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Seismic – Student and staff mobility in times of crisis

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List of Abbreviations

CY	Cyprus
DE	Germany
ES	Spain
GR	Greece
FR	France
IE	Ireland
IS	Iceland
IT	Italy
PL	Poland
PT	Portugal
HEI	Higher education institution
SMS	Student mobility for studies
SMP	Student mobility for placements
STA	Staff mobility for teaching assignments
STT	Staff mobility for trainings
GDP	Gross Domestic Product

1. Executive summary

This study takes an explorative look at the possible effects of the financial crisis on the mobility of students and staff participating in the Erasmus Programme from ten European countries. These countries are: Cyprus, France, Germany, Greece, Ireland, Iceland, Italy, Poland, Portugal and Spain.

The study is based on the assumption that the effects of the financial crisis may be quantitative, qualitative and/or geographic in nature and either positive or negative: it may make opportunities abroad appear more attractive, but it might also cause financial obstacles to going abroad.

The data source for the analysis was the administrative statistics from the Erasmus Programme. Additionally, semi-structured interviews were carried out with leaders of the National Agencies that run the Erasmus Programme in the participating countries and are familiar with the developments in their own country. This assured an expert interpretation of the developments apparent in the country data. The results were also discussed with the representatives of the National Agencies at two international conferences organized by the DAAD (in June and September 2013). The report includes country sheets with country-specific data and the results of the national interviews in the appendix.

The data analysis clearly shows that mobility numbers of students and staff going abroad have continued to increase despite of the financial crisis. Outgoing study mobility has been rising annually from academic year 2008/09 to 2011/12 by 6% on average across all Erasmus countries, with the top-performing countries (the top quarter) having an average annual growth of at least 12%. The growth rate for placements is even higher lying on average at 18% and 29%, respectively. Regarding staff, the annual growth rate for outgoing assignment mobility has been on average 4% and 21% for training mobility. This means that the benefits of mobility continue to be recognised and the Erasmus programme remains an important mobility promoter.

At the same time, the growth rates have slowed for all types of mobility – for students and for staff and for outgoing and incoming mobility. This shows that the financial crisis has certainly had a dampening effect on mobility participation. A closer look at mobility trends and the interpretation of these facilitated by the national experts in the case study countries shows, however, that whilst the financial crisis appears to have dampened growth in mobility participation in many countries, it actually promoted growth in others. Mobility thus appears to be influenced by individual assessments of affordability and opportunity leading to counteracting trends between and in countries.

Changes to affordability for students are related to the financial situation of students' parents in many countries as well as to changes to public funding and to the chances for students to work alongside their studies at home or abroad. In the case that these have deteriorated, they will make it harder for a student to afford a period abroad. In most of the cases, only some changes to public budgets have been passed on to students, but the interview partners warn that this is starting to change and could have future impacts on mobility rates. For staff public budget cuts have already led to reductions in staff salaries, which have affected the affordability of periods abroad directly.

It may be the overall perception of periods abroad as an opportunity, which has led to the maintenance of growth in mobility numbers in both staff and student numbers. This more utilitarian perception of mobility may be changing participation in Erasmus. Certainly durations abroad are becoming shorter and placements are being chosen more and more frequently by students instead of studies.

The study recommends that the coordinators of the Erasmus Programme at European level, but particularly at national level, work together to monitor further effects of the crisis using both administrative data and their interpretive expertise. National Agencies for mobility may benefit from forming explicit strategic partnerships in order to ensure further support and long-term growth in Erasmus participation.

2. Zusammenfassung

Diese explorative Studie untersucht die möglichen Auswirkungen der Finanzkrise auf die Teilnahme von Studierenden und Hochschulmitarbeiter(inne)n aus zehn europäischen Ländern am Erasmus-Programm. Diese Länder sind: Deutschland, Frankreich, Griechenland, Irland, Island, Italien, Polen, Portugal, Spanien und Zypern.

Die Studie geht von der Annahme aus, dass die Auswirkungen der Finanzkrise quantitativer, qualitativer und / oder geografischer Natur sein und dabei sowohl positiv als auch negativ wirken können: so könnte Auslandsmobilität unter den Bedingungen der Krise für manche Personen attraktiver werden, aber sie könnte ebenfalls zu höheren finanziellen Hindernissen führen, die Auslandsmobilität hemmen.

Die administrativen Statistiken aus dem Erasmus-Programm wurden für die Analyse als Hauptdatenquelle verwendet. Zusätzlich wurden mit leitenden Personen aus den Nationalen Agenturen, die in den teilnehmenden Ländern für das Erasmus-Programm zuständig sind, semi-strukturierte Interviews zur Interpretation der Analysen geführt. Diese Personen gewährleisteten eine nationale Interpretation der Entwicklungen, die in den Länderdaten sichtbar wurden. Die Ergebnisse wurden auch mit den Vertreter(inne)n der Nationalen Agenturen bei zwei DAAD Konferenzen (im Juni und September 2013) diskutiert. Der vorliegende Bericht enthält länderspezifische Datenblätter mit den Ergebnissen dieser analytischen Schritte in seinem Anhang.

Die Analyse der Daten zeigt deutlich, dass sich die Mobilitätszahlen von Studierenden und Hochschulmitarbeiter(inne)n trotz der Finanzkrise erhöht haben. Auswärtsmobilität (*outgoing*) stieg jährlich im Durchschnitt um 6% in der Periode 2008/09 bis 2011/12. Unter den Erasmus-Ländern mit den höchsten Wachstumsraten (das oberste Viertel aller Länder) lag die Wachstumsrate sogar bei mindestens 12%. Bei Auslandspraktika liegt die jährliche Wachstumsrate sogar noch höher bei 18% bzw. 29%. In Bezug auf Hochschulpersonal beträgt die jährliche Wachstumsrate für Auswärtsmobilität zu Unterrichtszwecken (*assignment mobility*) im Durchschnitt 4%, zu Fort- und Weiterbildungszwecken (*training mobility*) 21%. Alles in allem führt dies zur Einschätzung, dass die Vorteile der Mobilität hoch geschätzt werden und dass das Erasmus-Programm eine zentrale Rolle für die Mobilitätsförderung spielt.

Zur gleichen Zeit hat sich das Wachstum für alle Arten von Mobilität verlangsamt – für Studierende wie für das Hochschulpersonal und sowohl für auswärts- als auch für einwärtsgerichtete Mobilitätsströme. Dies zeigt, dass die Finanzkrise zweifellos einen dämpfenden Effekt auf die Teilnahme an Auslandsmobilität hatte. Ein genauerer Blick auf Trends zur Mobilität und auf deren Interpretation durch die nationalen Experten in den Fallstudienländern zeigt jedoch, dass, während die Finanzkrise das Wachstum in vielen Ländern gedämpft hat, sie in anderen Ländern oder für bestimmte Teilnehmergruppen die Mobilität gefördert hat. Mobilität scheint somit von den Bewertungen der Individuen abzuhängen, die die Fragen der Erschwinglichkeit und Opportunität abwägen.

Änderungen an der Erschwinglichkeit eines Auslandsaufenthalts für Studierende hängen in vielen Ländern von der finanziellen Situation der Eltern der Studierenden, von Änderungen der öffentlichen Finanzierung und von veränderten Chancen für Studierende, neben dem Studium zu arbeiten (zuhause oder im Gastland) ab. In dem Maße, wie sich diese Bedingungen verschlechtert haben, wird ein Auslandsaufenthalt für Studierende schwerer durchzuführen sein. In den meisten Fällen wurden bisher nur eingeschränkt Änderungen in den öffentlichen Haushalten an die Studierenden weitergegeben, aber die Interview-Partner(innen) warnen, dass sich diese Situation verändert, was künftig deutlichere Auswirkungen auf die Mobilitätsteilnahme erwarten lässt. Für Hochschulpersonal haben öffentliche

Budgetkürzungen bereits zu einer Reduzierung der Gehälter geführt, die die Erschwinglichkeit des Auslandsaufenthalts verschlechtert.

Es kann angenommen werden, dass die allgemeine Wahrnehmung eines Erasmus Auslandsaufenthalts als Chance für den Anstieg sowohl der Studierenden- als auch der Personalmobilität verantwortlich ist. Diese mehr utilitaristische Wahrnehmung von Mobilität verändert jedoch möglicherweise die Teilnahme an Erasmus qualitativ. Es gibt diesbezüglich Anzeichen, dass die Dauer der Aufenthalte kürzer und Praktika gegenüber Studienprogramme populärer werden.

Die Studie empfiehlt den Koordinatoren des Erasmus-Programms auf europäischer Ebene, aber vor allem auf nationaler Ebene zusammenzuarbeiten, um die weiteren Auswirkungen der Finanzkrise mithilfe der administrativen Daten und ihrer interpretativen Kompetenz aufmerksam zu verfolgen. Nationale Agenturen für Mobilität könnten eventuell von der Bildung strategischer Partnerschaften profitieren, um eine gemeinsame Förderung und langfristiges Wachstum der Erasmus-Teilnahmezahlen zu gewährleisten.

3. Purpose and object of study

The purpose of this study was to take a first explorative look at the possible effects of the European economic and financial crisis on mobility within the European Union's Erasmus programme. The German Academic Exchange Service (DAAD) commissioned the study under the assumption that the crisis might seriously change, or indeed inhibit, mobility participation.

The study focussed particularly on ten case study countries, the majority of which are commonly seen as having been affected by the crisis. The others were chosen as a balance and to see if the effects could be recognised in countries such as Germany, on the assumption that at least some effects might be visible there too.[1] The selected countries were: Cyprus, France, Germany, Greece, Ireland, Iceland, Italy, Poland, Portugal and Spain.

The first analysis was undertaken using the administrative statistics of the Erasmus programme. In order to better understand, interpret and explain the possible statistical changes in different countries, interviews were carried out with mobility experts from the national agencies in each of these countries.

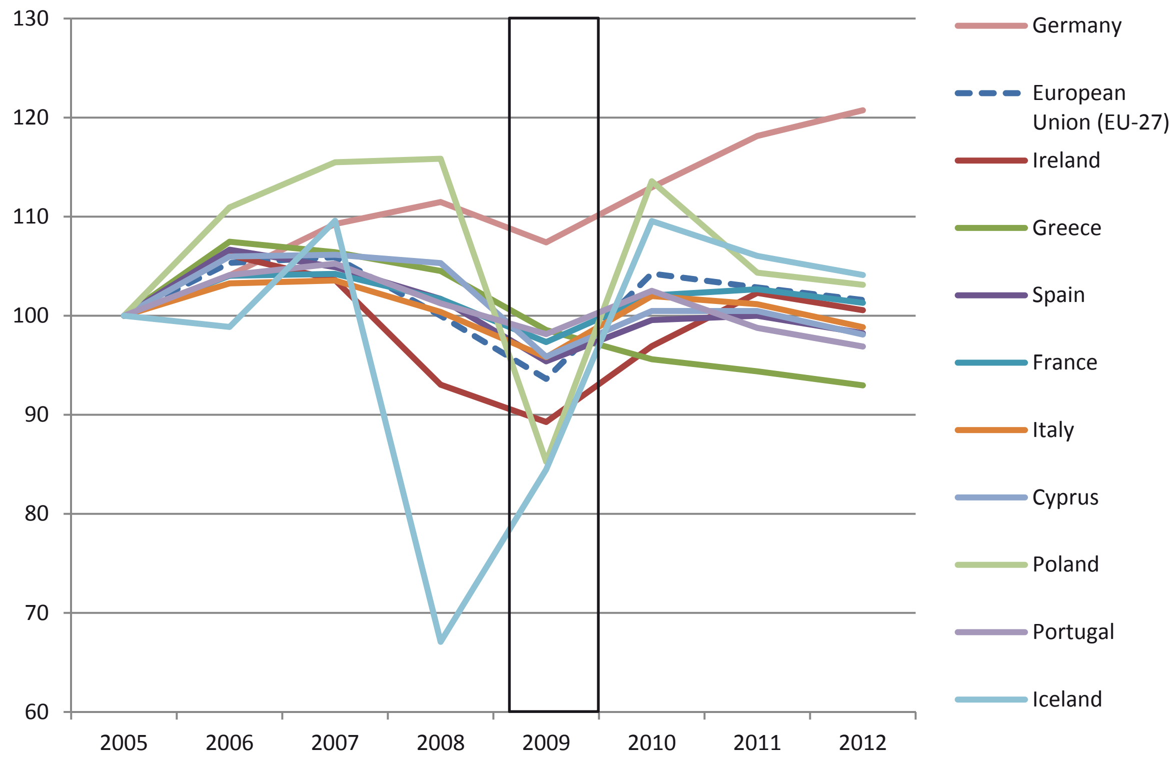
The global financial crisis of 2008 affected many European countries to different magnitudes. All European countries were subject to a major economic slowdown in 2009, where the gross domestic product (GDP) per capita dropped from €25,100 to €23,500. During this period people lost jobs, lost savings and became insecure about the future. Following this, governments also adopted austerity packages to cope with the levels of public debt. Despite the recovery of GDP in most countries, in Ireland, Greece, Iceland, Portugal, Italy and Spain, the economic production per capita (GDP) was little higher in 2012 than seven years earlier, in 2005 (see Figure 1).

The Seismic study looked at the Erasmus statistics in the light of these changes to investigate possible impacts of this economic downturn on mobility rates. It found divergent results, which are related to the fact that the economic crisis can in some cases work as a hindrance, largely related to the question of affordability of the period abroad, and as a motivator, which makes opportunities abroad more attractive.

The affordability of a period abroad is facilitated by the Erasmus programme through the provision of supporting funds to students and staff. This financial support takes into account the additional costs for a participant when undertaking a temporary stay abroad. Additionally, students will continue to be supported by the study support from their home country. Public support is an important source of funding to cover the costs of studying abroad, but private sources for students and university employees are equally important. In some countries, the private financing of the stay abroad is even the primary source of funding. Whilst the Erasmus funding has not decreased due to the financial crisis, public national funding and the chances of obtaining private funding for people planning to undertake a period abroad have frequently changed.

[1] See Appendix A for how the countries were selected and on some of their basic characteristics.

FIGURE 1. DEVELOPMENT OF GDP PER CAPITA IN SELECTED COUNTRIES, 2005-2012 (2005 = 100)



Source: Eurostat data set

The study started out from the assumption that the financial crisis could affect the conditions of undertaking a period abroad within the Erasmus programme in the following ways:

a) in relation to students

- Public support for students is cut nationally – either in the form that individual students receive less support, making the stay abroad more expensive, or such that the number of recipients is reduced.
- The study costs in the home university become more expensive due to higher tuition fees or living costs and/or students' possibilities to cover their costs through jobs or parental support are reduced. This makes it more difficult for students to cover the additional costs of a period abroad.
- Increased tuition and/or living costs in possible host countries, but also information about crisis situations in these countries prevent willing students from choosing them for mobility periods abroad.

b) in relation to academic staff

- Salaries are reduced, or the predictability of continued employment in the higher education institution is uncertain. This makes it more difficult for academic staff to take the opportunity of mobility abroad.
- The opportunities for teaching and research periods are reduced in the host countries due to the financial crisis, so even fewer researchers from other countries have the possibility to obtain a temporary position in them.

Possible effects on the mobility of either group are threefold:

- Quantitative in nature – both less people will undertake periods abroad through the Erasmus programme from crisis countries and less people from other countries will visit them on a temporary period abroad.[2]
- Qualitative in nature – the type of participation will change under these conditions, e.g. the length of stay abroad might become shorter or indeed longer.
- Geographic in nature – the location of the period abroad will change under these crisis conditions.

These effects were investigated using Erasmus administrative data and interviews with experts from the national agencies for the Erasmus programme.[3]

[2] It is also possible that the number of people undertaking a period abroad remains the same, but the socio-demographic characteristics of these people changes. This possible change cannot be investigated within the framework of this short study.

[3] See Appendix C for more information on how the interviews were performed and the named interview partners.

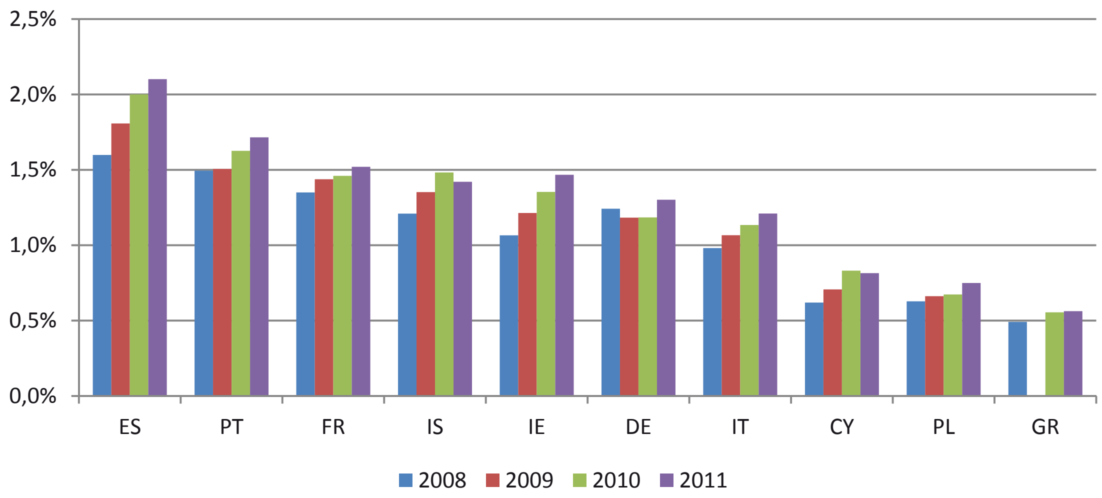
4. Main findings

4.1. Quantitative aspect: Student outgoing mobility

The first conclusion is that international mobility via the Erasmus programme has shown itself to be remarkably robust despite the financial crisis. Despite the economic downturn, Erasmus mobility numbers continue to rise. Outgoing study mobility has been rising annually in the period 2008/09 until 2011/12 by 6% on average across all Erasmus countries, with the top-performing countries (the top quarter) having an average annual growth of at least 12%. The growth rate for placements is even higher lying on average at 18% and 29%, respectively. This means that international mobility continues to grow and that the Erasmus programme is an important driver of this development.

The share of mobile students has also increased over the period of investigation (from 2008/09 to 2011/12) in the student populations of the case study countries, as shown in Figure 2. The highest growth in share of mobile students – studies and placements – (over 30%) is to be found in Ireland, Spain and Cyprus; the lowest (under 14%) in Greece, France and Germany.

FIGURE 2. SHARE OF MOBILE STUDENTS (SMS + SMP COMPARED TO NUMBER OF STUDENTS IN ISCED 5A AND 5B), 2008-2011

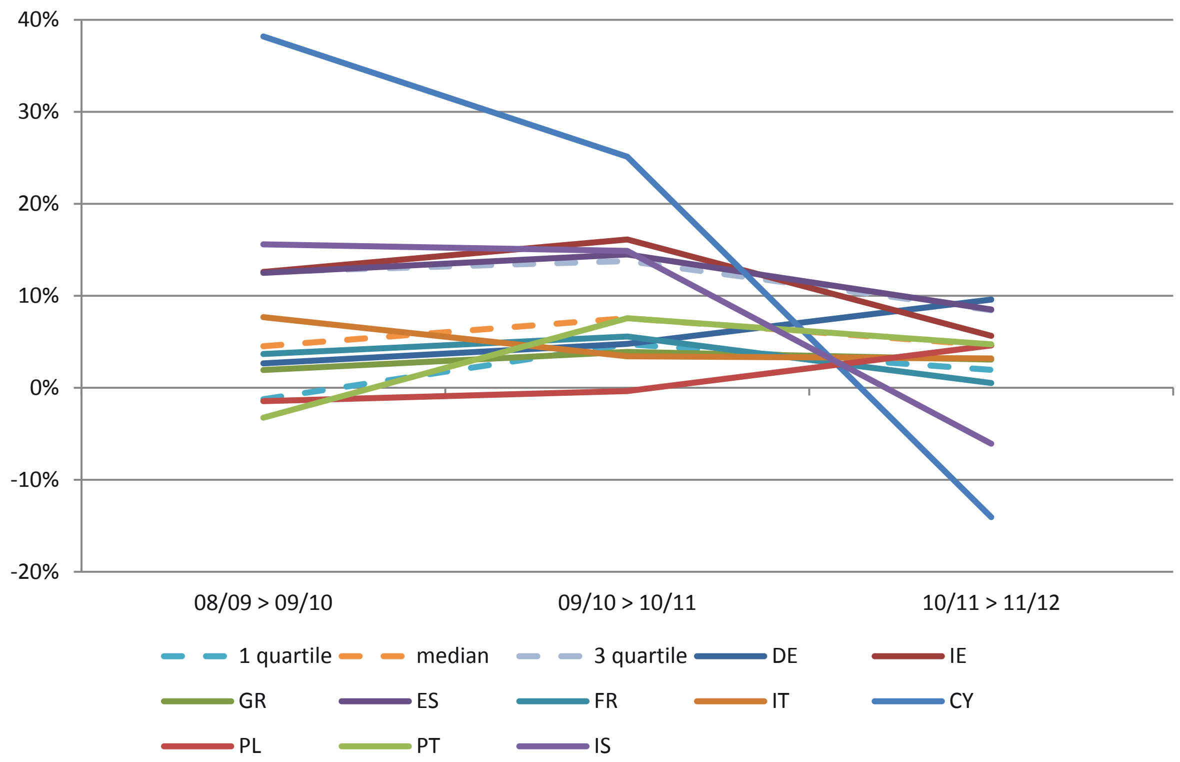


Source: Eurostat data set. Own calculations. No data for Greece in 2009.

