to student employment for mobile students is not sustained across all EU countries, reinforcing socio-economic selectivity.
- *Digital technologies*, online programmes and hybrid degrees *expand*, but they *do not automatically ensure democratisation and inclusivity*, including also in the educational field, as digital stratification continues

to persist and labour-market hierarchies continue to favour in-person mobility and local networks.

In this context, intra-EU degree mobility in higher education is characterised by:

- *Lower mobility volumes.* As mobility becomes a privilege favouring certain cohorts of students, overall mobility across EU MS diminishes. Furthermore, mobility flows are also reduced by a risk driven behaviour of students and policymakers' focus on domestic stability over EU mobility. Students' decisions prioritise predictability, safety and access to income over academic prestige, long-term integration or cosmopolitan experience. Additionally, as EU integration weakens and policy support to mobility stagnates or is reduced, mobility targets are not abolished, but deprioritised. Policymakers prioritise domestic system stability, fiscal control and political risk management over mobility expansion.
- *"Domestic first, mobility second" logic dominates university strategies.* Universities focus on securing enrolment at home. Degree mobility is no longer a core mission, but an optional and often marginal activity, concentrated in a limited number of programmes and partnerships.
- *Strong socio-economic stratification of mobility flows.* Degree mobility is dominated by students from households with access to financial resources. High costs, lack of grants, and exposure to regulatory and geopolitical shocks exclude people with fewer opportunities. Additionally, financial stress increases drop-out risk and further discourages participation of disadvantaged groups. Moreover, risk tolerance becomes a key stratification alongside income, further reducing mobility flows.
- *Selective reconfiguration of mobility geographies.* Many traditionally attractive destinations remain appealing where they are also perceived as safe and predictable. However, exposure to geopolitical tensions, cyber or hybrid threats, political volatility or abrupt regulatory change reduces the attractiveness of some well-established mobility destinations. In parallel, certain countries or regions (e.g. Spain, Portugal, Italy) experience stabilisation of outflows or modest inflows, not because of major improvements in academic prestige or labour-market opportunities, but because they are perceived as lower-risk environments. These shifts remain episodic, uneven and benefit primarily resource-rich, risk-averse students, rather than producing inclusive or balanced mobility. Overall, **mobility flows become non-linear, episodic and unpredictable**, further **weakening** prospects for **balanced mobility**.

Mobility patterns in this scenario bring about gains and losses for specific actors:

- *Winners:* students from high socio-economic backgrounds who can tolerate risks; selected universities and destinations perceived as safe as long as inflows do not surpass their educational capacity; countries/regions benefiting from risk-induced stabilisation of enrolments.

- **Losers:** people with fewer opportunities, largely excluded from degree mobility; destinations and universities perceived as unsafe; peripheral regions lacking visibility or resources to attract students despite being potentially secure.

It also triggers limited advantages and several challenges for the achievement of EU targets. The main advantage consists in the fact that reduced outflows in some countries/regions temporarily stabilise domestic systems. Challenges refer instead to the fact that both overall mobility and inclusive mobility targets are not achievable, as mobility flows diminish and their composition is limited to students with high access to financial resources. Furthermore, balanced mobility improves only incidentally and unevenly, driven by risk-avoidance students' behaviour rather than policy design. Weakened EU integration undermines the credibility and legitimacy of common mobility objectives.

Main conditions for the occurrence of this scenario

While this scenario is supported by a convergence of current trends (e.g. rising costs of living, particularly of housing in major cities, increasing reliance on family co-financing, and, hence, reducing diversity of long-term mobility flows as the degree one, housing shortages, administrative and welfare complexity, and dependence on student employment with language and network requirements acting as powerful exclusion mechanisms, students' risk aversion to moving abroad especially in countries with good economic prospects, diffusion of short-term or blended mobility formats), its occurrence depends on several key uncertainties whose evolution make this scenario dominant, partial or transitional. These include:

- i) the depth, duration and uneven distribution across EU MS of geopolitical tensions.
- ii) the persistence or increase of living costs and weak student support systems.
- iii) the extent to which policymakers respond proactively to emerging exclusion and imbalance or accept elite-only mobility as a stabilising outcome.
- iv) shifts in students' risk tolerance and preferences, coupled with employer valuation of online and hybrid degrees and domestic experience only.

Overall, this scenario occurrence depends on whether geopolitical uncertainty and financial exclusion are managed defensively by EU MS rather than countered through deliberate policy design.

4.4.1.4. Scenario 4: Features, winners and losers, and conditions for occurrence

Features of intra-EU degree mobility and main benefits and challenges

In this scenario, mobility patterns are shaped by the following context features:

- *A stable geopolitical context and functioning EU framework* limit crisis-driven volatility. However, policymakers see limited electoral or political gain in expanding redistributive mobility support. Resources are channelled instead towards competitiveness, innovation, defence or

climate priorities. Thus, financial barriers remain impactful not due to opposition, but due to deprioritisation.

- *Costs of living remain high*, representing a primary barrier to mobility particularly in major academic and metropolitan hubs. Deprioritisation of inclusivity and equity means that their impact on mobility is not mitigated by redistributive policies, reinforcing socio-economic selectivity even in a geopolitical stable context.
- *Digitalisation continues*, including also in higher education. However, digitalisation improves the performance of the education system without ensuring its inclusivity. As digital stratification continues, digital tools alone do not guarantee equal opportunities for students with fewer economic opportunities.