At the same time, even if mobility numbers continue to rise in the period of investigation, the growth has significantly slowed in most countries. Figure 3 shows the average annual growth rates for study mobility. The chart shows a large slowdown in growth between 2010/11 and 2011/12.

Students undertaking outgoing mobility are often dependent on a combination of state and family support, so changes to these can be expected to have an effect. Regarding ***outgoing study mobility***, there has been a large slow-down in growth in the case of Cyprus (the largest change), Iceland, Ireland, Spain, Italy and France. Whilst Greece's mobility numbers have been increasing over time, they remain at a low rate.

FIGURE 3. ANNUAL GROWTH OF OUTGOING ERASMUS STUDY MOBILITY, 2008/09-2011/12



Source: Erasmus statistics. Own calculations.

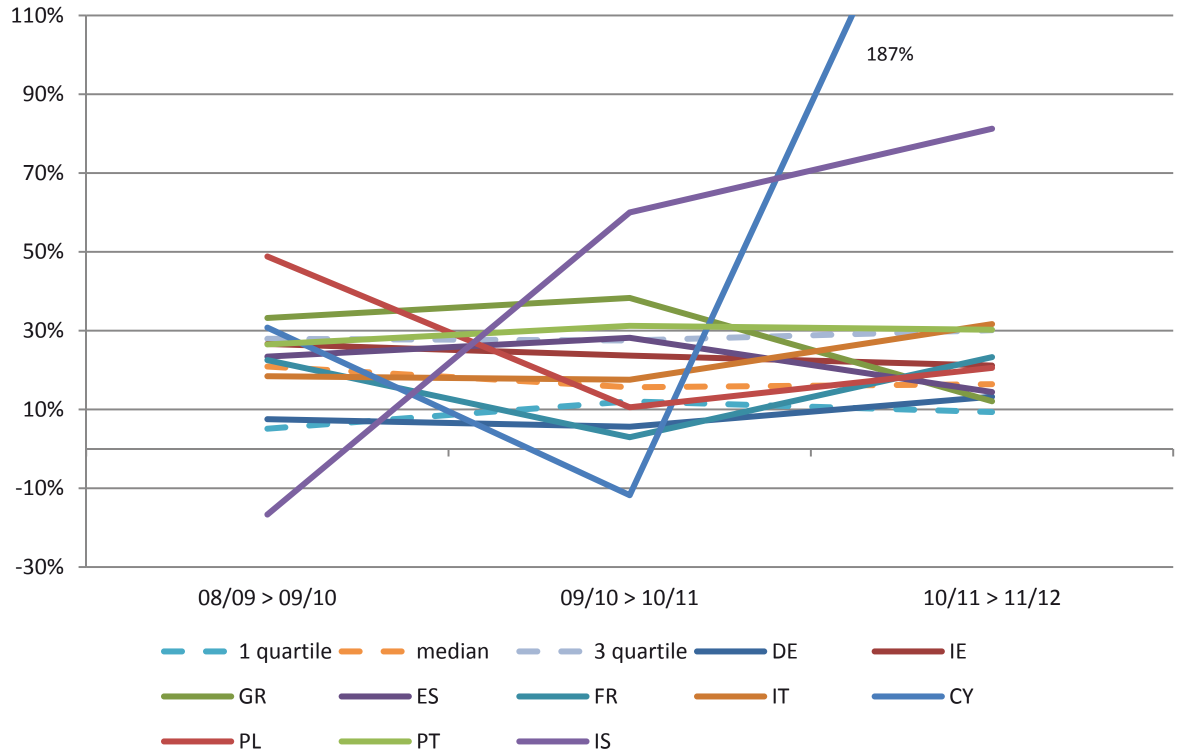
How to read this and the following charts: The chart shows the average annual growth for all Erasmus countries. The 1st quartile shows the maximum average growth per year for the bottom quarter of all Erasmus countries, i.e. with the lowest growth, the 3rd quartile shows the minimum average growth per year for the top quarter of all the countries, i.e. with the highest growth and the median shows the average growth. For example, in 2010/11 the number of students studying abroad on the Erasmus programme increased on average about 8% compared to the previous year, but the top quarter of Erasmus countries (countries that had the highest average growth per study year) increased by nearly 14%. The chart shows a large slowdown in growth between the academic years 2010/11 and 2011/12.

The interviews conducted with mobility experts in the ten case study countries pointed to some issues which may be affecting these mobility rates. In the cases of Cyprus, Ireland, Portugal, Spain and Greece, the interviewees pointed to the dependence of students on parental funding, which is now severely limited in these countries due to financial insecurities. At the same time, the interview partners for Greece and Spain pointed out that the Erasmus grant is seen by some students as an opportunity to leave the country and improve their study prospects abroad. The decline seen for Iceland was deemed related to the large deflation of the Icelandic krona by the interviewed expert. The rise in Poland, which appears to follow an opposite trend, is explained by the interviewed expert as being caused by the increasing perception of the importance of having been abroad by Polish students.

Regarding ***outgoing placement mobility***, the picture is slightly different (see Figure 4). The chart shows a slowdown between 2010/11 and 2011/12. There was a slowdown for Poland, Greece, Spain and Ireland, but large increases in annual growth for Cyprus and Iceland. The interview partners for Greece and Ireland pointed to the special opportunities provided by a placement for future employment both in the host country or for making a graduate more attractive in their home labour market following their studies, but this does not seem to have been strong enough to keep the growth rates high. Additionally, the respondent for Greece pointed to the increasing strategy of students to undertake shorter placements in smaller towns in order to lower costs.

The growth rate in France is also relatively high. The interview expert for this country argued that this has been supported by the obligation to undertake placements during studies, which is being introduced to many undergraduate programmes.

FIGURE 4. ANNUAL GROWTH OF OUTGOING ERASMUS PLACEMENT MOBILITY, 2008/9-2011/12



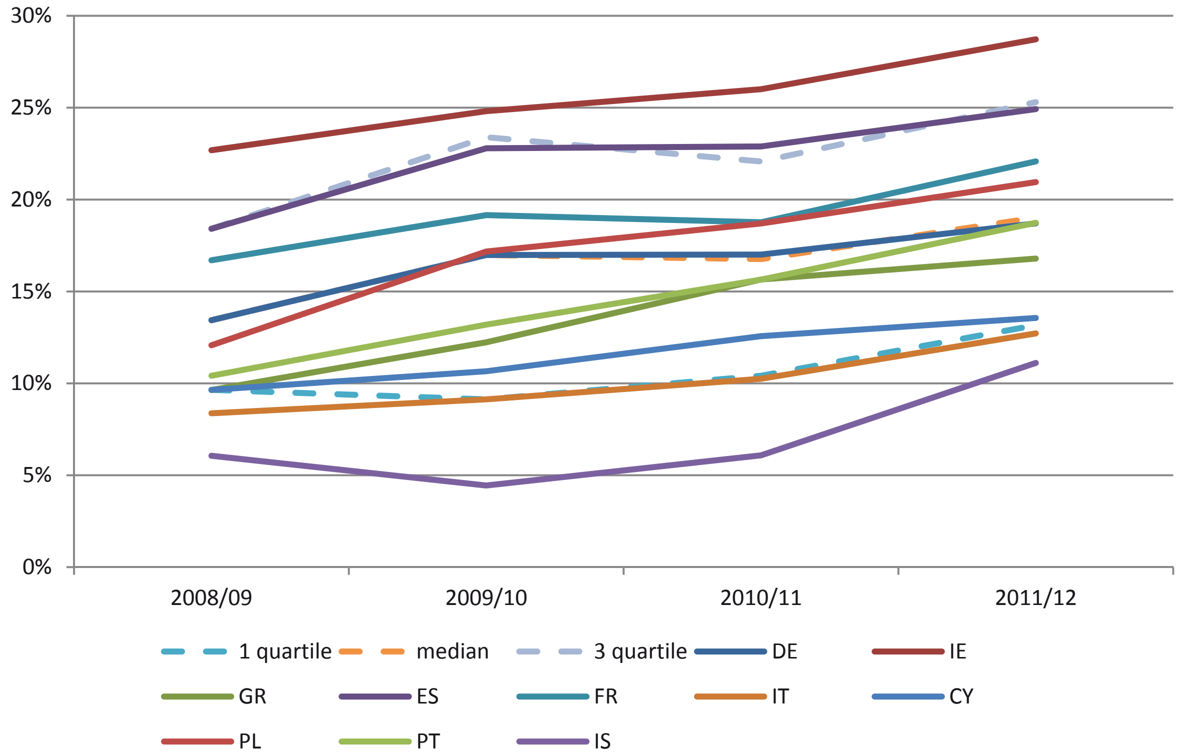
Source: Erasmus statistics. Own calculations

4.2. Qualitative aspect: Type of outgoing mobility

There does appear to be a general increase in the share of outgoing students undertaking placements abroad (see Figure 5). There is a relatively stable increase, which is probably based on a general promotion of the possibility of placements. While 13% of Erasmus students undertaking periods abroad in 2008/09 were on placements, this increased to 19% in 2011/2012 (+42%).

In the context of the financial crisis, this may be an indication of students seeing their period abroad in a more utilitarian light, i.e. with the perspective of improving employment prospects following their studies. The interview partner for Italy referenced a study which shows that 70% of Italian students see the Erasmus period as useful for their working careers.

FIGURE 5. SHARE OF MOBILE STUDENTS UNDERTAKING OUTGOING ERASMUS PLACEMENT MOBILITY PER STUDY YEAR, 2008/09-2011/12

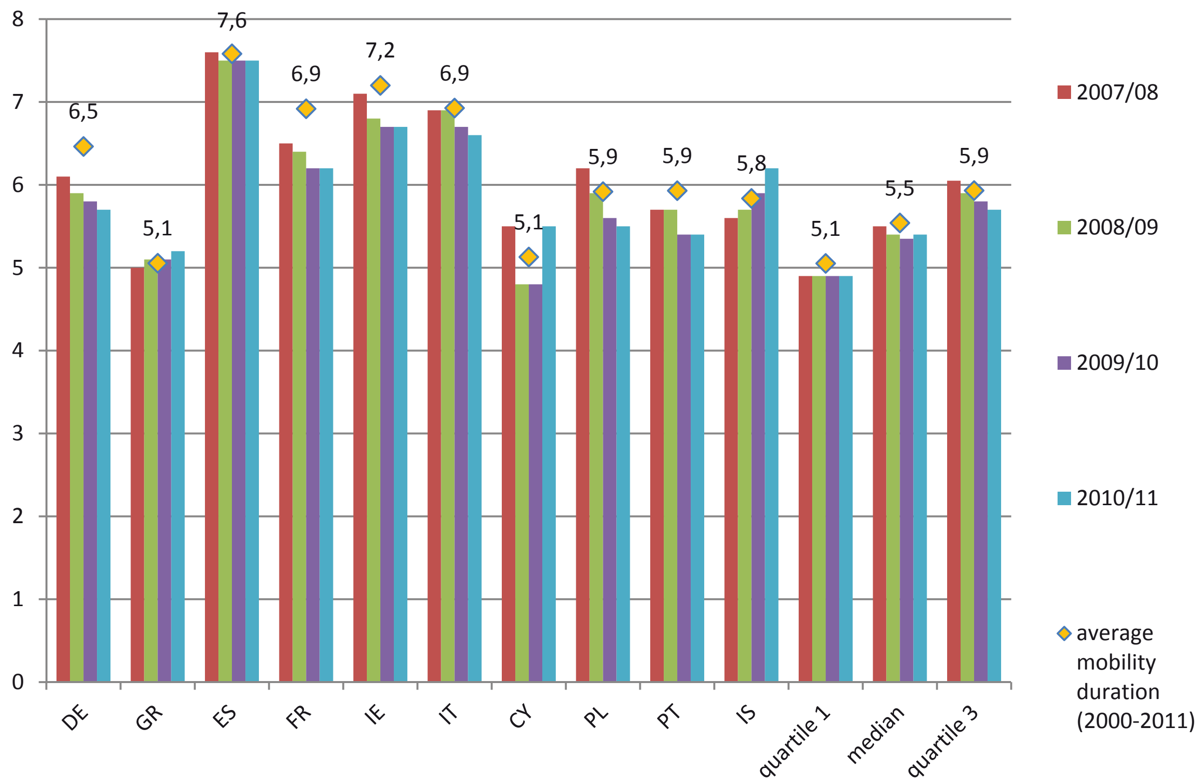


Source: Erasmus statistics. Own calculations

4.3. Qualitative aspect: Duration of outgoing mobility

Since it seems that affordability is a consideration for students when going abroad, it is interesting to investigate whether there has been a change to the average duration of a period abroad. Figure 6 shows that in most countries (even in a conservative comparison of the average over the last 11 years) the duration of the period abroad is shorter than in previous years and has continued to drop since 2007 (on average one week shorter). Exceptions are Cyprus and Iceland. The respondent from Iceland explained that some students undertaking short Erasmus periods abroad would have previously been undertaking a full degree programme abroad, but don't find it affordable anymore. This may account for the lengthening of the average period abroad seen in the chart.

FIGURE 6. DURATION OF MOBILITY PERIOD ABROAD (AGGREGATE SMS + SMP) IN MONTHS, 2007/08-2010/11



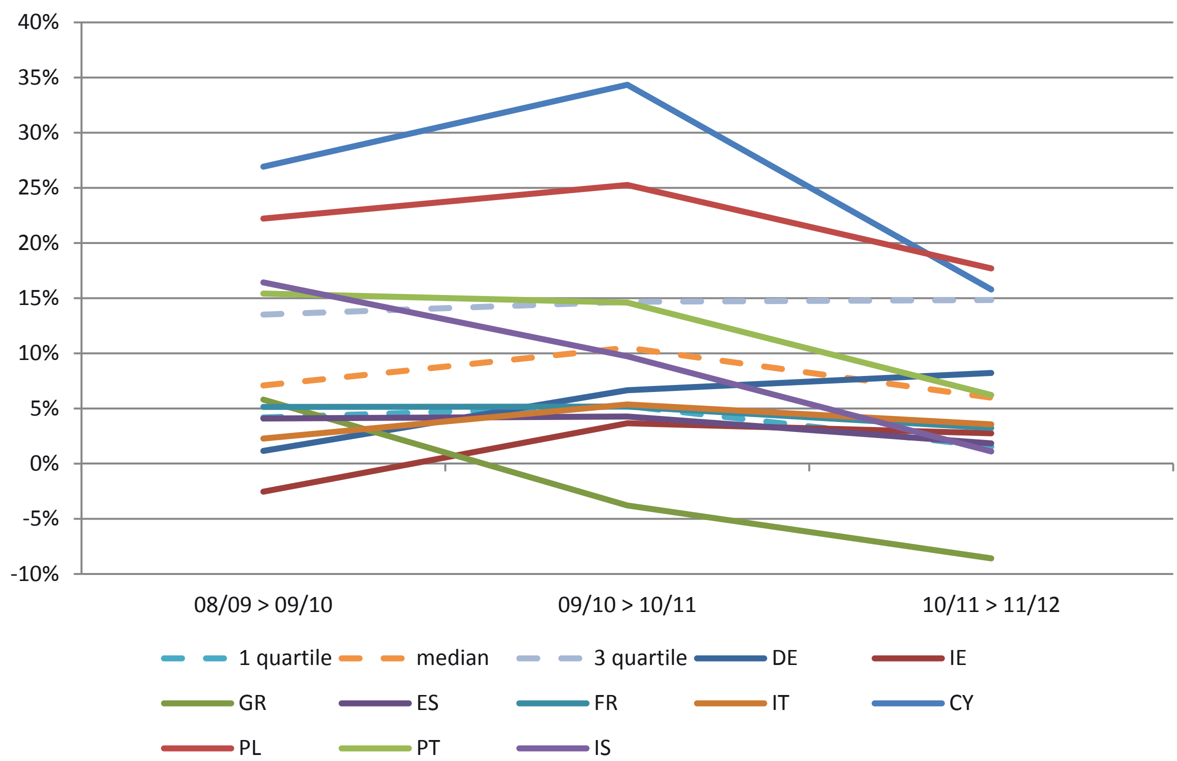
Source: Erasmus statistics. Own calculations

4.4. Quantitative aspect: Student incoming mobility

The growth rate of incoming study mobility has dropped overall in European countries (see Figure 7). However, the slow-down is not as marked as for outgoing study mobility – indeed, for the top quarter of countries a slight growth is evident. In the case study countries, only two of ten show increasing levels of growth (Germany and Ireland). According to the Polish interview partner, having international students increases the chances of the accreditation of a HEI's study programme. Although Poland does have a high level of incoming study mobility this 'pull-factor' does not seem to have been strong enough to keep the mobility growth rate at its comparatively high level in the period of investigation.

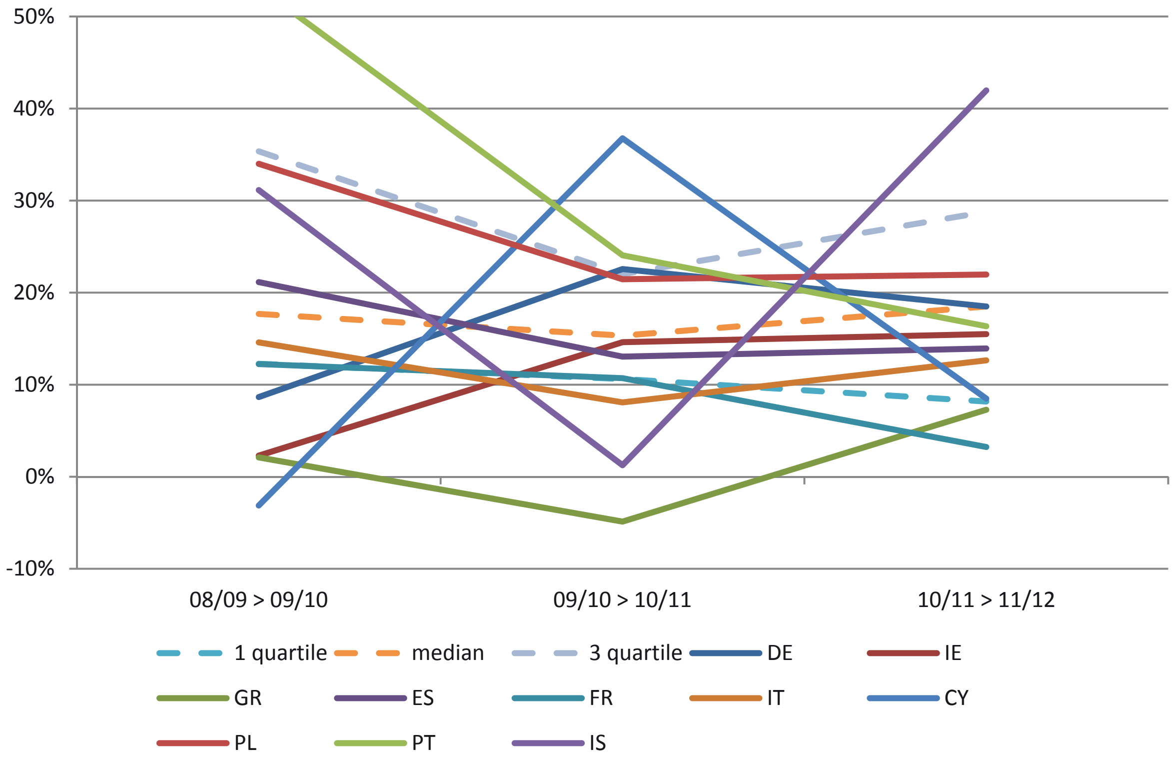
Many interview partners pointed to worries of instability as possible reasons why students would stay away, but also to rising costs and reduced chances of working alongside studies during the period abroad. However, these effects can also work the other way around. According to interview partners, the living costs in Ireland and Iceland have dropped due to the financial crisis, which may make these countries more affordable and hence attractive to some students.