In this context, intra-EU degree mobility is characterised by:

- Progress in policy support for mobility is incremental rather than radically transformative, reinforcing a **mobility** system that is **predictable** and **cooperative**, yet **socially** and **professionally segmented**. Geopolitical stabilisation and restored trust enable smoother recognition of qualifications processes, improved administrative cooperation, increased digital credentials, interoperable databases and streamlined admissions, reducing administrative and regulatory barriers to mobility. However, deeper reforms, such as, for instance, the harmonisation of aid portability systems, the establishment of fully operational EU diploma and the broad opening of regulated professions remain politically sensitive and largely unimplemented, as such measures directly affect labour-market access, challenge nationally embedded professional standards and imply long-term fiscal commitments. Additionally, it does not target specifically equity and inclusivity of degree mobility. As a result, progress in mobility policy support is confined to specific initiatives rather than to the transformation of the whole system and to its inclusivity.
- *University institutional strategies for moderate commercialisation of mobility*. Universities operate in a reliable political and institutional environment and expand international activities selectively, often prioritising programmes, partnerships and student profiles that enhance reputation or financial sustainability. This reinforces stratification within mobility, even as cooperation frameworks function smoothly.
- *Moderate increase in mobility flows*. Degree mobility recovers from periods of instability and grows steadily, but not expansively. Long-term planning of degree mobility is possible again, primarily for learners able to afford it. However, this growth reflects a return to predictability rather than an expansion of access. Participation remains concentrated in specific institutions, cities, disciplines and socio-economic groups, with overall volumes shaped by affordability constraints rather than by policy-driven widening of participation.

- *Socio-economic selectivity of mobility flows remains structural.* High living costs, limited grants and weakly portability of aid ensure that degree mobility remains dominated by students from higher socio-economic backgrounds, while students with fewer financial resources remain underrepresented.
- *Degree mobility is framed as career optimisation.* Degree mobility is widely framed as a strategic choice linked employability, network building and access to high-status labour markets, rather than as a broadly accessible educational right.
- *Apparent balance of degree mobility achieved through limited participation.* Geopolitical stabilisation reduces volatility and enables more predictable circulation among mobile students. Sending and receiving roles become more predictable, and return or onward mobility increases, because mobile students are typically well-resourced and do not rely on mobility to escape economic precarity. Therefore, more balanced flows emerge not because access is widespread, but because mobility involves a smaller, highly mobile elite that circulates efficiently.

Mobility patterns in this scenario bring about **gains and losses for specific actors**:

- *Winners:* students from higher socio-economic backgrounds who can invest in long-term degree mobility and benefit from stable returns; destinations and universities with strong academic reputation.
- *Losers:* students with fewer economic opportunities excluded from degree mobility despite geopolitical stability; destinations and universities which struggle to attract mobile students or benefit from circulation.

It also triggers **limited advantages and several challenges for the achievement of EU targets**. Advantages consist in more stable and predictable students' circulation, enabling some progress on balanced mobility at aggregated level. However, there are several challenges to be considered: overall mobility targets are more difficult to reach, despite moderate increase, as mobility is not accessible to all potential beneficiaries; inclusive mobility targets are not met, as mobility reproduces social-economic stratification; political legitimacy risks regarding mobility support emerge as mobility benefits appear concentrated among the privileged, undermining the credibility of EU mobility objectives.

Main conditions for the occurrence of this scenario

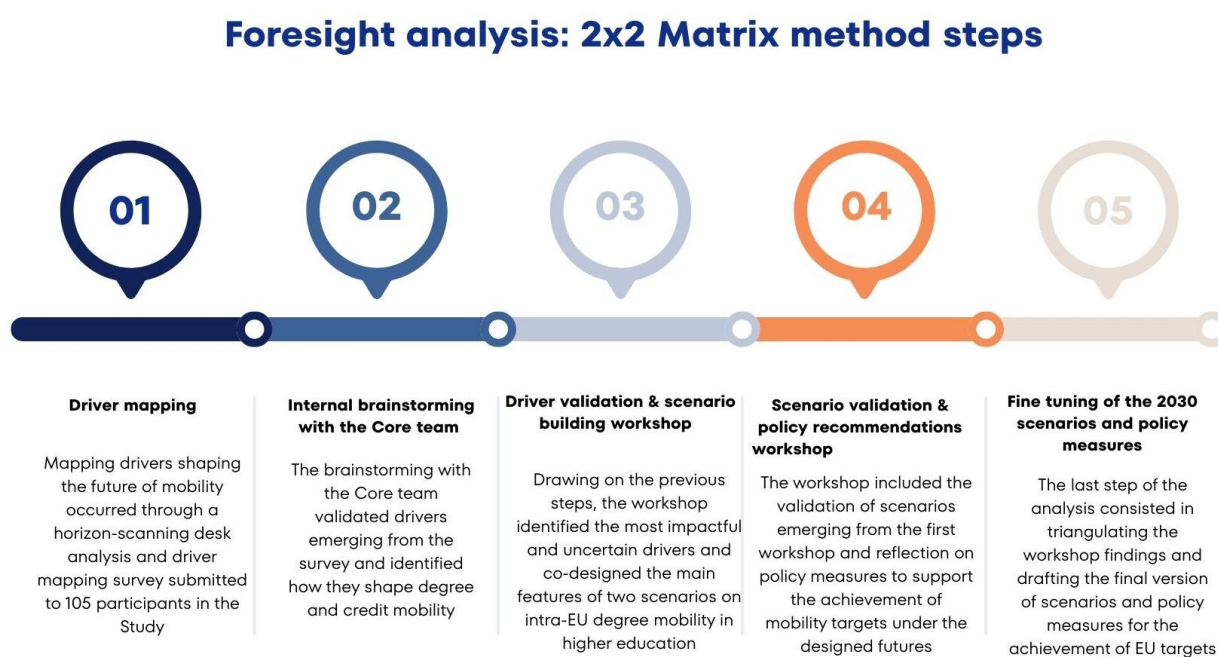
While this scenario is supported by current trajectories in mobility (e.g. long-standing cooperation frameworks, such as the Bologna Process, Erasmus+ and European Universities alliances, continue to provide predictable infrastructures for recognition, quality assurance and administrative coordination, enabling smoother circulation of students; financial conditions are highly impactful, reinforcing selective access), its materialisation depends on a set of key uncertainties. These include: i) whether EU and national policymakers continue to deprioritise redistributive mobility support once stability is restored; ii) the depth of functional (but not social) integration in recognition frameworks and joint degrees, especially in regulated professions; iii) the evolution of labour-market