FIGURE 7. ANNUAL GROWTH OF INCOMING ERASMUS STUDY MOBILITY, 2008/09-2011/12



This difference between outgoing and incoming mobility is even clearer for placements, with only the bottom quarter countries showing a drop in growth (see Figure 8). Growth is largest for Ireland and Germany. In the case of both of these countries, they started with very low growth rates (below the 1st quartile) and then displayed above or near average growth rates for the final period of observation. This is likely related to the opportunities presented in these labour markets (especially in Germany). Even in Greece, which displayed an overall decline between 2009/10 and 2010/11, growth has recovered suggesting a positive perception of opportunity in the sending countries (in this case, predominantly Latvia and Poland).

FIGURE 8. ANNUAL GROWTH OF INCOMING ERASMUS PLACEMENT MOBILITY, 2008/09-2011/12



4.5. Quantitative aspect: outgoing and incoming staff mobility

Regarding academics, the annual growth rate for assignment mobility has been on average 4% and 21% for training mobility. This means that the benefits of mobility continue to be recognised and the Erasmus programme remains an important mobility promoter. (See Figure 9 and Figure 10)

As with student mobility, the outgoing mobility of academic staff appears to be related to two different motivational factors, which work in different directions: affordability and opportunity provided by the period abroad. In most cases, the share of mobile staff continued to increase, only to slow down between 2010/11 and 2011/12.

FIGURE 9. ANNUAL GROWTH OF OUTGOING STAFF MOBILITY (STA + STT), 2008/09-2011/21

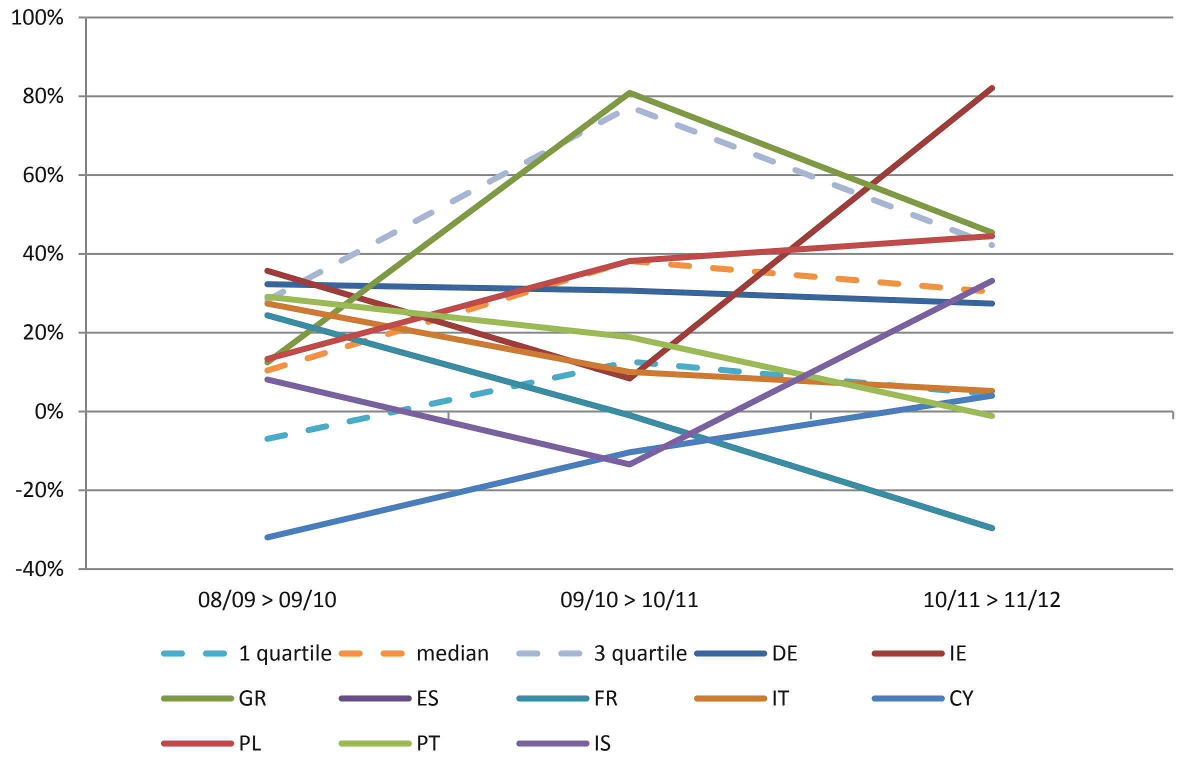
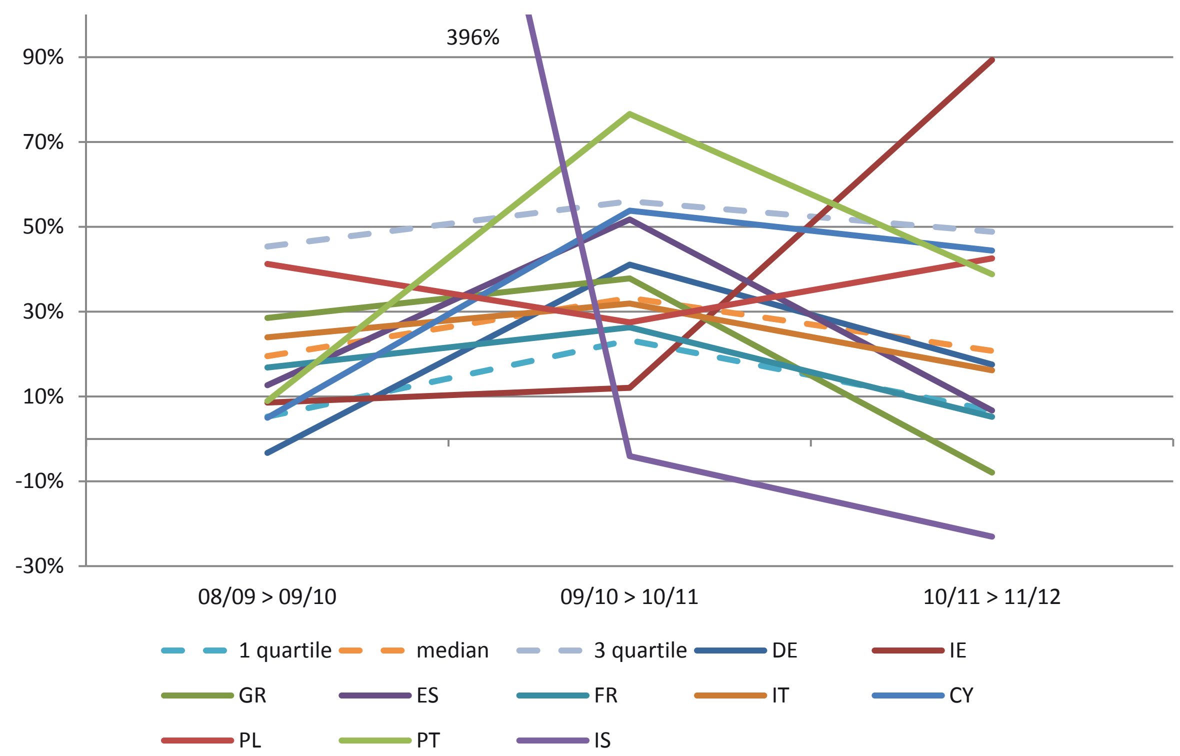


FIGURE 10. ANNUAL GROWTH OF INCOMING STAFF MOBILITY (STA + STT), 2008/09-2011/12



The interviews pointed to the fact that the financial crisis had also led to reductions in institutional budgets, which meant that academics could not be supported in their trips abroad through institutional co-funding (Cyprus and France). Portugal has seen a drop in outgoing academic mobility of both types (training and assignments) over the period of investigation. The interviewee pointed to the 10% wage cut which academics were subjected to in 2011. The national agency there has increased the national grant for a period abroad from 2013 in an effort to counteract this mobility inhibitor. The interviewee for Greece also pointed to large salary cuts, but also to the opportunity presented to academics to get out of the unstable Greek economic system. This may account for the very high initial level of growth in staff mobility in Greece, which subsequently slowed down in 2011/12, but remained at a high level in comparison to the other countries (near to the general trend for the top quarter of countries).

There are also new incentives to promote mobility at the institutional level. For instance, in Poland international mobility is increasingly being seen as a staff development strategy. Poland and Ireland are the only countries which have shown high growth levels for both outgoing and incoming staff.

4.6. Outlook

The main findings have highlighted that there have been both quantitative and qualitative changes which might be reasonably associated with the financial crisis. Taking all forms of mobility together for all countries participating in the Erasmus programme, there has been an annual average growth of 8%, with those countries with the highest growth rates (top quartile of countries on this measure) achieving a rate of 10% or higher and only the bottom quarter of countries with a rate lower than 5%. This means that international mobility continues to increase and that the Erasmus programme is an important motor of this development.

It is interesting to note that the growth rates for student mobility are different for study periods abroad and placements. Although placements only make up 19% of total student mobility (increasing from 15% in 2008/09), the growth rates are much higher than for study mobility. For outgoing placements there has been an annual average growth of 17%, with those countries with the highest growth rates (top quartile of countries on this measure) achieving a rate of 25% or higher and only the bottom quarter of countries with a rate lower than 12%. This would suggest a more utilitarian view of international mobility, which is being increasingly used by students to increase their 'employability' following graduation. The interviews carried out in the ten case study countries and referred to above confirm this interpretation and suggest that even study mobility is increasingly being seen in this light. This may be a qualitative effect of the financial crisis and the knock-on effects for students' uncertainty of employment in the labour market following graduation. This apparently increasing utilitarian view of mobility should be further investigated since it will have consequences for the further promotion and support of mobility periods abroad.

A closer look at mobility trends and the interpretation of these facilitated by the national experts in the case study countries shows that whilst the financial crisis appears to have dampened growth in mobility participation in most countries, it actually promoted growth in others. Mobility thus appears to be influenced by individual assessments of affordability and opportunity leading to counteracting trends between and in countries. The confluence of the effects of affordability and opportunity can also be seen for staff mobility.

We cannot say for sure which countries are affected in which ways, since we can presume that the mobility populations also differ from country to country. It can be argued that if participation in mobility abroad is mainly undertaken by the social elite of a country, the question of opportunity will dominate the decision to undertake mobility, whilst vice versa more inclusive mobility participation may be more affected by questions of affordability. This is a topic which subsequent research studies should take up, since it was not possible to look at this within the framework of this study.

Since the general economic situation is recovering in most countries (see Figure 1), any impacts of the financial crisis are likely to be related either: i) to knock-on effects of the crisis for public spending which is only just beginning to change, and/or ii) the psychological effects of insecurity about the future. This means that one could assume that the effects currently seen in the Erasmus statistics are only the tip of a possible seismic shift. It is therefore important that the coordinators of the Erasmus programme at European level, but particularly at national level, work together to monitor further effects of the crisis using both administrative data and their interpretive expertise. National agencies for mobility may benefit from forming explicit strategic partnerships in order to ensure further support and long-term growth in Erasmus participation.

5. Appendix A: Selection of countries

The DAAD, as commissioning body, determined 7 of the 10 selected countries. They were chosen as European countries which had attained most attention as crisis countries. The remaining three countries in the study were proposed by the authors. In the opinion of the authors, the case studies should include some non-crisis countries and provide an overall variance, which would support the relevance of the study.

The following criteria justify the selection of the countries listed in the table below.

- *The quantitative importance of the Erasmus programme for the national system* – It can be assumed that some impacts are only apparent when the proportion of foreign mobile students and university staff has a certain size. Regarding quantitative importance, the Erasmus programme is particularly relevant for the mobility of people in the countries of origin: Spain (ES), France (FR), Ireland (IE), Portugal (PT) and Iceland (IS). Currently, in these countries a relatively high percentage of students utilise the Erasmus programme abroad (about 1.5%). In addition, this also applies to Ireland and France for international placements.

- *The quantitative importance of the participants from a country for the Erasmus programme as a whole* – When important countries of origin of the Erasmus programme are included, the study's conclusions will be particularly relevant for the programme overall. Therefore, the major university systems are important, even if the proportion of students is lower relative to the national population. Around 58% of Erasmus students and 43% of all mobile university staff come from the countries of Spain (ES), France (FR), Germany (DE), Italy (IT) and Poland (PL).

- *Geographic parity* – The majority of the countries designated by the DAAD are in southern Europe. However, it is known that there are significant differences in programme participation between the geographical parts of Europe. The authors added a Western and an Eastern European country (Germany and Poland) to the list in order to reduce the dominance of countries where particularly the family plays such a prominent role in financing.[4]

- *The development of a country's budget deficit* – In the debates the budget deficit of a country has emerged as a main distinguishing feature of the crisis that restricts the action of governments in terms of public support.[5] Efforts to improve the national budget have led to cuts in the education budget in many countries.[6] The table below shows Germany (DE) as the only country with a positive balance in this regard. Countries with particularly large deficits are Spain (ES), Greece (GR), Ireland (IE), Portugal (PT) and Cyprus (CY).

[4] EUROSTUDENT IV. See: Orr, D.; Gwosć, C.; Netz, N. (2011): Social and economic conditions of student life in Europe. Online at: http://www.eurostudent.eu/download_files/documents/EIV_Synopsis_of_Indicators.pdf

[5] Cf. Press release Eurostat 2013 online at: http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/2-22042013-AP/DE/2-22042013-AP-DE.PDF

[6] Cf. European Commission/EACEA/Eurydice, 2013. Funding of Education in Europe 2000-2012: The Impact of the Economic Crisis. Eurydice Report. Luxembourg: Publications Office of the European Union. Online at: http://eacea.ec.europa.eu/education/eurydice/documents/thematic_reports/147EN.pdf

TABLE 1. BASIC DATA FOR THE SELECTED COUNTRIES

	Geo-graphic region	No. of students 2010	Share of national Erasmus participants in all Erasmus participants 2010 (%)				Share of national Erasmus participants in all national students 2010 (%)			Public deficit / surplus (%)	
			Students	Studies	Placement	HEI staff	Students	Studies	Placement	Average 2008-2012	2012
CY	south-east	19,356	0.1%	0.1%	0.0%	0.2%	1.4%	1.3%	0.1%	-4.6%	-6.3%
DE	middle	2,093,394	13.1%	13.2%	12.5%	8.6%	1.4%	1.2%	0.2%	-1.6%	0.2%
ES	south	1,529,759	15.6%	16.5%	11.6%	10.5%	2.4%	2.1%	0.3%	-9.1%	-10.6%
FR	west	1,611,605	13.7%	13.5%	14.6%	6.8%	2.0%	1.6%	0.4%	-5.6%	-4.8%
GR	south-east	400,375	1.5%	1.5%	1.3%	1.8%	0.9%	0.7%	0.1%	-11.1%	-10.0%
IE	west	141,415	1.1%	1.0%	1.6%	0.5%	1.8%	1.3%	0.5%	-14.6%	-7.6%
IS	north	17,412	0.1%	0.1%	0.0%	0.2%	1.5%	1.4%	0.1%	-9.8%	-5.4%
IT	south	1,937,167	9.5%	10.4%	5.5%	4.8%	1.1%	1.0%	0.1%	-3.9%	-3.0%
PL	middle	2,094,226	6.2%	6.1%	6.5%	12.2%	0.7%	0.6%	0.1%	-5.6%	-3.9%
PT	south	366,647	2.6%	2.6%	2.3%	2.3%	1.6%	1.4%	0.3%	-6.9%	-6.4%

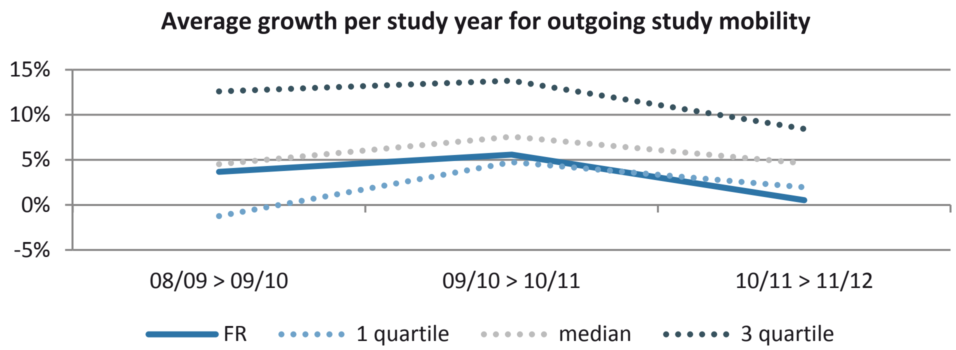
Sources: Student data ISCED 5a, Eurostat (educ_enrl1tl); Erasmus-Statistics Website of the European Commission; Public budget to GDP, Eurostat (gov_dd_edpt1), Data on Iceland 2011. Geographic division of Europe based on suggestion of Standing Commission for Geographic Division of Europe according to cultural criteria.

6. Appendix B: Country sheets

The following country sheets have two parts. The first part is a summary of the findings from the analysis of the Erasmus data carried out by the authors in combination with the interpretations provided by the national experts in the interviews. The second part is a full data annex for each country.

The data annex presents the main statistics for outgoing and incoming Erasmus student mobility (for studies and placements) and staff mobility (for teaching assignments and trainings) from 2008/09 to 2011/12. For each country there are five different figures:

- ***Share of mobile students and staff:*** This figure indicates how mobile students and staff are in different countries by showing the share of outgoing Erasmus students/staff out of the total student/staff population. These calculations are based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.
- ***Number of outgoing/incoming students/staff by type of mobility***. Next to the absolute numbers this chart also shows the share of Erasmus students doing placements or the share of Erasmus staff on trainings.
- ***Average growth per study year for outgoing/incoming students/staff by type of mobility.*** These figures show the average growth in mobility numbers compared to the previous study year. Actual mobility rates are not focussed on as these are different for each of the countries under investigation. Instead, the rate of change is analysed, under the assumption that the financial crisis and accompanying effects might impact mobility, by decreasing or increasing the number of people going abroad over time. To see how one certain country is similar/different to other Erasmus countries the average growth per year for the bottom quarter of all Erasmus countries with the lowest growth (1st quartile), the median growth and the average growth per year for the top quarter of all the countries that have the highest growth (3rd quartile) have been added.



- ***Average duration by type of mobility***. These figures show the average duration of the mobility period abroad (in months for students and in days for staff) for the country in comparison to the average duration abroad for all Erasmus countries.
- ***Top five host/sending countries by type of mobility***. These tables list the top five countries for each study year where most of the students/staff went abroad or came from for Erasmus mobility.

The sheets are ordered alphabetically.

CYPRUS

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of students in Cyprus going abroad for Erasmus mobility increased each study year until 2011/12 when it started to decrease. This was due to a decrease in study mobility as the number of students going abroad for placements actually increased about three times compared to previous study years. Until then, Cyprus had one of the fastest increasing numbers of outgoing study mobility. The share of mobile students in the total student population in Cyprus has been relatively low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 0.6% in Cyprus while in all Erasmus countries the average was 1.1%. During the years of economic crisis the share of mobile students has been increasing up to 0.8% in Cyprus and 1.5% in all Erasmus countries on average by 2011/12. The duration of studies abroad has been increasing during the crisis; nevertheless, students from Cyprus still spend a shorter time abroad on average for Erasmus mobility compared to students in other Erasmus countries. The top five destinations for study mobility have remained mostly the same during the years observed, although more students have started to go to Spain and the UK and fewer students have chosen Greece as their destination. Similar trends can be seen in placement mobility, where in 2010/11 almost half of the students chose Spain as their host country, although the next year this decreased to only 21%. The number of incoming students has been increasing steadily since 2008/09, giving Cyprus one of the fastest increasing numbers of students coming for study mobility (this number has doubled in 2011/12 compared to 2008/09). Cyprus also had one of the highest average growths for incoming placement mobility in 2010/11 compared to the previous year, but this slowed down during the next study year, becoming more similar to the countries with the lowest growth. The top five sending countries for studies and placements in Cyprus have remained mainly the same since 2008/09, although more students from Spain and fewer students now come for studies from Poland as well as fewer students for placements from Lithuania.

Context

Higher education and Erasmus mobility have been affected by the economic crisis, but not much so far. The national agency believes that the real impact will be seen in 2013/14 and onwards. The mobility numbers have been mainly increasing until 2013, but the first signs in the study year 2013/14 show that it is now changing. So far there have been no changes in the accessibility of grants and loans. The Erasmus grant in Cyprus is one of the highest in all Erasmus countries (about €600) and it has remained more or less the same so far although it is expected to decrease to €400-500 soon and might have an effect on mobility. There will be some changes to the national grants system in 2013. Public HEIs have no tuition fees and private ones have lowered their fees in 2013. Since the student grant includes support for travelling, students need a higher grant due to the high travelling costs to and from Cyprus.

Students in Cyprus are traditionally mobile: many of them go for higher education studies to Greece, the UK and other countries; many have training outside of Cyprus after graduation. Those that have remained in Cyprus for higher education are less motivated to go for Erasmus mobility as they have already decided not to go abroad. Outgoing placement mobility has been increasing lately as students see this as an opportunity to find a job outside of Cyprus.

The crisis has mostly had an impact on families as there have been cuts in salaries and most families have now at least one member unemployed. Parental support is crucial for student mobility, but so far the situation has not worsened much as parents still try to do their best to support their children, but this might soon worsen as the general situation in Cyprus becomes more difficult.

Students in Cyprus do not have the tradition of working alongside their studies which also makes it difficult for them to find temporary work abroad when they do their Erasmus. Until now, they have relied on their parents' support, but as the situation for families is getting more difficult, there might be a decrease in mobility numbers. The NA feels the need to train students to be better at finding a job abroad and also to find other ways to encourage mobility.

The economic crisis resulted in a major increase in rents which has made it more difficult for incoming and outgoing students to find and pay for their accommodation. Unfortunately, the campuses of universities offer fewer places for accommodation and students have to pay too much elsewhere. Also, the prices of plane tickets to and from Cyprus have increased significantly. It is also becoming more difficult for incoming students to find placement opportunities or temporary work in Cyprus as there is a higher demand now for low-skilled jobs by locals due to the crisis, and they have started to "take back" jobs that were previously undertaken by cheap labour from third countries. Even if incoming students find temporary jobs, the salaries are very low.

STAFF MOBILITY

Main trends

The overall number of staff going abroad in Cyprus has been decreasing steadily since 2008/09 although this decrease has been slowing down and the number of staff going abroad for training actually increased in 2011/12 compared to the previous study year. Nevertheless, Cyprus has had one of the lowest average growth rates for outgoing staff mobility. The share of mobile staff in the total staff population in Cyprus has been relatively high compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 7% in Cyprus while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff has been decreasing down to 5.2% in Cyprus whilst in all Erasmus countries on average the share increased up to 7.3% by 2011/12. The average duration of the mobility period abroad increased for both types of staff mobility in 2009/10 but has been decreasing since then. Compared to the average duration in all Erasmus countries, staff from Cyprus goes abroad for a shorter period of time. The top destinations for staff mobility have varied since 2008/09 as Greece has become the most popular host country for both types of mobility; the UK used to be the most popular for assignment mobility for some years, but has seen a great fall in 2011/12. At the same time, the number of incoming staff has been increasing in Cyprus, one of the highest average growth rates in 2011/12 for both types of staff mobility, although the average growth for incoming training has been slowing down compared to the previous study year. The top five sending countries for staff mobility have been changing during the economic crisis, although the share of staff coming from Greece has remained one of the highest and has been increasing steadily since 2008/09. Fewer staff now come to Cyprus from the UK and staff from Poland have started to undertake assignments in Cyprus instead of training.

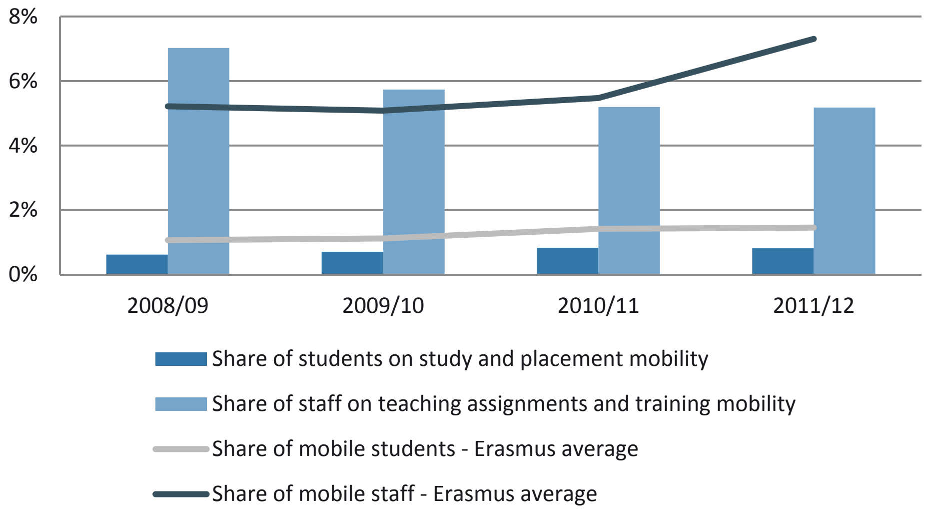
Context

According to the national agency, the decrease in staff mobility in Cyprus is not actually caused by a decrease in demand, but due to changes in the Erasmus budget. As initially the demand for student mobility was lower, Cyprus spent 12-15% of their budget on staff mobility. However, as the demand for student mobility increased, it was decided in 2011 to lower the budget for staff mobility to 10%, which led to a decrease in staff mobility numbers. So far it is not decided whether the budget for staff mobility will be increased again.

The demand for staff mobility is high and is expected to increase due to the budget cuts in higher education sector. So far, public institutions have been offering some opportunities for staff mobility (support for research activities abroad, etc.), but as their budgets become less flexible, these opportunities will be scrapped and staff might start to use Erasmus mobility more. There have been no changes so far to the working conditions and salaries of academic staff, although from 2013/14 the wage levels will decrease.

2. Data appendix

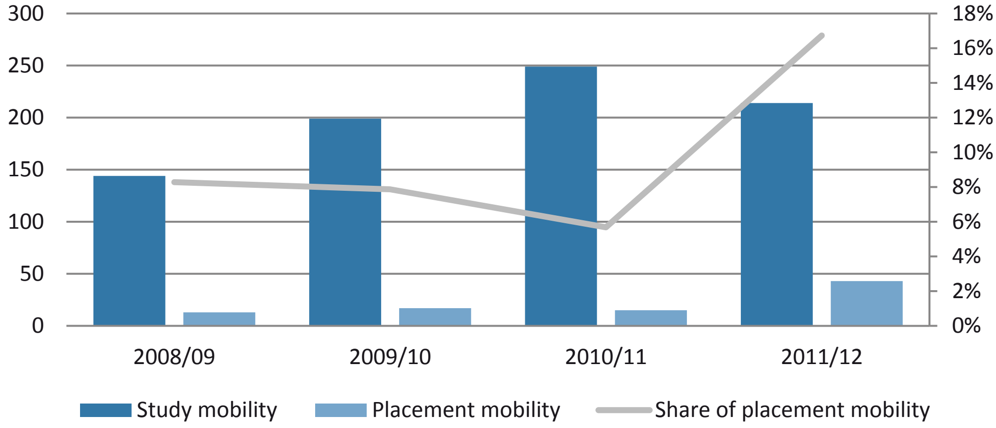
Share of mobile students and staff in Cyprus[7]



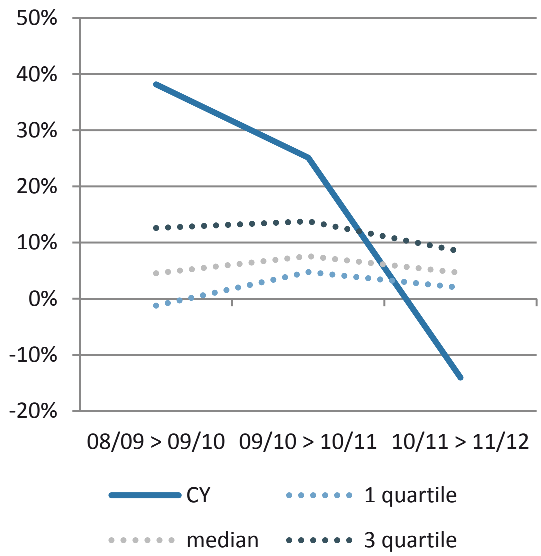
[7] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.

1. Outgoing student mobility

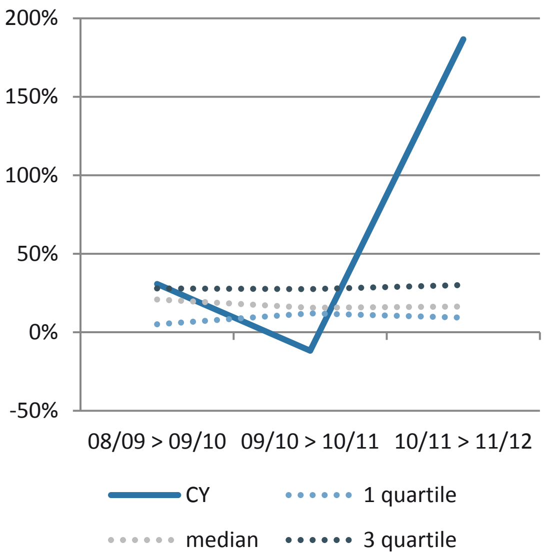
Number of outgoing students by type of mobility, share of mobile students going abroad for placements

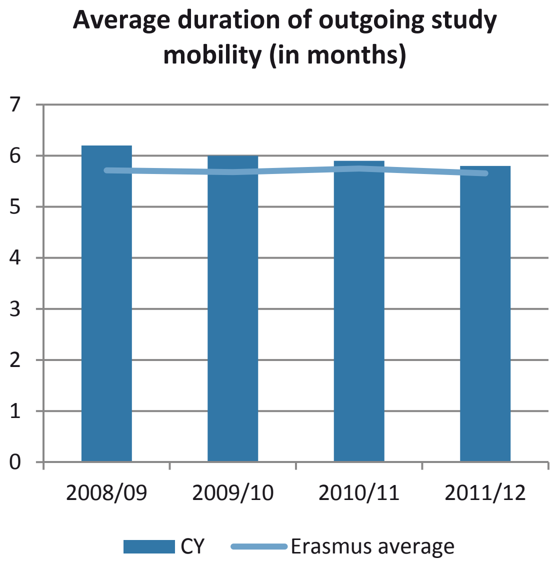


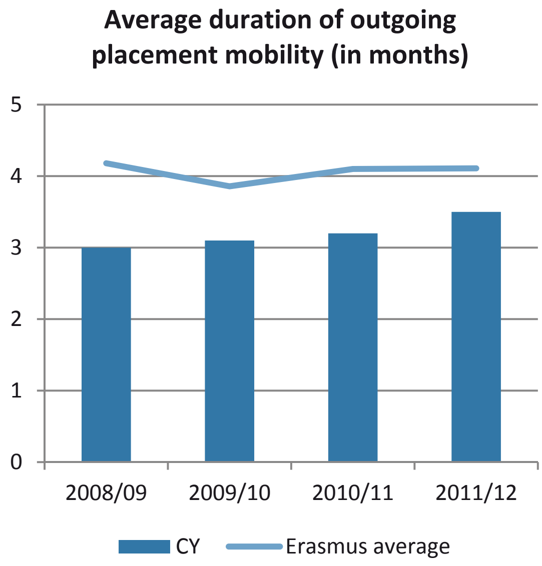
Average growth per study year for outgoing study mobility



Average growth per study year for outgoing placement mobility







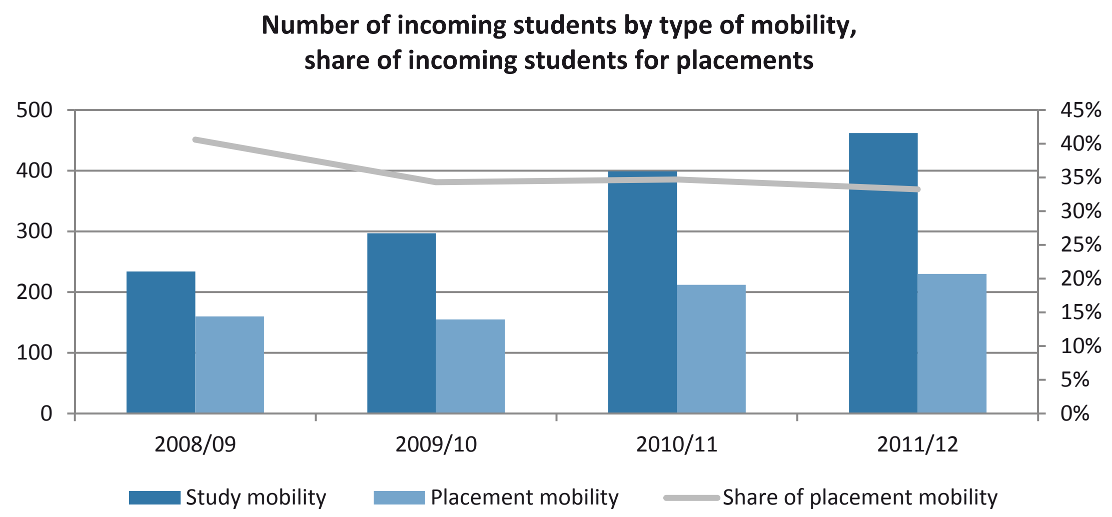
Top 5 host countries for study mobility

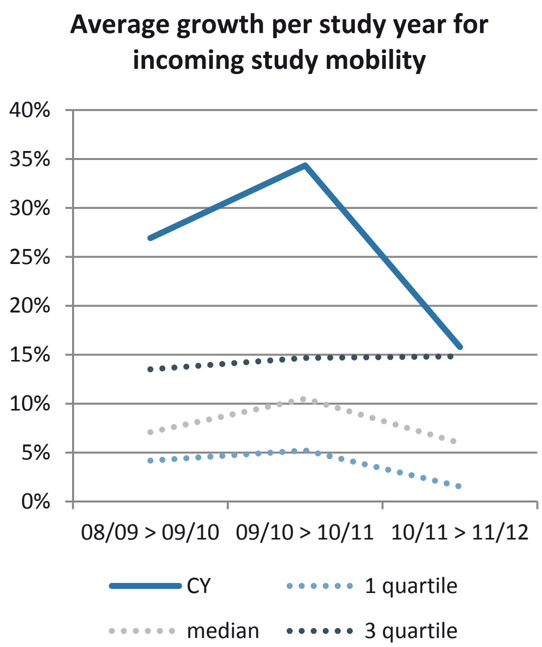
2008/09		2009/10		2010/11		2011/12	
GR	27%	**GR**	27%	**GR**	27%	**ES**	21%
BE	11%	**UK**	16%	**ES**	24%	**GR**	16%
ES	10%	**ES**	14%	**UK**	12%	**UK**	15%
FR	9%	**BE**	12%	**BE**	7%	**FR**	9%
AT	7%	**IT**	7%	**FR**	7%	**BE**	7%

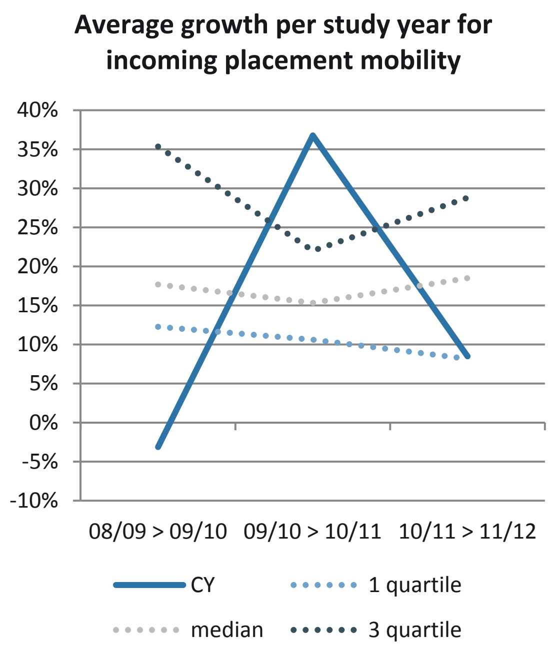
Top 5 host countries for placement mobility

2008/09		2009/10		2010/11		2011/12	
GR	46%	**ES**	35%	**ES**	47%	**GR**	23%
LT	31%	**GR**	24%	**GR**	20%	**ES**	21%
DE	8%	**UK**	24%	**UK**	13%	**UK**	9%
FI	8%	**IT**	6%	**BE**	7%	**FI**	7%
UK	8%	**PT**	6%	**IT**	7%	**DE**	5%

2. Incoming student mobility







Top 5 sending countries for study mobility

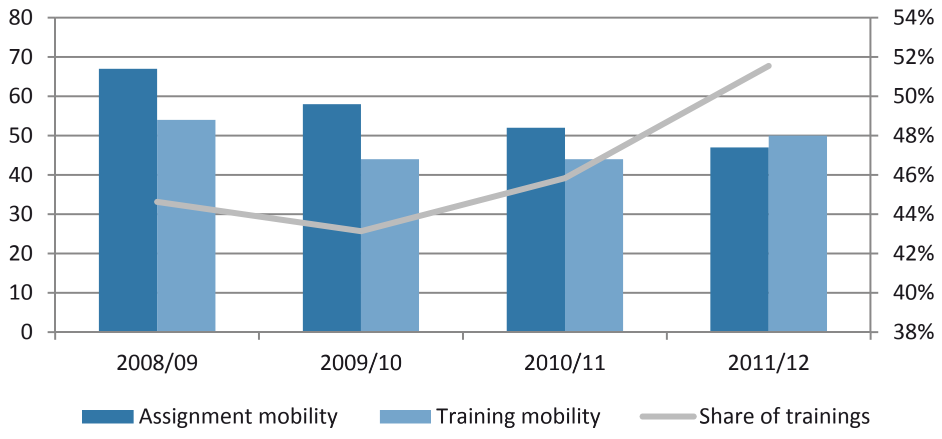
2008/09		2009/10		2010/11		2011/12	
PL	15%	**PL**	16%	**PL**	16%	**ES**	11%
FR	13%	**ES**	10%	**ES**	13%	**DE**	10%
DE	10%	**LT**	9%	**DE**	9%	**FR**	10%
IT	9%	**GR**	9%	**FR**	8%	**PL**	10%
ES	8%	**IT**	7%	**CZ**	7%	**UK**	8%

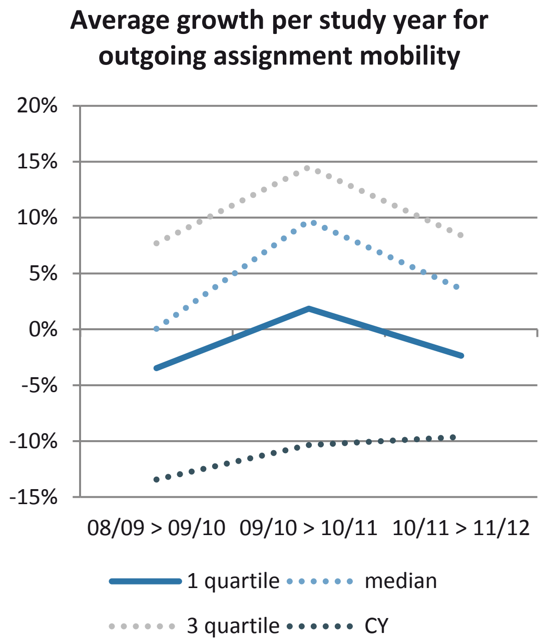
Top 5 sending countries for placement mobility