dynamics and demographic pressures; iv) and the impact of public narratives framing mobility as an individual opportunity rather than a collective right. These factors determine whether EU consolidates a stable yet stratified mobility system or shifts toward a more inclusive pathway by 2030 (i.e. scenario 2).

4.5. Foresight analysis methodology

In line with the approach proposed in the Inception report, the foresight analysis uses a **2x2 Matrix method** with the aim to develop a set of contrasting futures on intra-EU degree mobility in higher education by 2030.

Figure 30: Foresight analysis 2x2 method steps.



Source: study team.

The **key elements** of this method are:

1. A focal issue of the foresight analysis: balanced⁴¹¹ and inclusive⁴¹² intra-EU degree mobility⁴¹³ in higher education by 2030

While the approach presented in the inception report referred to balanced and inclusive mobility in higher education in general, the study tasks have shown that push and pull factors shape credit and degree mobility differently, and that degree mobility raises particularly significant challenges for higher education systems across EU Member States. As discussed in the report, intra-EU mobility patterns are not evenly distributed, but are characterised by persistent asymmetries across countries and regions, including East-West and South-North dynamics

⁴¹¹ Balanced mobility refers to sustainable equilibrium between incoming and outgoing mobility from the point of view of the overall distribution of costs and benefits of mobility.

⁴¹² Inclusive mobility consists in ensuring that students/academics with fewer opportunities have similar chances of participating in mobility as the average student.

⁴¹³ Degree mobility refers to students enrolling as regular students in a programme in the destination country, with the intention to graduate there.

(see section 2.1.2 in the main part of the report). The report also points to different mobility system types across the EU, with some countries functioning as highly attractive destinations and others experiencing more limited or outward-oriented mobility patterns (see section 2.1.1.). In this context, degree mobility is especially relevant because of its longer-term effects on both sending and receiving systems, including its links to graduate retention, talent concentration, skill shortages and uneven territorial development

The report (see in particular section 2.1.2.1) further shows that balanced intra-EU mobility has become politically salient in current European policy discussions. Recent EU and Bologna-level policy documents, including the 2024 Council Recommendation *Europe on the Move* and the 2024 Tirana Communiqué, explicitly refer to the need to better understand the challenges and impacts of balanced mobility. This reflects concerns that structurally uneven degree mobility may reinforce patterns of brain gain and brain drain within the EU, creating pressures both for receiving systems, such as housing, capacity and financing pressures, and for sending systems, such as talent loss and low return rates. Thus, while the driver mapping focused on both credit and degree mobility, the co-design of scenarios for balanced and inclusive mobility in higher education by 2030 and the related policy recommendations focus explicitly on degree mobility in order to ground the analysis in one of the core challenges currently facing EU higher education systems.

2. Time horizon: the time horizon used in the current foresight analysis is 2030. Even though generally scenarios assume a longer period of time, this time horizon has been selected to align it with the time horizon foreseen by the European Commission for the achievement of mobility targets.
3. A set of prioritised drivers⁴¹⁴. This set of prioritised drivers follows from a driver mapping and prioritisation process, including the following steps:
 - A **horizon scanning oriented desk analysis** to identify a **long set of drivers**. The desk analysis focused on the literature mapped in the Intermediary report, the country reports produced within the project, the thematic case studies and additional literature on higher education and mobility. The main output of this phase consists in a long list of drivers shaping balanced and inclusive mobility in higher education categorised according to the PESTELV (Political, Economic, Social, Technological, Environmental, Legal and Values) framework.

⁴¹⁴ Drivers consist in underlying forces that shape or influence trends and determine the plausible trajectories of future developments. Drivers can operate at micro or macro levels and can act as push (i.e. conditions in a student's country of origin that encourage or influence the decision to study abroad) or pull (i.e. characteristics of destination countries that attract international students) factors.

Long list of drivers grouped around the PESTELV categories

Social drivers: covers demographic, cultural, and behavioural changes that influence how individuals and societies engage with education and mobility:

- Household financial conditions
- Student employment dependency (i.e. reliance on paid work to cover the costs of higher education)
- Family and caregiving responsibilities
- Availability of child/family-friendly facilities in the origin and selected destination
- Language skills and quality of language education in origin countries and host societies
- Students' mental-health and well-being conditions
- Mental health and psychosocial support availability in the selected destination/institution
- Housing availability and affordability in the selected destination
- Quality of life and safety in the origin and selected destination
- Social infrastructure (e.g. housing, health and social services) pressure from incoming flows
- Demographic changes in the origin and selected destination
- Widening social and economic inequalities between EU/EEA countries and social groups
- Gender balance and inclusivity climate and services at host institutions/country
- Peer, family, and community support for international learning
- Geographic proximity between home and destination
- Urban–rural connectivity and transport accessibility in selected destinations
- Diaspora and alumni network influence
- Student identity and agency transformation (i.e. evolution of how students perceive their role as learners and workers)