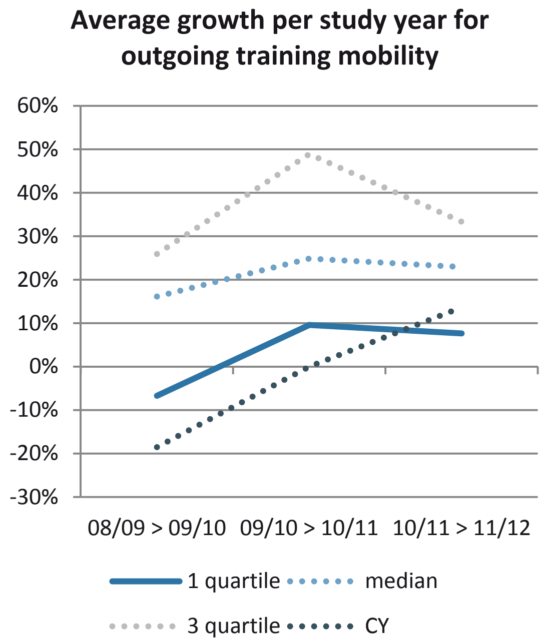
2008/09		2009/10		2010/11		2011/12	
GR	24%	**GR**	28%	**GR**	25%	**GR**	26%
LT	24%	**LT**	16%	**ES**	14%	**LT**	13%
ES	11%	**ES**	12%	**LT**	14%	**RO**	11%
FI	9%	**PL**	8%	**PL**	11%	**PL**	9%
PL	9%	**RO**	8%	**RO**	8%	**ES**	8%

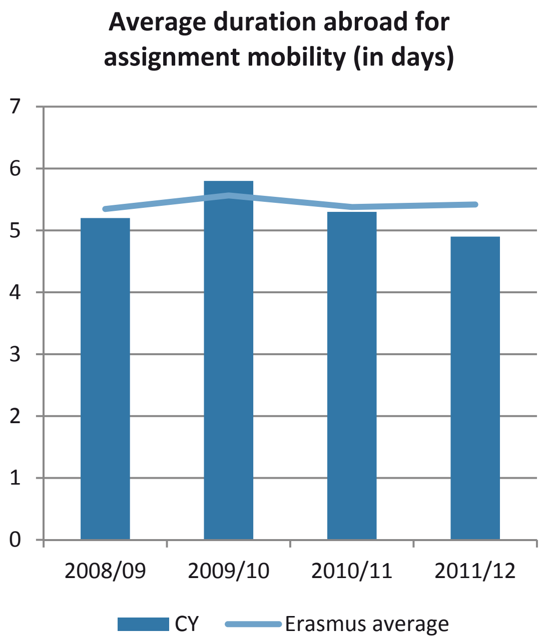
3. Outgoing staff mobility

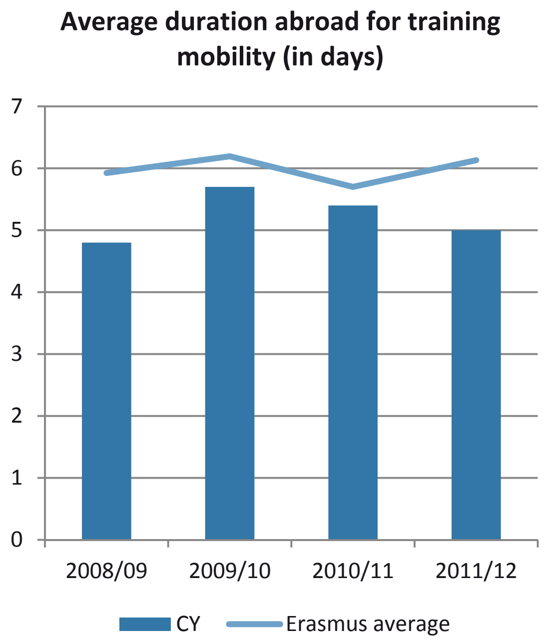
Number of outgoing staff, share of mobile staff going abroad for trainings




Average growth per study year for outgoing assignment mobility
20%
15%
10%
5%
0%
-5%
-10%
-15%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
1 quartile
median
3 quartile
CY


Average growth per study year for outgoing training mobility
60%
50%
40%
30%
20%
10%
0%
-10%
-20%
-30%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
1 quartile
median
3 quartile
CY


Average duration abroad for assignment mobility (in days)
7
6
5
4
3
2
1
0
2008/09
2009/10
2010/11
2011/12
CY
Erasmus average


Average duration abroad for training mobility (in days)
7
6
5
4
3
2
1
0
2008/09
2009/10
2010/11
2011/12
CY
Erasmus average

Top 5 host countries for assignment mobility

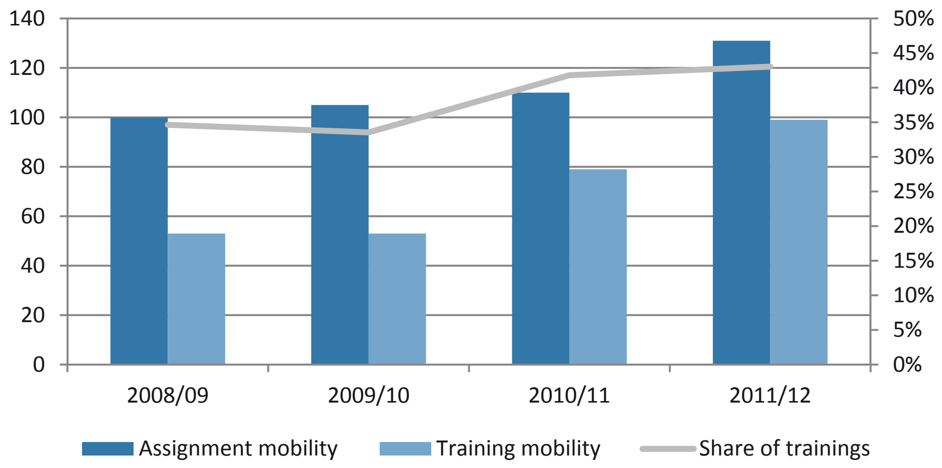
2008/09		2009/10		2010/11		2011/12	
GR	13%	UK	24%	UK	27%	GR	32%
LT	12%	FI	12%	FI	13%	UK	13%
BE	10%	GR	12%	GR	13%	DE	11%
FI	7%	BE	9%	BE	10%	DK	9%
UK	7%	ES	7%	ES	8%	IT	6%

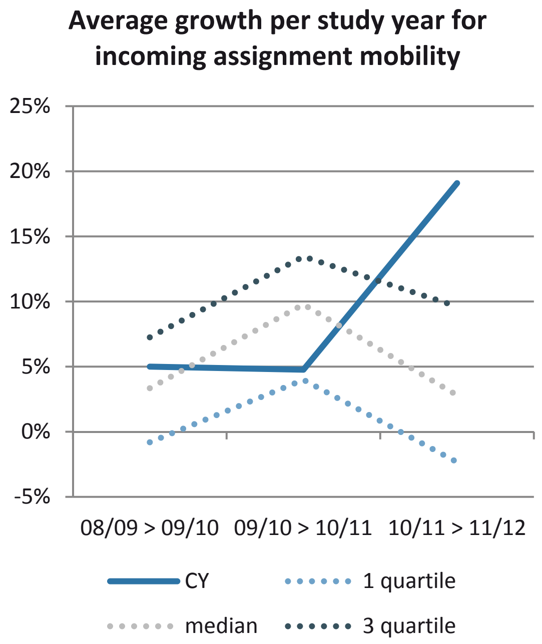
Top 5 host countries for training mobility

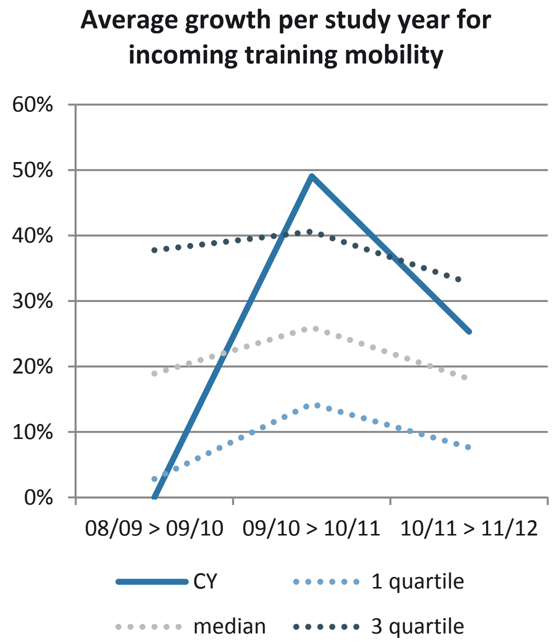
2008/09		2009/10		2010/11		2011/12	
GR	39%	AT	20%	GR	32%	GR	24%
NL	13%	GR	18%	UK	25%	UK	18%
AT	6%	UK	11%	FI	11%	DE	10%
DE	6%	DE	7%	DE	7%	PT	10%
ES	6%	EE	7%	CZ	5%	AT	8%

4. Incoming staff mobility

Number of incoming staff by type of mobility, share of staff coming for trainings







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
GR	19%	**UK**	20%	**GR**	22%	**GR**	31%
UK	15%	**GR**	15%	**UK**	17%	**PL**	15%
FR	8%	**FR**	13%	**CZ**	7%	**UK**	9%
LT	8%	**LT**	10%	**LT**	7%	**CZ**	8%
IT	7%	**PL**	10%	**FR**	6%	**FR**	8%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
PL	17%	**CZ**	13%	**PL**	25%	**GR**	21%
GR	13%	**PL**	13%	**GR**	23%	**CZ**	12%
LV	13%	**SK**	11%	**HU**	8%	**ES**	11%
SK	11%	**UK**	11%	**UK**	6%	**LV**	11%
FI	9%	**ES**	9%	**FI**	5%	**PL**	11%

FRANCE

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of outgoing students has been increasing steadily for both types of mobility since 2008/09, although the average growth per study year for outgoing study mobility has been relatively slow compared to other Erasmus countries. On the other hand, for outgoing placement mobility France has had one of the highest average growth rates except for 2010/11, when the average growth had a very deep downfall compared to the previous study year. The share of mobile students in the total student population in France has been higher compared to the average share in all Erasmus countries, but has not increased significantly during the years of crisis. In 2008/09 the share of mobile students in France was 1.5% and in all Erasmus countries 1.1% on average. In 2011/12 the share increased to 1.5% both in France and in all countries on average. The average duration of studies abroad for students from France has been decreasing, but the duration of placements abroad has been increasing since 2008/09. At the same time, students from France go abroad for studies for a longer period of time compared to students in other Erasmus countries on average, but for a shorter period for placements. There have been no changes to the top destinations for student mobility during the years observed. The number of incoming students has also been increasing since 2008/09, but the average growth per study year has been slowing down for both types of mobility, making France one of the Erasmus countries with the lowest growth rates. The top five sending countries for studies and placements in France have remained almost the same since 2008/09.

Context

Although there have been a few changes in study costs and European grants for students in France, it is not specifically related to the economic crisis. The level of European grant for mobility for studies has been decreasing slightly since 2009 in order to satisfy increasing demand while the grant for placement mobility has been remained the same.

Although tuition fees in France are relatively low compared to other OECD countries, there has been a continuous increase during last few years due to a new national law introduced in 2007 to reinforce autonomy and excellence of French universities. As the general tuition fee is fixed by the law, universities tend to create new fees or increase existing complementary fees. However this trend has not reduced the number of students who access universities. The accessibility of student loans has not been subject to major changes and very few students apply for such loans anyway.

There have been substantial changes in the education system related to mobility opportunities: employability of students has been introduced as one of the main missions of HEIs since 2008 and most of the study programmes include one or several placement periods, including international experiences. To assist students, some HEIs have created dedicated services which provide placement opportunities and manage traineeship agreements. At the same time, the trends in 2012/13 and beyond indicate an increase in outgoing Erasmus placement mobility. Thus, it seems that this policy has affected the share between study mobility and placement mobility.

In the context of the economic crisis, it appears that mobility aspirations for studies abroad are not progressing, as students tend to prioritise other forms of mobility (mobility for placements and diploma mobility). Erasmus experience is more perceived as an opportunity to develop intercultural skills and language skills rather than a way to improve their employability. That is why for the middle class students who do not always benefit from national or regional co-funding, Erasmus experience is not seen as cost-effective. The Erasmus programme is also competing with more advanced forms of mobility opportunities, such as diploma mobility in Europe and the rest of the world. Students can access various bilateral programmes supervised by the French higher education system and most of the time the level of grants in other programmes is higher compared to Erasmus.

Incoming student mobility is affected by the limited study programmes or courses in foreign languages in France (except for business and engineering schools). Nevertheless, in July 2013, the Ministry for Higher Education implemented a law to facilitate the offer in foreign language.

The economic crisis might have reduced part-time job opportunities for students but the national agency does not have statistics or studies to prove it. In 2006, only 20% of the students worked, although this number has increased since then. Foreign students can work with a maximum of 60% of a full-time job in France. As far the national agency knows, the crisis has not had any impact on the access to employment for foreign students.

STAFF MOBILITY

Main trends

The number of staff going abroad in France increased until 2009/10 but has decreased since then. This has turned France from having one of the fastest increases in numbers of outgoing staff to one of the largest decreases (especially for outgoing training mobility). Although most of the countries witnessed positive trends for outgoing staff mobility in 2010/11 compared to the previous study year, the trends in France were already negative. The share of mobile staff in the total staff population in France has been significantly lower compared to the share in all Erasmus countries on average: in 2008/09 the share was 2.6% in France and 5.2% in all Erasmus countries. During the years of crisis the share of mobile staff in France has decreased to 2.4%. The average duration of outgoing staff mobility for assignments has remained almost the same since 2008/09 and has been similar to the average duration for all the Erasmus countries. For trainings abroad the average duration has been decreasing although it has always been slightly higher compared to the Erasmus average. There have been no major changes to the top destinations for outgoing staff mobility in France during the economic downturn. The number of incoming staff has also been increasing in France although the average growth per study year has been slowing down, giving France one of the lowest average growths per study year. The number of incoming assignment mobility has even been decreasing in 2011/12 compared to the previous study year. The top five sending countries for incoming staff mobility have mainly remained the same, with the exception of more staff coming for training from Poland now compared to study year 2008/09.

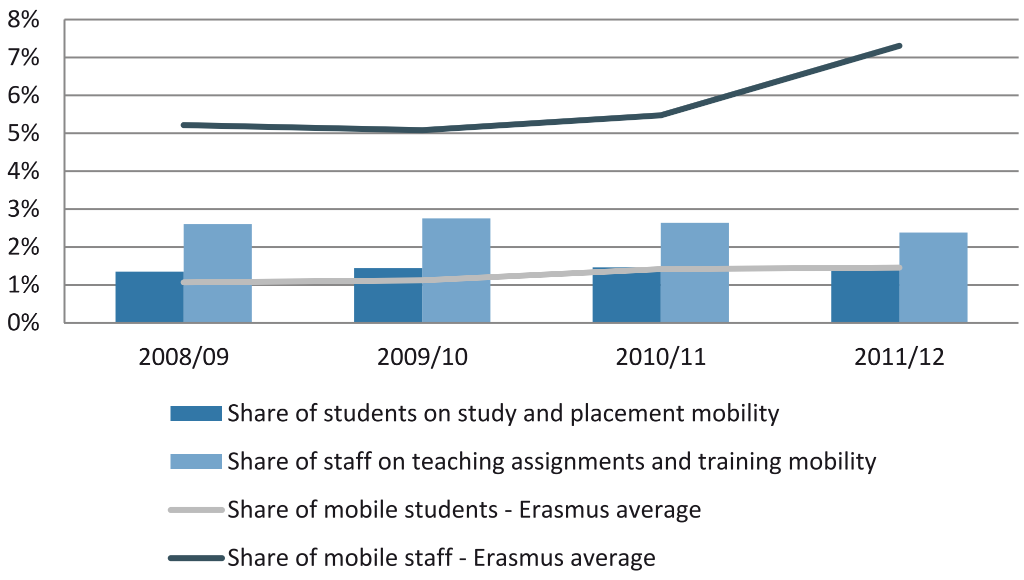
Context

According to the opinion of the national agency, the decrease in staff mobility is not related to the economic crisis, but rather to the fact that staff members have no time to be mobile and there is a lack of communication on this action. A recent study made by the CIEP for the national agency shows that the majority of staff who have not been internationally mobile, did not know this opportunity in the first place.

Older staff members already have international (research) partners and cooperation and they are not that much interested in going for Erasmus mobility. There have also been problems with recognition of the time spent abroad. The decrease of outgoing staff mobility is linked with the level of incoming staff as the trends are comparable. In some cases HEIs try to set up reciprocal staff exchanges like they do with students.

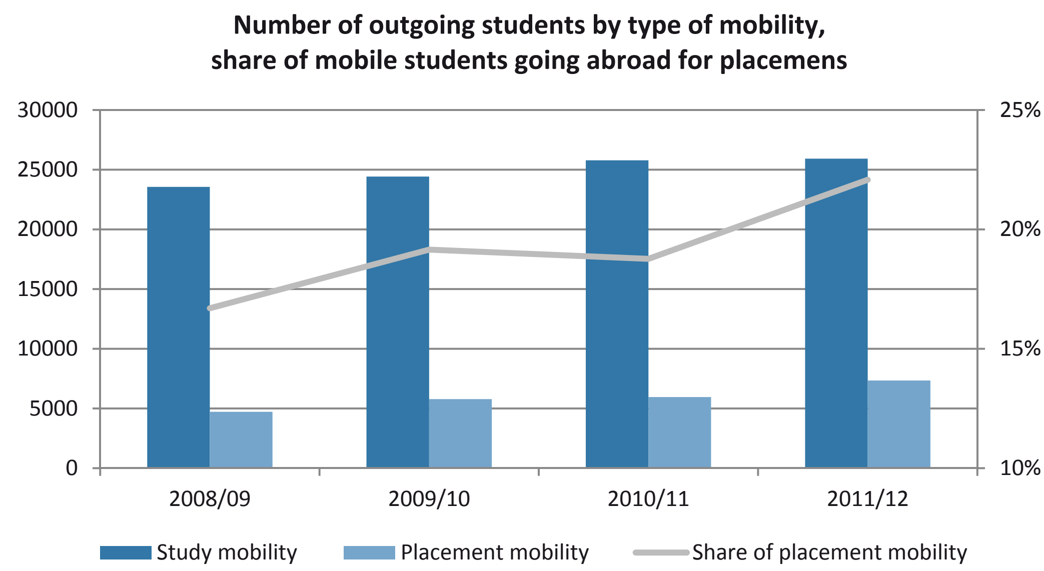
2. Data appendix

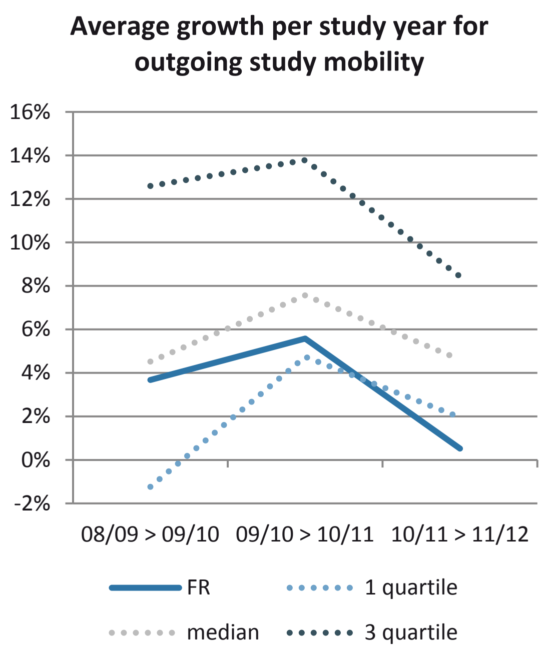
Share of mobile students and staff in France[8]

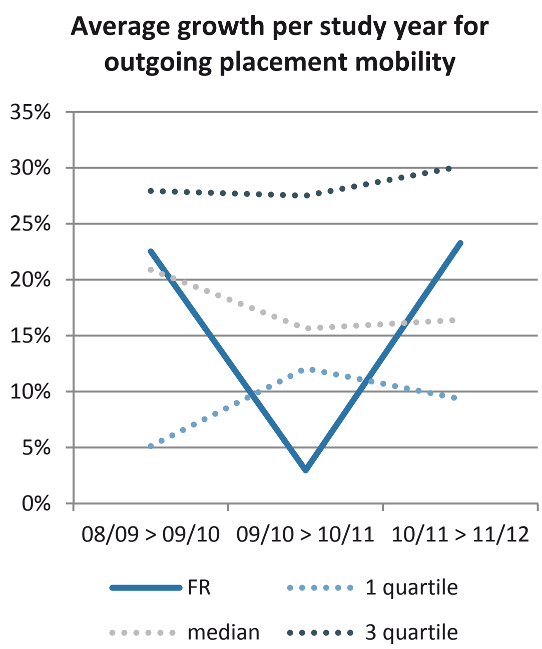


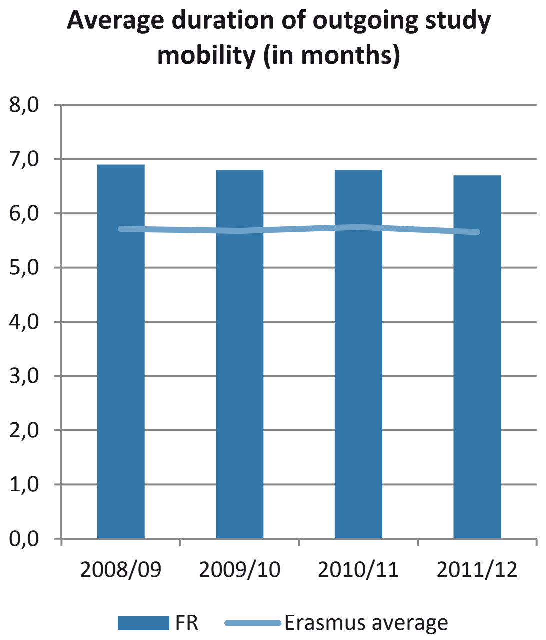
[8] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.