Economic drivers include economic conditions and trends that affect students', academics and institutions' capacity to engage in mobility:

- Post-graduation employment opportunities and conditions in the origin and selected destination
- Labour-market demand for graduates with international experience
- Alignment between education offer and labour market prospects in origin and selected destination
- Economic return and tax/returnee incentives for graduates
- Tuition fee regimes for international students (EU/EEA/Third country)
- Scholarship and grant availability for incoming and outgoing students
- Intensifying competition between EU/EEA countries and/or EU–ASEAN–Africa–US–Australia blocs for international students and revenue diversification
- Financialisation of higher education systems (i.e. dependency on tuition income, private financing, and commercial partnerships)
- Cost of living (housing, transport, food, etc.) in selected destinations

- Cross-border portability of grants, loans and other benefits/incentives
- Economic inclusion (e.g. financial benefits, affordable loans) for people with fewer opportunities
- Regional economic disparities and underfunded territories

Technological drivers cover technological progress and digital integration that enable or transform mobility:

- Digital readiness of higher education institutions (e.g. digital infrastructure, online and hybrid courses, staff digital competence, digital administrative procedures)
- Adoption of fair, transparent and non-biased artificial intelligence systems in admissions, matching, and support services
- Immersive and extended reality (e.g. AR/VR/metaverse environments) technologies in learning mobility
- Digital/AI driven education (dominance of tech giants mediating education, self-sovereign learning records replacing degrees, etc.)
- Digitalisation of credit recognition
- Interoperability of digital tools across countries (e.g. European Student Card) and data protection/safety frameworks
- Availability of virtual and/or blended mobility options
- Development of joint digital mobility centres within Universities alliances
- Accessibility technologies for students with disabilities and economically vulnerable
- Digital skills among the potentially mobile population
- Influence of social media and/or digital peer communities on mobility choices
- Technological inequality and digital divide between and within EU/EEA countries

Environmental/Ecological drivers refer to environmental factors and sustainability issues affecting learning mobility:

- Sustainability orientation of mobility policy
- Green-mobility incentives and carbon-neutral travel options
- Environmental quality and sustainability of origin and selected destinations
- Environmental pressures linked to territorial concentration of students' inflows
- Climate-driven migration and educational displacement (i.e. mobility caused by climate impacts on regions, not just voluntary exchange)

Political/regulatory/legal refer to government actions, public policies, laws, regulations, institutional frameworks and international agreements that shape higher education and mobility systems:

- Specific national/regional internationalisation strategies promoting mobility, dedicated structures and funding
- Promotion of intergenerational mobility that allows several family members to go on mobility together
- Specific frameworks for distributing mobility across different territories (e.g. urban-rural; small-big cities) and/or courses (STEM, humanities, etc.)
- Migration-for-skills strategies and/or regional and local economic development strategies linked to talent attraction/retention
- Programme caps/quotas and selectivity rules for non-nationals

- Regulation of English-taught programmes (e.g. limitation/expansion of EN programmes)
- Availability of diverse and flexible mobility (e.g. short-term, internships)
- Automatic recognition of qualifications and study outcomes in origin and selected destinations
- Harmonised EU learning transferability and transparency tools (e.g. ECTS, ECAVET, EQF, joint European Degree) and development of micro-credentials
- Participation in Universities alliances and/or other cross-border/transnational partnerships
- International university branches located abroad
- University funding linked to balanced incoming and outgoing mobility
- Access to information and mobility counselling at HEIs
- Institutional capacity to identify and support vulnerable groups in outgoing/incoming mobility
- Monitoring and enforcement of mobility targets, including inclusive mobility
- Higher education capacity and quality in the origin and selected destination
- Inequalities in higher education funding among EU/EEA countries
- Public administration efficiency (bureaucratic burden, digitalisation, transparency) in the origin and selected destination
- Visa and residence policies for foreign students in selected destinations
- Post-study work rights and stay permits for foreign students in selected destinations
- Backsliding of democracy, rise of illiberal movements and limitation to academic freedom
- Geopolitical conditions (e.g. Brexit, international wars and tensions, future enlargement of the EU)

Value-based drivers include shared cultural, ethical, and normative dimensions that influence decisions, perceptions, and social acceptance of change:

- Trust in science and education institutions (i.e. societal confidence in universities as reliable sources of knowledge)
- Societal value placed on international education
- Academic nationalism vs globalism (i.e. tension between national priorities and global academic cooperation values)
- Perceived prestige of universities, including also their ethical and transparency reputation
- Cultural openness and tolerance toward foreigners
- Motivation and attitudes towards studying abroad (e.g. global/EU citizenship orientation)
- Intercultural interaction between domestic and international students

- A survey for the prioritisation of previously mentioned drivers** by their **level of impact** on the future of higher education mobility by 2030 and by their **level of uncertainty** in their development over the next 5 years. Moreover, the survey also aimed to surface

additional drivers besides those included in the previously mentioned long list. The survey was submitted through an online anonymous questionnaire to 105 participants in the study, including National contact points, country researchers and experts involved in thematic case studies. Out of 105 people, 53 replied to the survey. However, 11 of the answers received were incomplete and, hence, eliminated from the analysis. The figures below illustrate on the one hand the highest impactful and uncertain drivers emerging from the survey and those with the lowest level of impact and uncertainty the future of mobility in higher education by 2030. It is important to note that environmental/ecological drivers have not been considered in the next phases of the foresight analysis as none of them has been prioritised as medium/highly impactful drivers.