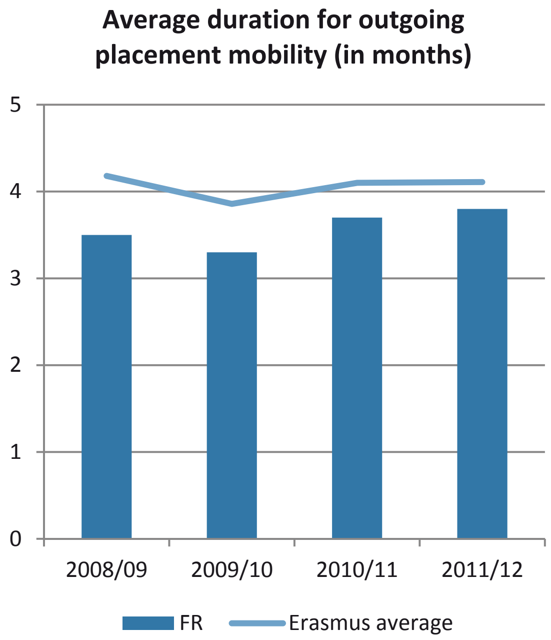
1. Outgoing student mobility











Top 5 host countries for study mobility

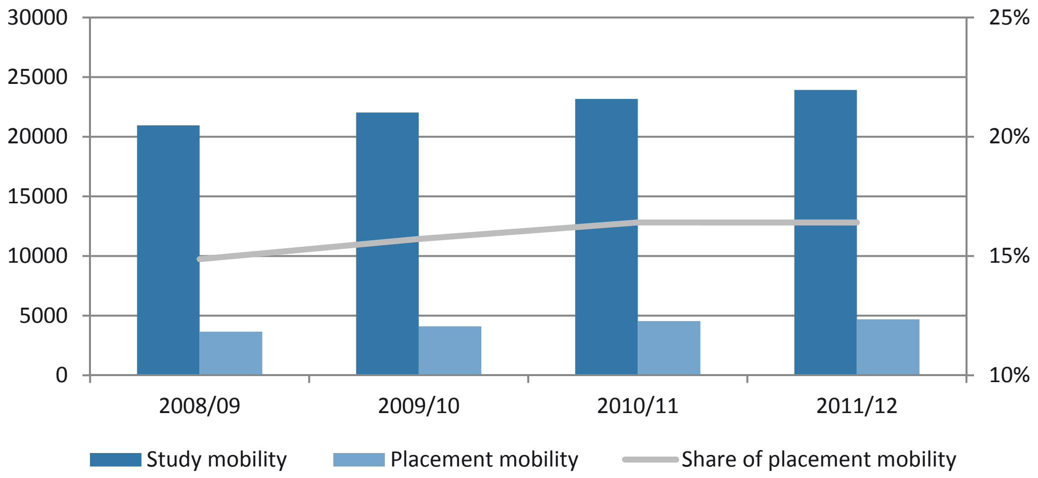
2008/09		2009/10		2010/11		2011/12	
ES	22%	**ES**	22%	**ES**	22%	**ES**	21%
UK	19%	**UK**	19%	**UK**	18%	**UK**	17%
DE	12%	**DE**	11%	**DE**	12%	**DE**	11%
IT	7%	**SE**	7%	**SE**	7%	**SE**	7%
SE	7%	**IT**	6%	**IT**	6%	**IT**	6%

Top 5 host countries for placement mobility

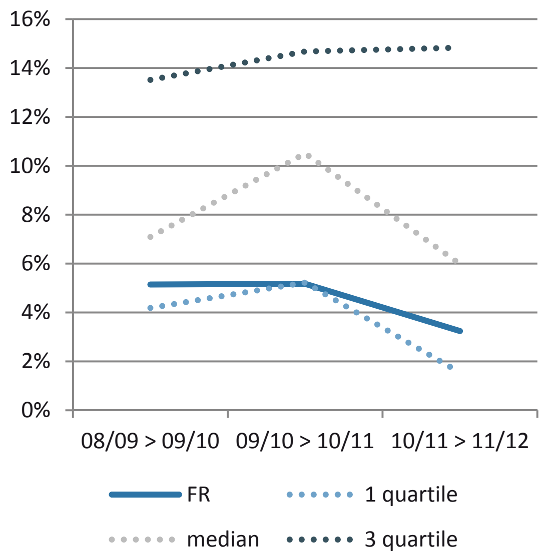
2008/09		2009/10		2010/11		2011/12	
UK	27%	**UK**	29%	**UK**	32%	**UK**	28%
ES	22%	**ES**	23%	**ES**	22%	**ES**	20%
DE	12%	**DE**	9%	**DE**	11%	**DE**	11%
BE	7%	**BE**	7%	**BE**	7%	**BE**	8%
NL	6%	**IE**	5%	**IE**	5%	**IE**	6%

2. Incoming student mobility

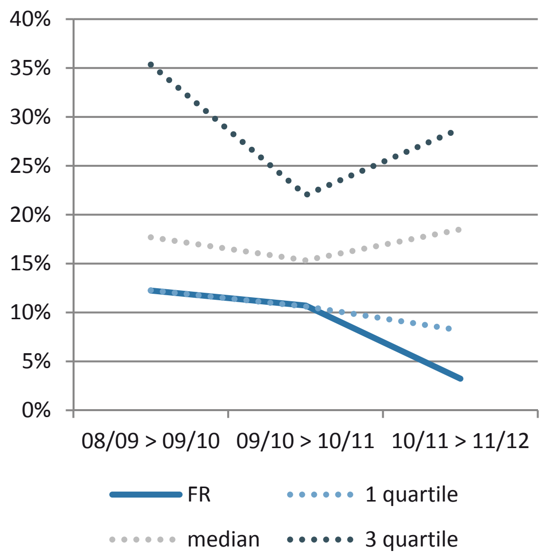
Number of incoming students by type of mobility, share of students coming placements



Average growth per study year for incoming study mobility



Average growth per study year for incoming placement mobility



Top 5 sending countries for study mobility

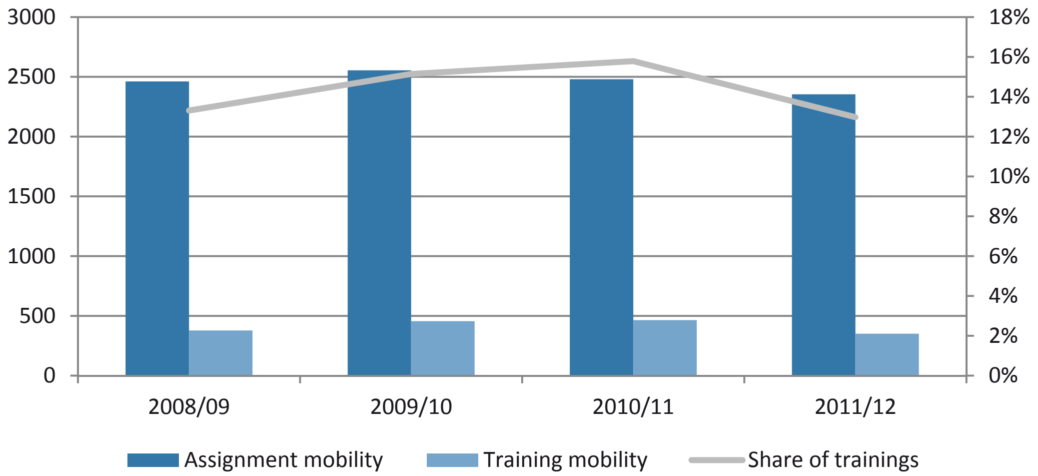
2008/09		2009/10		2010/11		2011/12	
DE	20%	**DE**	20%	**DE**	20%	**DE**	20%
ES	16%	**ES**	17%	**ES**	18%	**ES**	17%
IT	13%	**IT**	14%	**IT**	13%	**IT**	13%
UK	10%	**UK**	11%	**UK**	11%	**UK**	10%
PL	5%	**PL**	5%	**PL**	4%	**PL**	4%

Top 5 sending countries for placement mobility

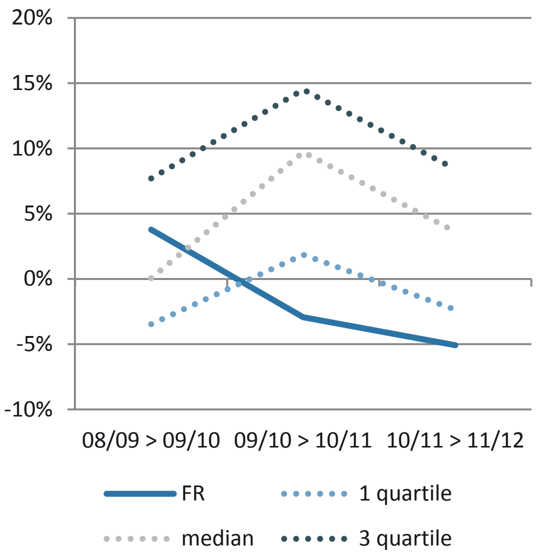
2008/09		2009/10		2010/11		2011/12	
UK	38%	**UK**	37%	**UK**	38%	**UK**	38%
DE	17%	**DE**	17%	**DE**	15%	**DE**	13%
ES	10%	**ES**	10%	**ES**	10%	**ES**	11%
BE	7%	**BE**	7%	**BE**	6%	**IT**	7%
IT	5%	**IT**	5%	**IT**	6%	**BE**	6%

3. Outgoing staff mobility

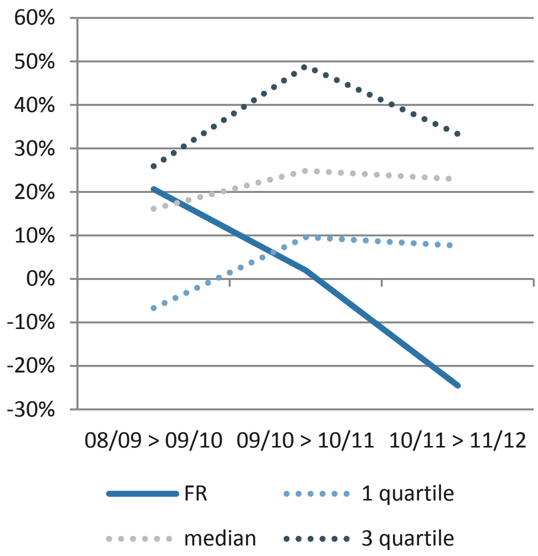
Number of outgoing staff by type of mobility, share of mobile staff going abroad for trainings



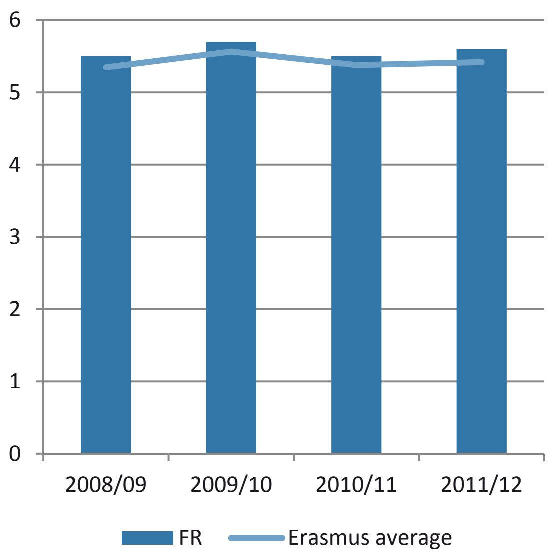
Average growth per study year for outgoing assignment mobility



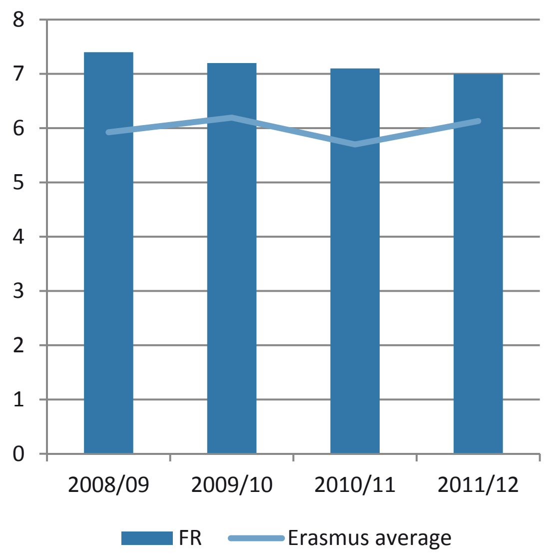
Average growth per study year for outgoing placement mobility



Average duration abroad for assignment mobility (in days)



Average duration abroad for outgoing training mobility (in days)



Top 5 host countries for assignment mobility

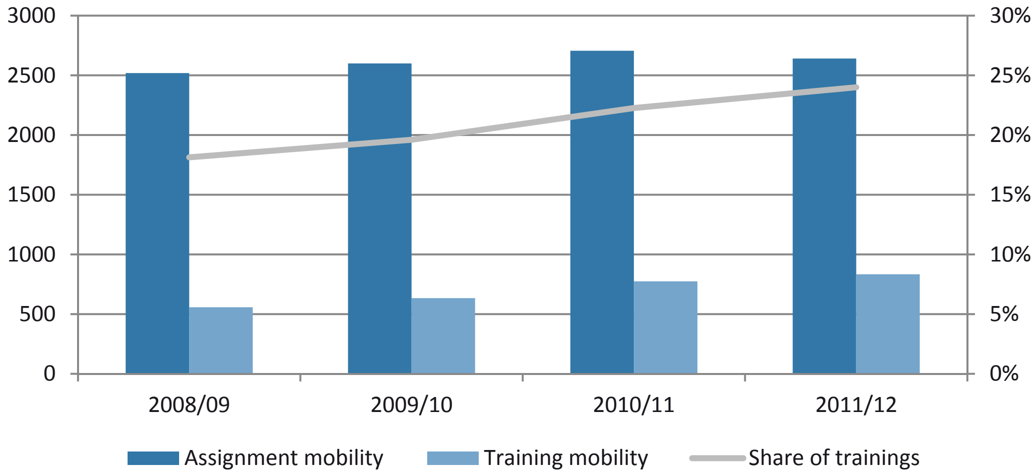
2008/09		2009/10		2010/11		2011/12	
ES	14%	IT	15%	ES	14%	ES	14%
IT	13%	ES	13%	RO	12%	IT	13%
RO	13%	RO	12%	IT	12%	RO	11%
PL	9%	PL	8%	PL	8%	DE	8%
DE	8%	DE	8%	DE	8%	PL	8%

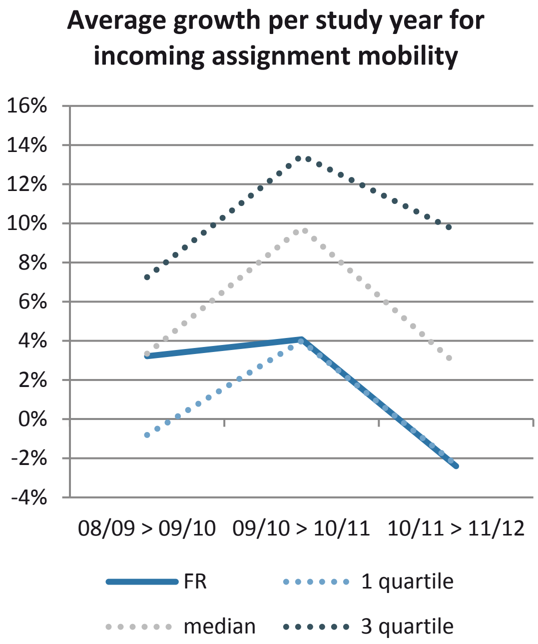
Top 5 host countries for training mobility

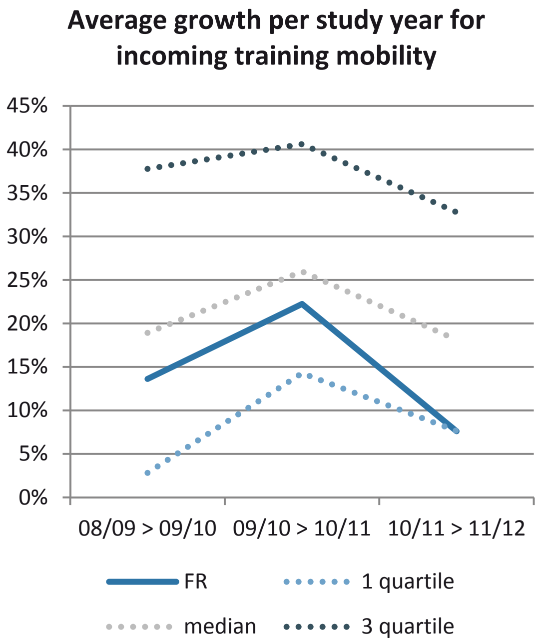
2008/09		2009/10		2010/11		2011/12	
ES	21%	ES	18%	ES	19%	ES	19%
UK	16%	UK	15%	UK	12%	UK	14%
DE	10%	DE	8%	DE	11%	DE	10%
IT	7%	IT	7%	IT	10%	IT	7%
BE	7%	IE	5%	FI	6%	BE	7%

4. Incoming staff mobility

Number of incoming staff by type of mobility, share of staff coming for trainings







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
ES	16%	**ES**	16%	**ES**	17%	**ES**	16%
RO	12%	**RO**	12%	**RO**	12%	**RO**	11%
DE	10%	**DE**	11%	**DE**	10%	**DE**	10%
IT	10%	**IT**	9%	**PL**	9%	**PL**	10%
PL	8%	**PL**	8%	**IT**	8%	**IT**	9%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	15%	**ES**	14%	**ES**	17%	**PL**	17%
PL	11%	**RO**	13%	**PL**	14%	**RO**	13%
BE	9%	**PL**	12%	**RO**	11%	**ES**	13%
RO	8%	**DE**	9%	**FI**	7%	**BE**	7%
FI	7%	**FI**	8%	**IT**	7%	**IT**	5%

GERMANY

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of outgoing students in Germany has been growing steadily since 2008/09 and the average growth per study year has been increasing during the years of economic crisis, especially in 2011/12 compared to the previous study year, whereas most of the Erasmus countries witnessed a downturn in the growth rates. Germany stands out as one of the countries with the fastest growing numbers for outgoing study mobility, although for outgoing placement mobility the average growth has been relatively slow in international comparison. At the same time the duration of studies abroad has been decreasing and for placements it has remained the same since 2008/09. Nevertheless students from Germany still spend a longer period of time abroad for studies and placements compared to students in other Erasmus countries on average. There have been no changes in the top destination countries for outgoing student mobility during the years of crisis. The number of incoming students in Germany has also been increasing although in 2011/12 the average growth for placement mobility slowed down compared to the previous study year. Similarly to outgoing study mobility, the number of students coming to Germany for study mobility has been growing relatively fast in 2011/12 compared to the previous study year, whereas most of the Erasmus countries witnessed a downturn in the growth rates. During the years of economic crisis, the share of students coming to Germany from Spain has been increasing the most and the share of students coming from the UK, Austria and Poland have been decreasing.