- ii. An ***internal brainstorming targeted to the Study Core team*** members with the aim to validate the prioritised drivers emerged from the survey and to assess whether they shape differently credit and degree mobility. Following the brainstorming with the Core team, the highest-rated drivers were grouped according to their influence on credit or degree mobility. The drivers identified as both highly impactful and highly uncertain were then combined with additional medium- to highly rated drivers that the Core team considered relevant for both credit and degree mobility. Table below presents the most impactful and uncertain drivers categorised by their influence on credit or degree mobility. Additionally, the internal Core team brainstorming also surfaced the need to focus the scenario building process on intra-EU degree mobility for the reasons explained previously.

4. ***A drivers' validation and scenario co-design workshop*** targeted to the participants involved in the survey. The workshop involved the same participants targeted by the survey to enhance the credibility and validity of the foresight analysis. Overall, **34 stakeholders and country experts** – representing ministries, Erasmus + agencies, consultancy, universities or research centres and Education/research/mobility agencies – from **23 EU countries** took part in the workshop.
5. Besides validating the list of drivers emerging from the survey and the internal Core team brainstorming, participants were also called to identify the most impactful and the most uncertain driver for degree mobility among those prioritised in the previous phases. Following the 2x2 Matrix method, participants were asked to select two
6. Independent drivers. As illustrated in the figures below, **financial household conditions** were identified as the **most impactful driver**, while **geopolitical conditions** as the **most uncertain one**.

7. **Two different outcomes for highly impactful and highly uncertain drivers.** These refer to different ways in which a certain driver may manifest in the future. As a driver may have multiple interpretations, it is important to explore different development and identify those that may be better suited for creating contrasting scenarios. The opposed outcomes of critical uncertainties represent the main axes of the scenarios. Within the workshop two opposed effects were identified for both the most impactful and uncertain drivers, as illustrated in the figure below. These effects were further fine-tuned in the drafting of the scenario narrative.
8. **Scenario narratives.** Based on the combination of the different outcomes identified previously, scenarios narratives were built, corresponding to the four quadrants of the 2x2 matrix. The main elements of two of the four contrasting scenarios (i.e. the most “positive” – scenario 2 – and the most “negative” – scenario 3) were co-designed with participants in the first workshop. The remaining scenarios were drafted by the foresight team, taking into consideration the main trends emerging from the overall analysis of country reports and the literature analysed previously. When developing scenarios narratives, attention was paid to the main features of scenarios:
- **“Plausibility:** The scenarios must be plausible, this means that they must fall within the limits of what might conceivably happen.
 - **Consistency:** The logic must be consistent so that the scenario seems credible.
 - **Decision making utility:** Each scenario should contribute specific insights into the future that will generate further insights for the focal issue.
 - **Challenge:** The scenarios should challenge conventional wisdom and business-as-usual thinking about the future⁴¹⁵.”

All four **contrasting scenarios were validated** through the workshop **“Validating scenarios and co-designing policy recommendations”**. The workshop was targeted to participants in the first workshop to enhance validity of the foresight analysis. The second workshop involved 21 participants from 17 EU countries, most of whom participated in the previous workshop.

⁴¹⁵ Source: Save the Children UK and School of International Futures (2019) The future is ours. Strategic Foresight toolkit –making better decisions, <https://resourcecentre.savethechildren.net/document/future-ours-strategic-foresight-toolkit-making-better-decisions>

Figure 31: Drivers prioritised by their level of impact on balanced and inclusive mobility in higher education on the basis of your survey and internal brainstorming?

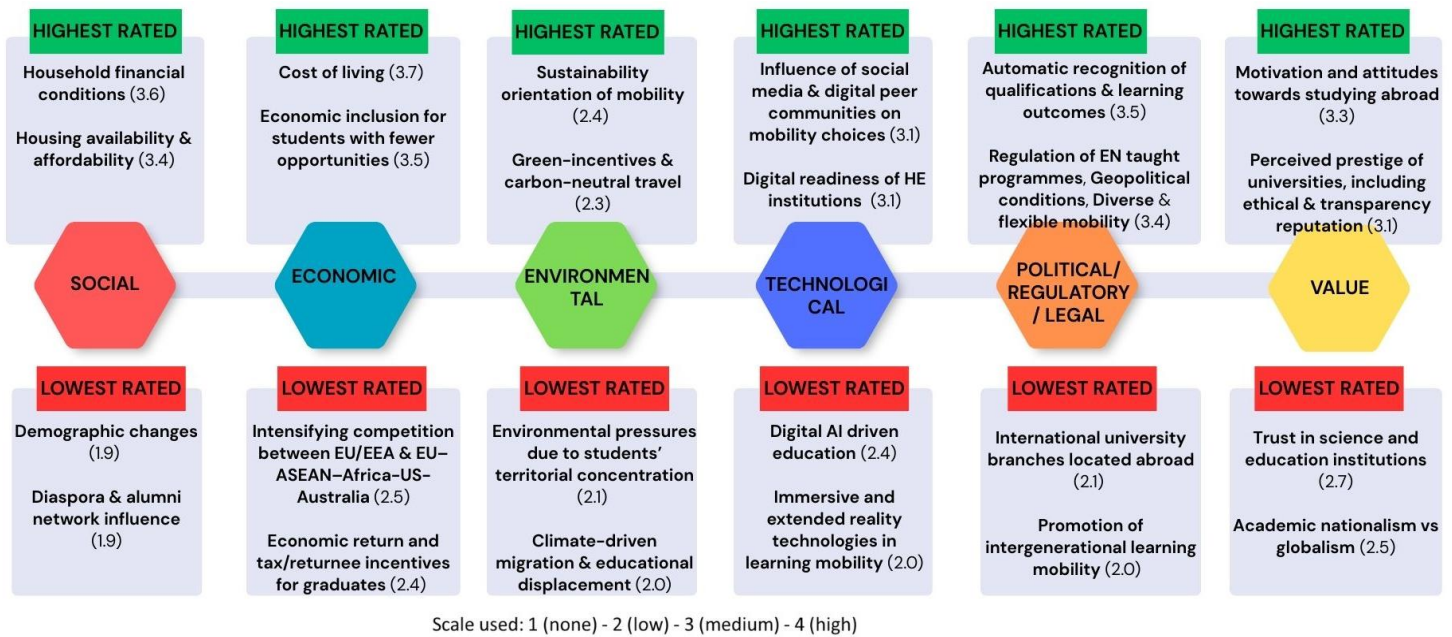


Figure 32: Drivers prioritised by their level of uncertainty

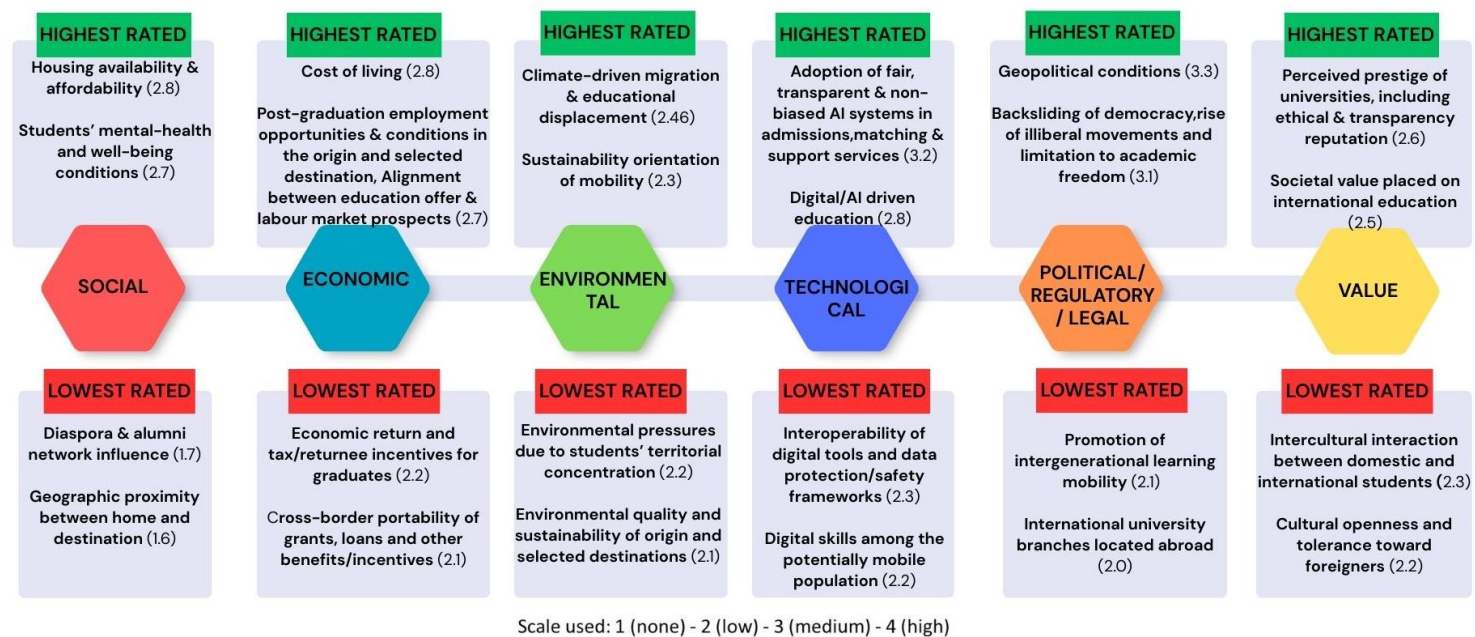


Table 12: Most impactful and uncertain drivers shaping credit and degree mobility in higher education

PESTEL domain	Type of mobility (credit and/or degree) to which they apply	Most two impactful drivers	Most uncertain two drivers
Social	Credit & degree	Housing availability and affordability in the selected destination	Housing availability and affordability in the selected destination
	Degree	Household financial conditions	Students' mental health & well-being
	Credit	Student employment dependency	
Economic	Credit & degree	Cost of living in selected destinations	Cost of living in selected destinations
		Economic inclusion for students with fewer opportunities	
	Degree		Post-graduation employment opportunities and conditions in the origin and selected destination
	Credit		Alignment between education offer and labour market prospects in origin and selected destination
Technological	Credit & degree	Influence of social media and/or digital peer communities on mobility choices	Adoption of fair, transparent and non-biased artificial intelligence systems in admissions, matching, and support services
		Digital readiness of higher education institutions	Digital/AI driven education
		Accessibility technologies for students with disabilities and economically vulnerable	
	Credit	Availability of virtual and/or blended mobility options	
Political, Regulatory, Legal	Credit & degree	Geopolitical conditions	Geopolitical conditions
	Degree	Automatic recognition of qualifications and learning outcomes in origin and selected destinations	Backsliding of democracy, rise of illiberal movements and limitation to academic freedom
		Regulation of English-taught programmes	
Value-based	Credit & degree	Availability of diverse and flexible mobility	
		Motivation and attitude towards studying abroad	
	Degree	Cultural openness and tolerance toward foreigners	
		Perceived prestige of universities, including ethical and transparency reputation	Perceived prestige of universities, including also their ethical and transparency reputation

Annex 4. Mapping of country-level economic/Cost-Benefit Analysis of international degree mobility

Table 13: Country-level analyses of costs and benefits of incoming degree mobility (host-country perspective).