Background

The general feeling by the National Agency is that there have been no negative effects of the crisis on Erasmus mobility in Germany so far. The Erasmus budget for Germany decreased in 2009/10 and then started to increase again so in 2011/12 the budget was higher than in 2008/09 for the first time. Despite the financial situation in 2009/10 and 2010/11, Germany had an increase in outgoing student and staff mobility due to a reduction of the monthly grant amount. As the budget rose significantly in 2012/13, the mobility numbers are expected to further increase. As of 2014/15, under the new EU education programme Erasmus+ student and staff mobility will probably go up due to a remarkable budget increase and new opportunities for students to be mobile within Europe and even beyond. In addition, especially placement mobility is very likely to increase because of a change in the required minimum period abroad from 3 months to 2 months. Irrespective of existing and future funding schemes, more and more students wish to acquire international competences abroad to improve their chances on the labour market.

There have been substantial changes in the accessibility and availability of student grants that support and promote mobility. For outgoing student mobility the situation has improved with more national funds for existing mobility programmes and the introduction of a new national mobility scheme for students called PROMOS (complementary to Erasmus; funded by the Federal Ministry of Education and Research and administered by DAAD). Also the new *Deutschland-Stipendium* scheme can be used for transnational student mobility. There have been also substantial changes to the study costs as general tuition fees for studies have been abolished by almost all *Bundesländer*. Nevertheless, according to a study in 2013 the main obstacles to study abroad still are financial aspects (additional financial burden, prolongation of study time due to lack of recognition).

There have been no major changes in the economy or society that might have had a negative impact on outgoing or incoming mobility or would affect study or living conditions. On the contrary, the continuing good economic situation in Germany seems to attract a growing number of international students and graduates from certain countries. Some German students feel that an increased study work load due to the BA/MA reform has a negative effect on their decision to work in parallel to their studies. At the same time there have been positive developments for Non-EU students as they are now allowed to work 120 full days (or 240 half-days) per year in parallel to their studies without permission by the central labour office.

STAFF MOBILITY

Main trends

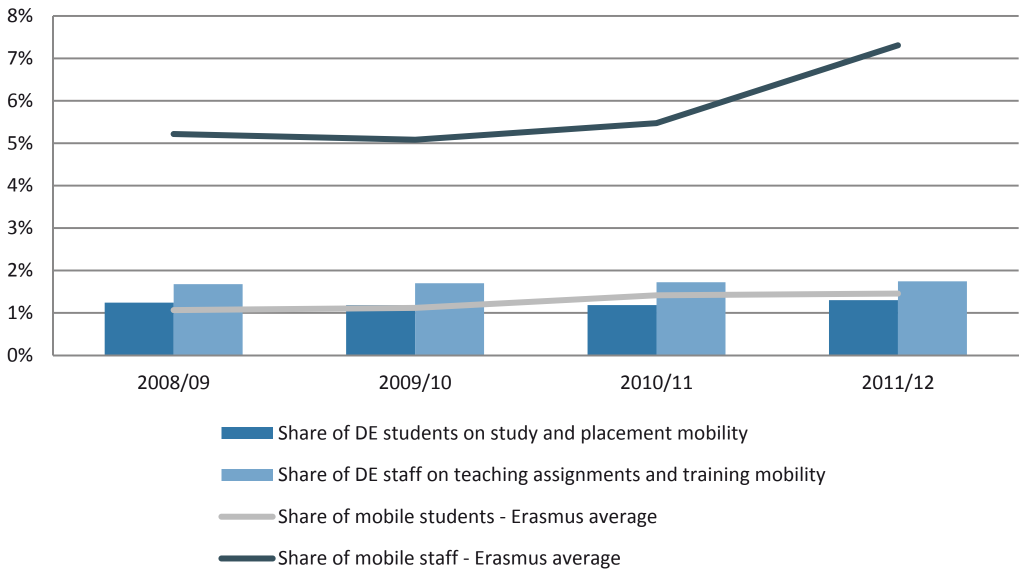
Although the numbers of outgoing staff have been increasing steadily since 2008/09 in Germany, the average growth per study year has been rather slowing down. When in 2009/10 Germany was one of the countries with the highest average growth rates for outgoing staff mobility, it has become more similar to countries with median average growth in 2011/12 compared to the previous study year. The average duration of staff mobility abroad has in general increased since 2008/09 in Germany and compared to the average duration for other Erasmus countries outgoing staff from Germany stays abroad for a longer period of time. The top five destination countries for staff from Germany have not changed much during the years of economic crisis although the share of staff going to Spain for trainings has been decreasing. The numbers of incoming staff have also been increasing although the number of staff coming to Germany for trainings saw a small decrease in 2009/10 compared to the previous study year. In international comparison Germany has been one of the countries with the lowest average growth per study year for incoming assignment mobility. There have been no changes to the top five home countries for incoming staff mobility in Germany during the years of crisis.

Background

There have been no changes to the working conditions or salaries of German academic or non-academic staff that might negatively influence transnational mobility.

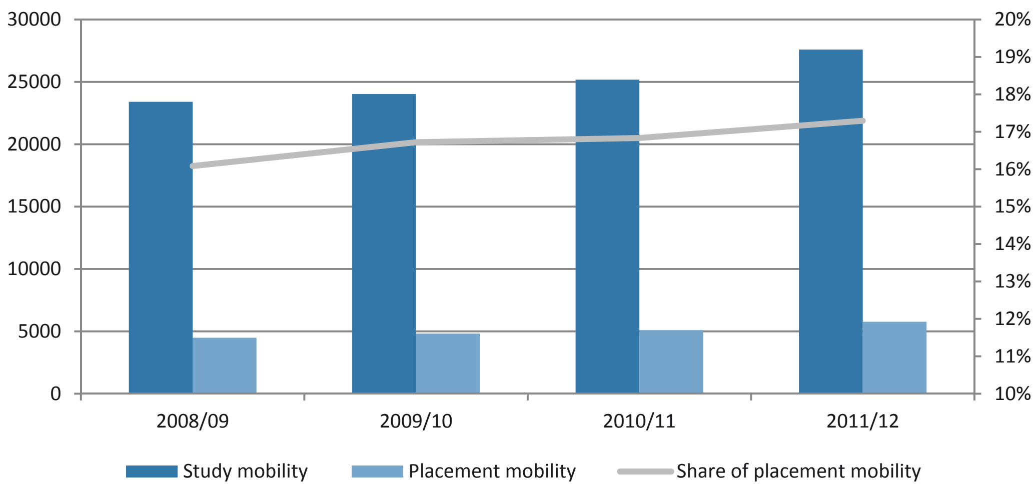
2. Data appendix

Share of mobile students and staff in Germany[9]

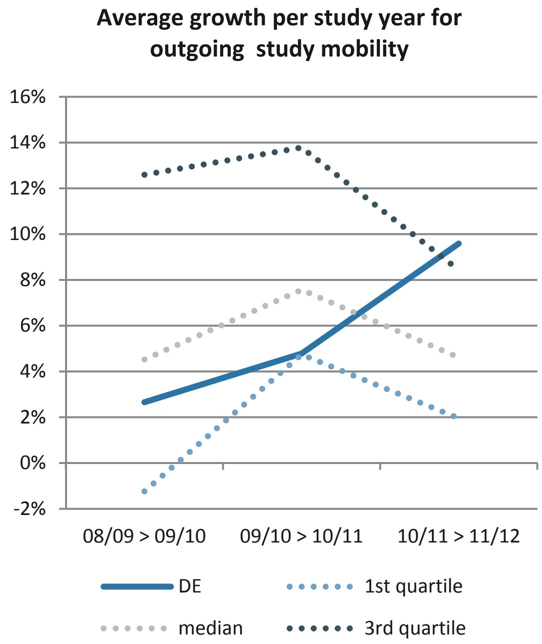


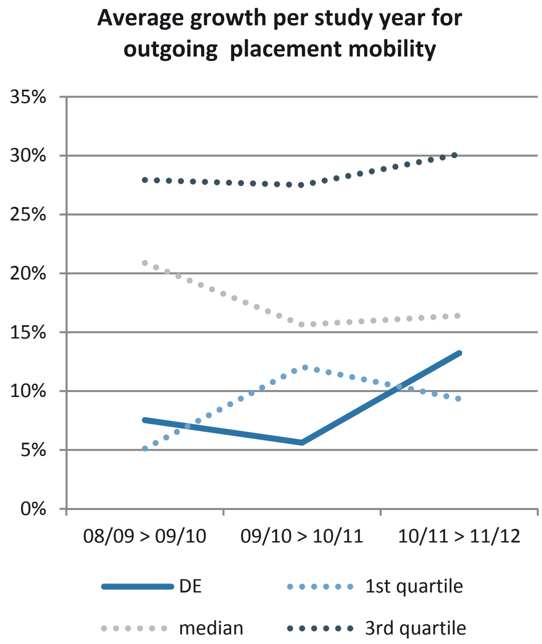
1. Outgoing student mobility

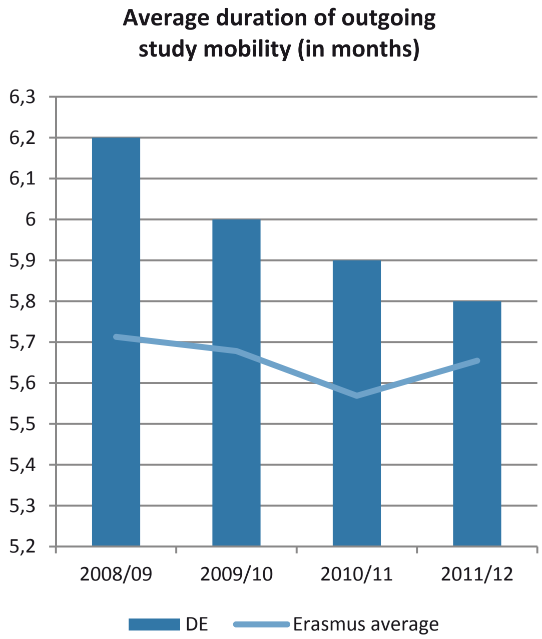
Number of outgoing students by type of mobility, share of mobile students going for placements abroad

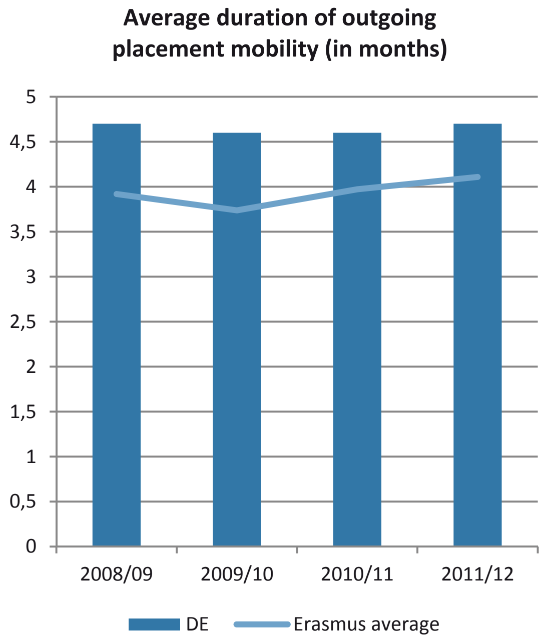


[9] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.


Average growth per study year for outgoing study mobility
16%
14%
12%
10%
8%
6%
4%
2%
0%
-2%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
DE
1st quartile
median
3rd quartile


Average growth per study year for outgoing placement mobility
35%
30%
25%
20%
15%
10%
5%
0%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
DE
1st quartile
median
3rd quartile


Average duration of outgoing study mobility (in months)
6,3
6,2
6,1
6
5,9
5,8
5,7
5,6
5,5
5,4
5,3
5,2
2008/09
2009/10
2010/11
2011/12
DE
Erasmus average


Average duration of outgoing placement mobility (in months)
5
4,5
4
3,5
3
2,5
2
1,5
1
0,5
0
2008/09
2009/10
2010/11
2011/12
DE
Erasmus average

Top 5 host countries for study mobility

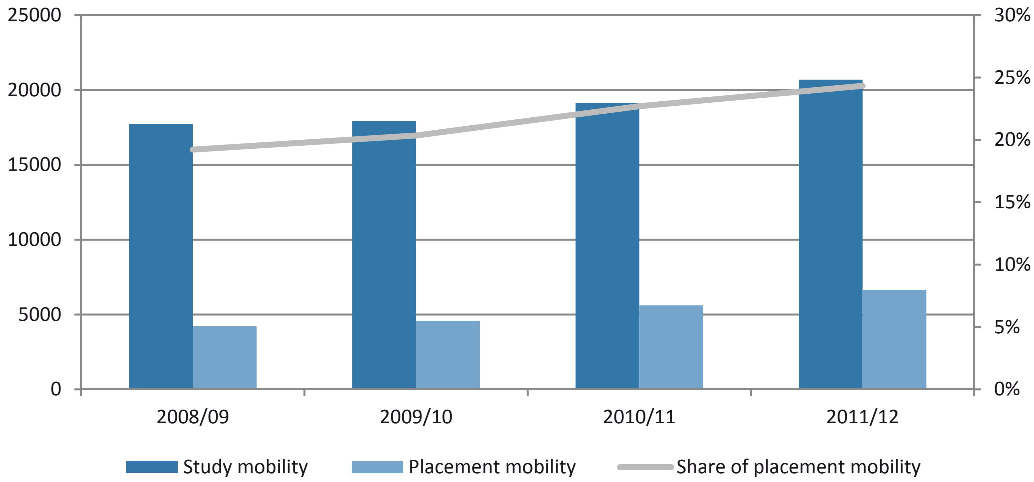
2008/09		2009/10		2010/11		2011/12	
ES	20%	**ES**	21%	**ES**	20%	**ES**	19%
FR	18%	**FR**	18%	**FR**	18%	**FR**	17%
UK	13%	**UK**	12%	**UK**	12%	**UK**	11%
SE	9%	**SE**	9%	**SE**	9%	**SE**	9%
IT	7%	**IT**	6%	**IT**	5%	**IT**	6%

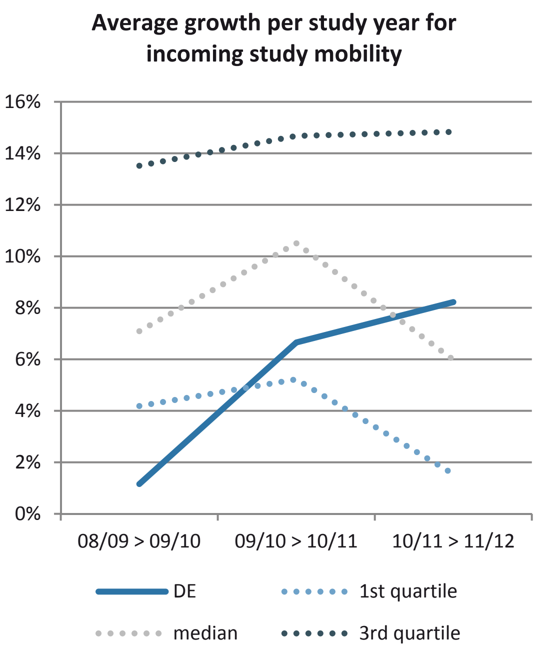
Top 5 host countries for placement mobility

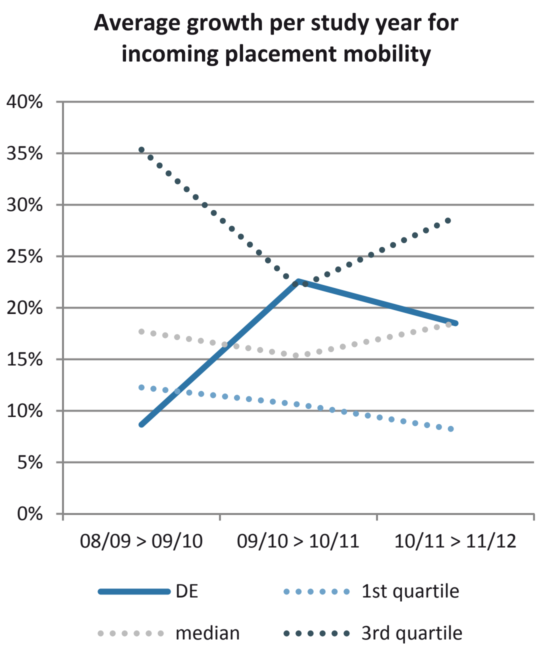
2008/09		2009/10		2010/11		2011/12	
UK	21%	**UK**	21%	**UK**	22%	**UK**	21%
ES	20%	**ES**	19%	**ES**	19%	**ES**	17%
FR	14%	**FR**	14%	**FR**	13%	**FR**	11%
AT	5%	**IT**	5%	**AT**	6%	**CH**	10%
NL	5%	**AT**	5%	**NL**	5%	**AT**	5%

2. Incoming student mobility

Number of incoming students by type of mobility, share of students coming for placements







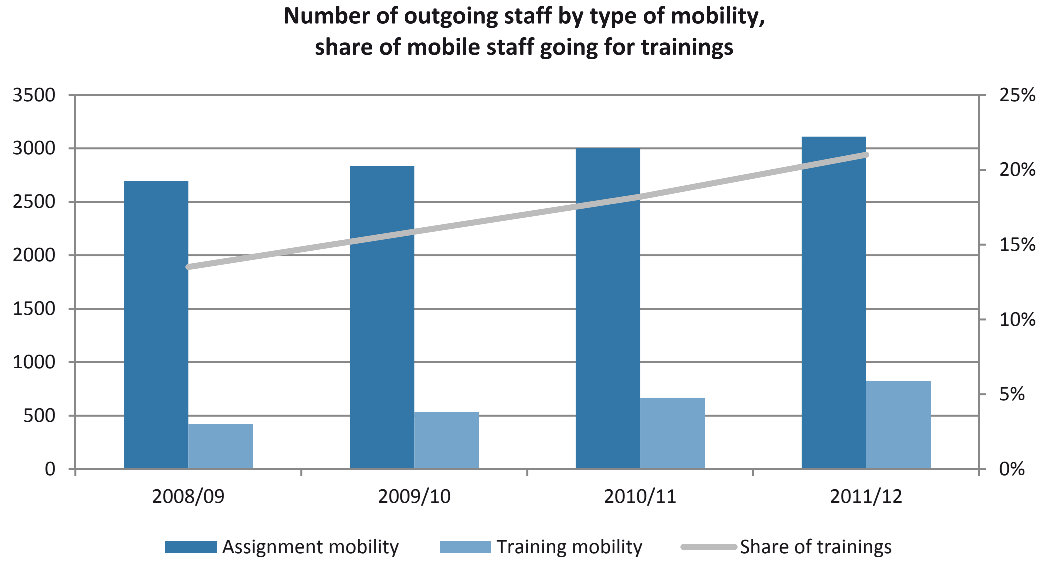
Top 5 sending countries for study mobility