Country	Economic/CBA analysis in past ~10 years?	Key findings (summary)	Net impact of incoming degree mobility
Austria	Yes (economic impact; not full CBA)	IHS (2022) estimates consumption-driven effects of international degree students using MRIO for 2009/2011/2015/2019. In 2019, student consumption generated €715.1m GVA, supported ~8,700 jobs (~6,900 FTEs), and yielded ~€292m in taxes and social contributions. No comparison with total HE provisions costs or lifecycle net returns ⁴¹⁶ .	- Not assessed (gross impact only)
Belgium (Flanders / FWB)	Yes (CBA in Flanders)	Flanders CBA: €2.4–€3.1 benefits per €1 invested; retention critical; no negative peer effects. FWB highlights high costs in regulated professions (e.g. medicine) and retention tensions ⁴¹⁷ .	✓ Net positive
Bulgaria	No	No available studies or assessments identified.	- No study
Croatia	No	No available studies or assessments identified.	- No study
Cyprus	No	No dedicated national assessment: benefits framed qualitatively (internationalisation, networks), with limited empirical economic evidence.	- No study
Czechia	No	No dedicated CEA/CBA identified; research focuses on mobility patterns and outcomes.	- No study
Denmark	Yes (fiscal-return focus)	2018 study: 42% remain after 2 years; around one-third employed; ~30% positive lifetime contribution vs ~70% net fiscal burden (before SU and education costs). EU student support costs are monitored ⁴¹⁸ .	✗ Net negative
Estonia	Yes (economic impact; institutional cost concerns)	International students and graduates contributed ~€23m in taxes (2023/24). In 2023/2024, international students contributed €5.4 million in income tax and €10.3 million in social tax, amounting to a total tax contribution of €15.7 million ⁴¹⁹ . Separate evidence suggests tuition income often does not cover programme costs in public universities.	- Not assessed (gross impact only)
Finland	Yes (net public-finance + economic impact)	Education exports ~€1bn value added (2019); net public-economy value €81m (2019–2020). Net tuition income €14.2m. Long-term outcomes depend on post-graduation retention ⁴²⁰ .	✓ Net positive
France	Yes (net contribution estimate)	Campus France: €5bn student spending vs €3.7bn public costs, yielding net +€1.35bn. High first-year bachelor dropout (~50%) noted ⁴²¹ .	✓ Net positive
Germany	Yes (lifecycle fiscal returns)	Net public returns per 1,000 entrants €93.3m–€329.8m depending on stay rates; benefits include skills, demographics, and innovation ⁴²² .	✓ Net positive
Greece	Not applicable (host incoming focus)	Mapping addresses brain-drain and outgoing mobility costs rather than host-country incoming degree mobility.	N/A
Hungary	Yes (economic impact)	Consumption-based modelling (2019/20): HUF 213bn output; HUF 124bn GVA; ~20,000 jobs supported. Cost side not identified ⁴²³ .	- Not assessed (gross impact only)

⁴¹⁶ Institute for Advanced Studies (IHS) (2022), *Macroeconomic Effects of International Skilled Workers on Austria as a Business, Research and Labour Location*, Vienna, Chapter 5, available at: <https://irihs.ihs.ac.at/id/eprint/6274/7/ihs-report-2022-schnabl-et-al-effekte-von-internationalen-fachkraeften-oesterreich.pdf>

⁴¹⁷ De Witte, Kristof. (2021). Do international classes pay off? A cost-benefit analysis of the internationalisation of higher education in Flanders Do international classes pay off? A cost-benefit analysis of the internationalisation of higher education in Flanders.

⁴¹⁸ Ministry of Education and Research [Justering af engelsksprogede uddannelser](#), 2018

⁴¹⁹ <https://www.stat.ee/en/find-statistics/experimental-statistics/analysis-economic-impact-international-students>

⁴²⁰ Finnish National Agency for Education (EDUFI), *Selvitys suomalaisen koulutusviennin taloudellisesta arvosta* [Study on the economic value of Finnish education exports], Helsinki, 2022. Available at: https://www.oph.fi/sites/default/files/documents/Selvitys_suomalaisen_koulutusviennin_taloudellisesta_arvosta_0.pdf

⁴²¹ <https://www.campusfrance.org/fr/les-etudiants-internationaux-un-apport-de-5-milliards-d-euros-a-l-economie-francaise> and <https://rapportactivite2022.campusfrance.org/analyser/135-milliard-deuros-leconomie-francaise>

⁴²² Geis-Thöne, W., Obst, T., Plünnecke, A., & Betz, J. (2025). *Volkswirtschaftliche Effekte der Zuwanderung über die Hochschulen: Auswirkungen auf öffentliche Haushalte und Wertschöpfung in Deutschland*.

⁴²³ Alpek, L et al: *Impacts of the international students' consumption expenditures on the national economy in Hungary, 2020, Regional Statistics, Vol. 12. No. 4. 2022: 176–199; DOI: 10.15196/RS120408*

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Country	Economic/CBA analysis in past ~10 years?	Key findings (summary)	Net impact of incoming degree mobility
Iceland	No	Evidence relates mainly to return of Icelandic outbound students; no host-country CBA.	- No study
Ireland	Yes (CBA-style within broader strategy review)	International education sector ~€2.38bn/year; reported short-term benefit–cost ratio 1.67. Not limited to degree mobility only ⁴²⁴ .	✓ Net positive
Italy	Yes (economic impact; not CBA)	International degree students' spending generates ~€700–750m per year; includes indirect and induced effects; no formal public-cost comparison ⁴²⁵ .	- Not assessed (gross impact only)
Latvia	Yes (economic impact)	Higher education exports €385m/year (~0.92% GDP); average spend €15,780/year; tax income €58.1m; low stay rate (~5% ⁴²⁶).	- Not assessed (gross impact only)
Lithuania	Yes (CBA / net benefit estimate)	Annual contribution ~€86.7m; net benefit ~€72.9m after stipends; based on survey and modelling (2022–23) ⁴²⁷ .	✓ Net positive
Luxembourg	No	No national study: ~70% remain for first job; costs of support services acknowledged.	- No study
Malta	No	No CBA; limited data on employment and retention; benefits described qualitatively.	- No study
Netherlands	Yes (CBA/fiscal studies)	CPB 2019: ~€7,300 per student/year (later estimates higher). Debate highlights budget, quality, and housing pressures; stay rates ~24–25% after 5 years ⁴²⁸ .	✓ Net positive
Norway	No	No formal CBA; policy discussion notes barriers to retention; many non-EU graduates leave within a few years.	- No study
Poland	Not applicable (host incoming focus)	Evidence focuses on wage premiums for Polish outbound mobility rather than host-country incoming degree mobility.	N/A
Portugal	Partial (qualitative/regional)	No formal CBA: qualitative evidence highlights local spending and demographic/social benefits in rural regions ⁴²⁹ .	- Not assessed (gross impact only)
Romania	No	No comprehensive CBA: notes host-side benefits and challenges such as limited retention and weak tracking.	- No study
Slovakia	Not applicable (brain-drain focus)	Mapping cites brain-drain loss per emigrant; not an incoming-host degree mobility analysis.	N/A
Slovenia	Partial/Programme-level (Erasmus+)	Erasmus+ mobility impact: ~€3.1m fiscal returns and ~194 jobs (2018); effects concentrated in university cities ⁴³⁰ .	- Not assessed (gross impact only)
Spain	Yes (economic impact)	Output €3.8bn (2018–19) and ~€6.3bn (2022–23, broader population); multiplier ~2.27–2.28; master's programmes largest share ⁴³¹ .	- Not assessed (gross impact only)

⁴²⁴ Based on an independent review of Ireland's *International Education Strategy 2016–2020* by Indecon. The study was not limited to tertiary education (though it was its main component), as other formal and non-formal education, notably English-language courses, were also considered.

⁴²⁵ Uni-Italia (Commissioned by the Ministry of University and Research and other Ministries) and Bocconi University, *International Students in Italy: Main Features and Economic Impact – Survey 2023* (Uni-Italia, 2024), available at <https://uni-italia.it/wp-content/uploads/2024/05/International-Students-in-Italy-main-features-and-economic-impact.pdf>

⁴²⁶ Rīga Stradiņš University (2025). LASER pētījums par Latvijas augstākās izglītības sistēmu. Available at: https://www.rsu.lv/sites/default/files/imce/Zinas/laser_petijums_2025.pdf

⁴²⁷ Education Exchanges Support Foundation. II tyrimas – Užsienio studentų, atvykusių studijuoti į Lietuvą, ekonominės naudos tyrimo ataskaita [“Study of Economic Benefits of Foreign Students Who Came to Lithuania to Study”]. Vilnius: Švietimo mainų paramos fondas, 2023. <https://smpf.lrv.lt/public/canonical/1729513715/452/II%20tyrimas%20-%20U%C5%BESienio%20student%C5%B3,%20atvykusi%C5%B3%20studijuoti%20%C4%AF%20Lietuv%C4%85,%20ekonomin%C4%97s%20naudos%20tyrimo%20ataskaita.pdf>

⁴²⁸ Centraal Planbureau (CPB). (2019). *De economische effecten van internationalisering in het hoger onderwijs en mbo*.

⁴²⁹ Matos, F., Leitão, J., & Ferreira, J. (2024). Impact of international student mobility in rural Portuguese regions: Regional economic and societal impacts. *Sustainability*, 16(4), Article 1359. <https://doi.org/10.3390/su16041359>

⁴³⁰ Kluge, J., & Schnabl, A. (2019). *The economic effects of Erasmus+ on the Slovenian economy*. IAS Vienna. <https://erasmusplusresearch.eu/research/economic-effects-erasmus-slovenian-economy>

⁴³¹

http://www.sepie.es/doc/comunicacion/publicaciones/2021/impacto_econ_de_los_estudiantes_internacionales_en_esp_2020.pdf

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Country	Economic/CBA analysis in past ~10 years?	Key findings (summary)	Net impact of incoming degree mobility
Sweden	Yes (economic impact; taxes)	Annual impact SEK 3.5–4bn (€310–360m); ~90% freemovers; income tax from stayers SEK 700–1,300m (€60–115m); non-economic benefits noted ⁴³² .	- Not assessed (gross impact only)

Source: country reports. Cost and benefits refer to all international students, including both from EU and non-EU countries (no disaggregation by student origin). Net impact column: ✓ Net positive = study finds net benefit exceeds net cost; ✗ Net negative = study finds net cost exceeds net benefit; - Not assessed = only gross or partial impacts estimated, no full cost-benefit comparison; - No study = no national study identified; N/A = country mapping focuses on outbound rather than incoming mobility.

⁴³² Swedish Institute & WSP Sverige AB (2022). Den ekonomiska effekten av internationella studenter [The economic impact of international students in Sweden]. Stockholm: Swedish Institute. Available at: https://si.se/app/uploads/2022/07/den-ekonomiska-effekten-av-internationella-studenter_juli22.pdf

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