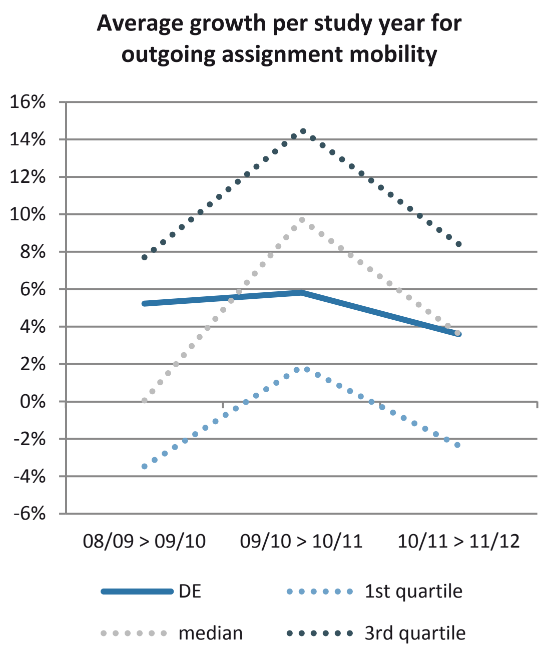
2008/09		2009/10		2010/11		2011/12	
FR	16%	**ES**	16%	**ES**	17%	**ES**	18%
ES	15%	**FR**	15%	**FR**	16%	**FR**	14%
PL	11%	**IT**	10%	**IT**	10%	**IT**	10%
IT	9%	**PL**	10%	**PL**	8%	**PL**	8%
TR	7%	**TR**	8%	**TR**	8%	**TR**	8%

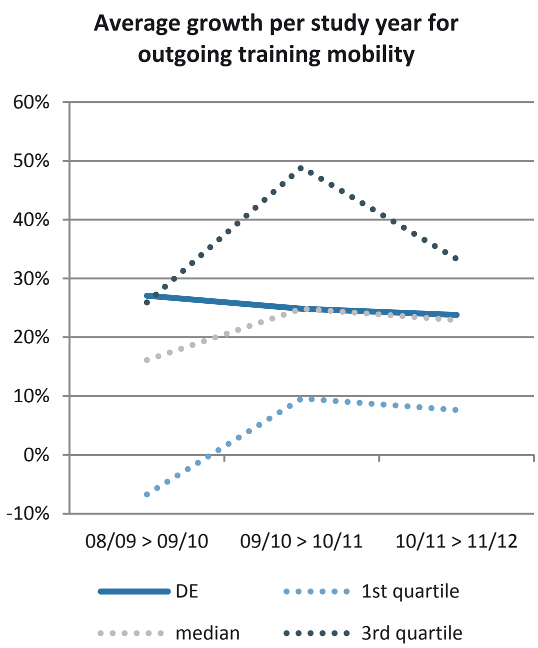
Top 5 sending countries for placement mobility

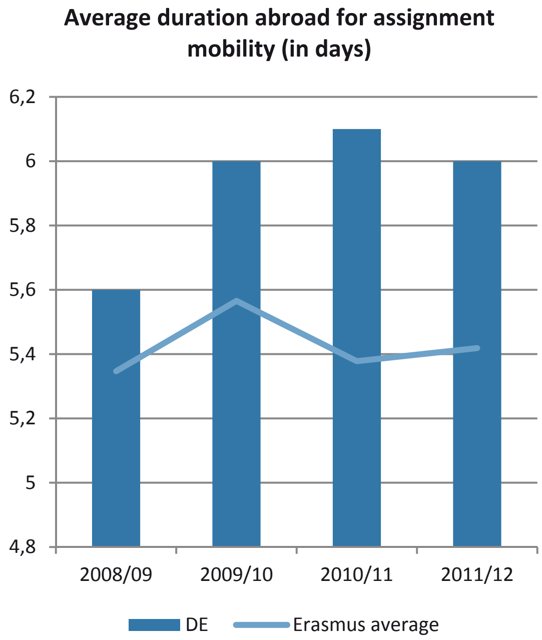
2008/09		2009/10		2010/11		2011/12	
UK	16%	**UK**	14%	**UK**	14%	**ES**	13%
FR	13%	**FR**	12%	**ES**	11%	**UK**	12%
AT	12%	**AT**	10%	**FR**	11%	**FR**	12%
ES	9%	**ES**	10%	**AT**	10%	**AT**	9%
PL	8%	**NL**	9%	**NL**	8%	**PL**	8%

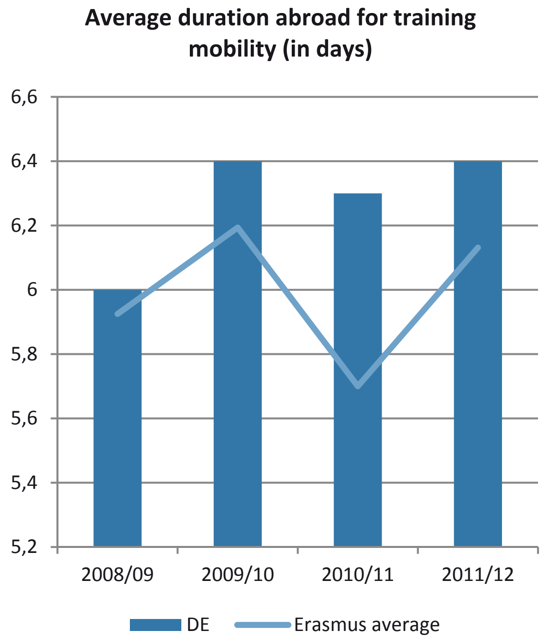
3. Outgoing staff mobility











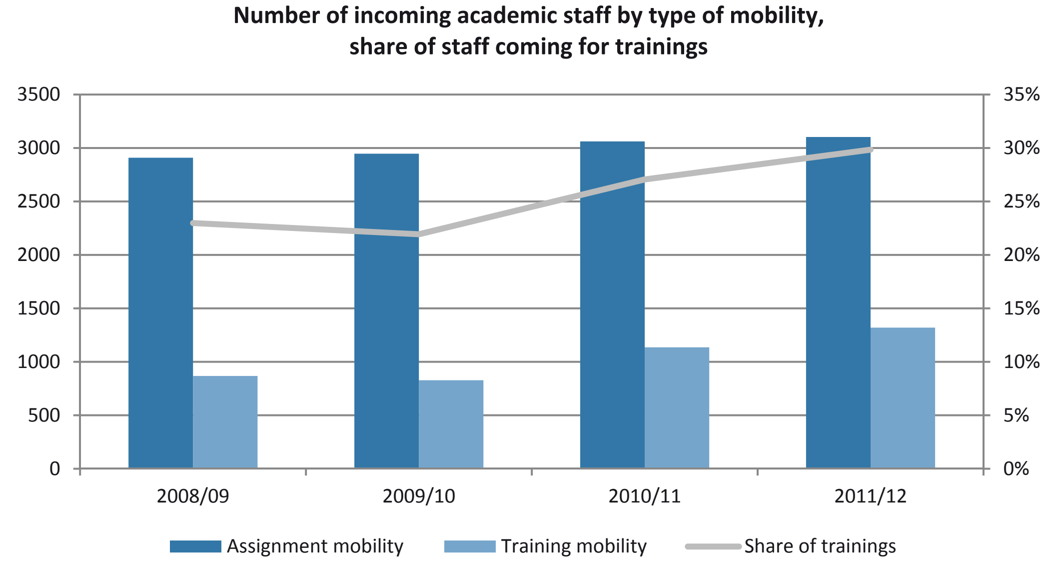
Top 5 host countries for assignment mobility

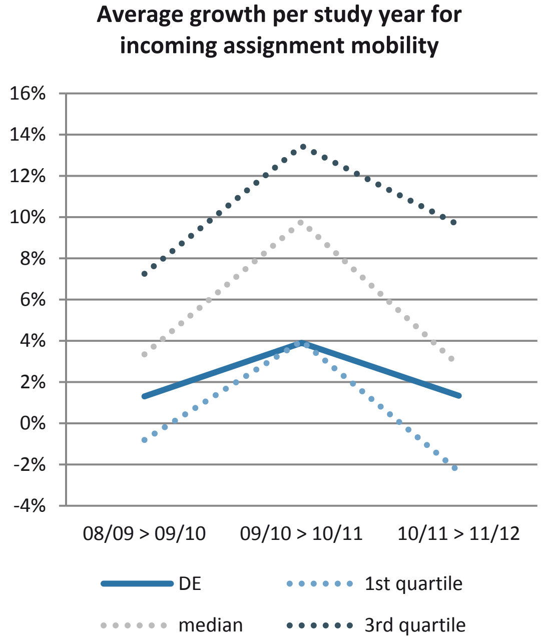
2008/09		2009/10		2010/11		2011/12	
ES	10%	**PL**	10%	**PL**	11%	**PL**	11%
PL	10%	**FR**	10%	**ES**	11%	**ES**	10%
FR	10%	**ES**	10%	**FR**	9%	**FR**	9%
IT	8%	**IT**	8%	**IT**	8%	**IT**	8%
UK	7%	**UK**	7%	**UK**	7%	**UK**	7%

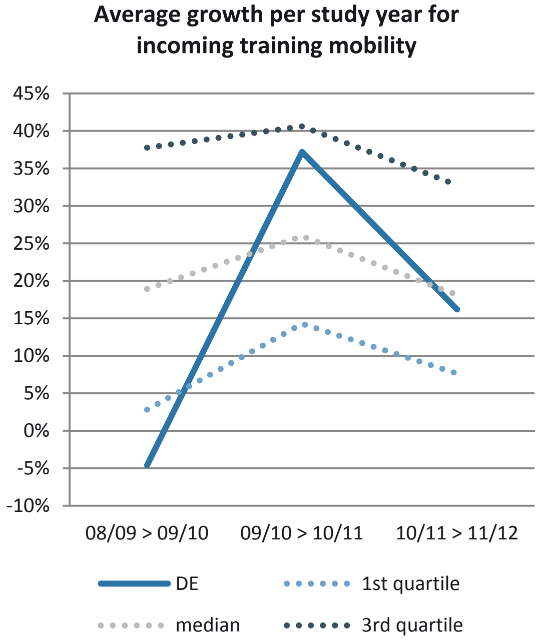
Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	17%	**UK**	15%	**ES**	17%	**UK**	14%
UK	14%	**FR**	10%	**UK**	11%	**NL**	12%
NL	9%	**ES**	10%	**DK**	10%	**ES**	12%
FI	8%	**FI**	10%	**FI**	9%	**FI**	9%
AT	6%	**NL**	10%	**SE**	7%	**SE**	7%

4. Incoming staff mobility







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
PL	16%	**PL**	15%	**PL**	15%	**PL**	17%
ES	10%	**ES**	10%	**ES**	11%	**ES**	9%
CZ	9%	**CZ**	8%	**UK**	8%	**UK**	8%
FR	7%	**UK**	7%	**CZ**	8%	**CZ**	8%
UK	7%	**FR**	7%	**FR**	7%	**FR**	6%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
PL	19%	**PL**	18%	**PL**	18%	**PL**	21%
TR	11%	**ES**	11%	**FI**	11%	**ES**	12%
ES	9%	**TR**	11%	**ES**	11%	**TR**	9%
FI	8%	**FI**	7%	**TR**	9%	**FI**	5%
CZ	7%	**HU**	6%	**LV**	5%	**LV**	5%

GREECE

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of outgoing students has been increasing steadily in Greece during the crisis although the growth rate has been relatively slow, especially for study mobility. The average growth increased every study year until 2010/11 and then slowed down for both types of student mobility. Compared to other Erasmus countries, Greece has had one of the lowest average growths per study year for study mobility. It used to have one of the fastest average growths per study year for placement mobility until 2010/11, but since then has had a slower average growth rate. The share of mobile students in the total student population in Greece has been relatively low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 0.5% in Greece while in all Erasmus countries the average share was 1.1%. During the years of economic crisis the share of mobile students has been increasing to 0.6% in Greece and 1.5% in all Erasmus countries on average by 2011/12. The average duration of studies and placements abroad has been mainly increasing since 2008/09, although in comparison to the average duration of outgoing mobility for all Erasmus countries students from Greece spend less time abroad for studies and more time abroad for placements. The top five host countries for studies and placements for students from Greece have mainly remained the same during the crisis, although Germany has become a slightly more popular destination and Cyprus less popular for placement mobility. The number of incoming students increased until 2009/10 and since then has been decreasing for study mobility, starting to increase again for placement mobility in 2011/12 compared to the previous study year. Nevertheless, in international comparison Greece has had one of the lowest average growth rates per study year during the economic crisis. The top five sending countries for studies and placements in Greece have remained mainly the same, although the share of students coming from Latvia to Greece for placement mobility has seen a noticeable increase in 2011/12 compared to the previous study years.

Context

There have been major cuts in budgets and salaries in HEIs, many of them have merged and many departments have been closed. According to the national agency, in spite of the financial crisis, outgoing Erasmus mobility numbers are still increasing because it is seen as an opportunity by students and secondly because the rates set by the national agency are realistic. Students still go abroad for studies and placements, but they stay abroad for a shorter period and/or choose smaller cities and towns with lower living costs, counting also on finding a part-time job. The trends in 2012/13 and beyond show a steady increase in outgoing study mobility and a larger increase is expected in placement mobility.

There have been moderate changes to the accessibility of grants in Greece: state grants are offered only for postgraduate studies (access via examinations since 2012). The level of the Erasmus grant is relatively high (€450) and this has not changed significantly during the crisis. Still, it is not enough to cover all expenses and students greatly rely on their parents. There has never been any national co-funding for Erasmus students. HEIs used to co-fund some cases of outgoing Erasmus students (rewarding excellence and taking into account social-economic factors), but this is no longer available due to the financial cuts. There are no student loans in Greece so far. Students have no study costs for the first cycle (undergraduate studies), all universities are public. However, now there are low fees for the majority of the second cycle studies (Master's degrees except MBAs, which are rather expensive).

The rise in unemployment rate up to 60% among young people leaves almost no opportunities for temporary work for local or incoming students. In the rare case that they find a temporary job, the payment is so small that it does not cover their expenses. Families used to support their children financially, but it has become more difficult now. This has had a positive increase in placement mobility as students see this as an opportunity to find a job abroad. On the other hand, many students stay abroad after their placement causing a large brain-drain effect in Greece.

The interest of incoming students has decreased mainly due to the student sit-ins (especially in 2011), riots especially in the capital, fear of Greece exiting the euro zone and negative publicity in the media in certain countries. Benefits that used to be offered for free (meals and accommodation) for incoming students are now offered for a low charge. Another reason that affects incoming mobility is the limited number of courses available in English. The increase in incoming placement mobility in times when the unemployment rate is high in Greece can be explained by the fact that employers do not have to pay salaries for them (or only very low salaries), also students from abroad have better language skills (e.g. Russian) that are needed by some employers in Greece.

STAFF MOBILITY

Main trends

The number of outgoing staff in Greece has been increasing during the crisis, especially in 2010/11, when the average growth per study year was one of the highest in all Erasmus countries compared to the previous study year. Although the average growth has started to slow down since, it is still relatively high in comparison to other countries. The average duration of staff mobility abroad has also been increasing since 2008/09 and compared to their colleagues in other Erasmus countries, staff from Greece stay abroad for a longer period of time on average. The top five destinations for mobile staff from Greece have mainly remained the same during the economic crisis, although the share of staff going to the UK or France for training has been decreasing.

The number of incoming staff was increasing until 2010/11 and the average growth per study year was similar to the median growth of all Erasmus countries, but in 2011/12 the number of staff coming to Greece for assignments actually decreased and the number for incoming trainings remained similar compared to the previous study year. Although the average growth in incoming mobility numbers slowed down in most of the Erasmus countries that study year, the decrease was sharper in Greece. There have been some changes to the top five sending countries for incoming staff mobility as the share of staff coming from Spain and Cyprus has been decreasing, on the other hand the share of staff coming from Poland has been increasing.

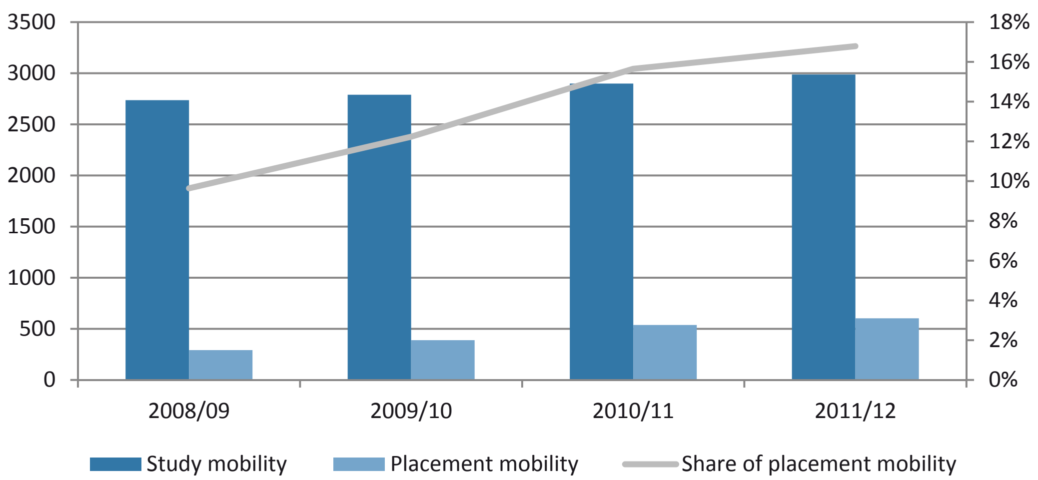
Context

There have been substantial changes in the salaries and working conditions of academic staff in Greece: a 40% salary decrease and substantial cuts in the number of staff. HEIs used to offer co-funding for staff mobility, but this has stopped now as they have suffered large budget cuts, large mergers of institutions and departments and there are no research funds available. For these reasons staff chose (and continue to choose) to go abroad for networking on their research projects, for discussions and exchange of ideas to not feel isolated.

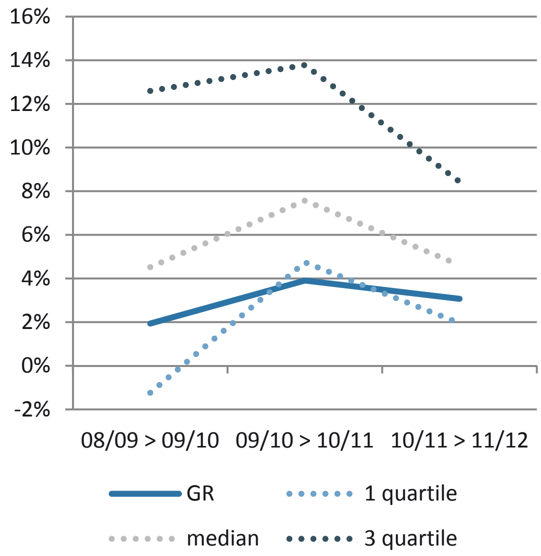
2. Data appendix

1. Outgoing student mobility

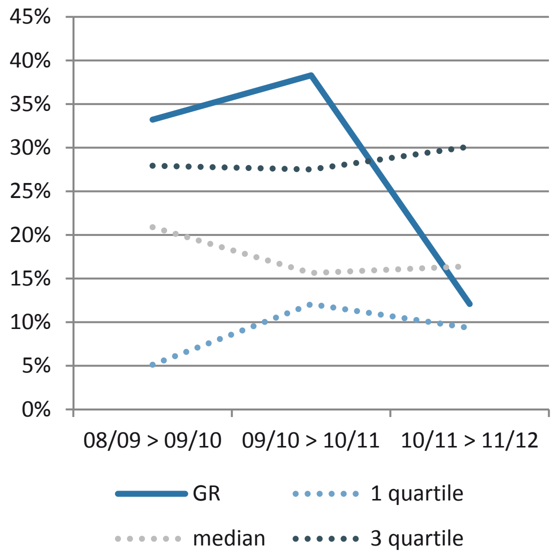
Number of outgoing students by type of mobility, share of mobile students going abroad for placements



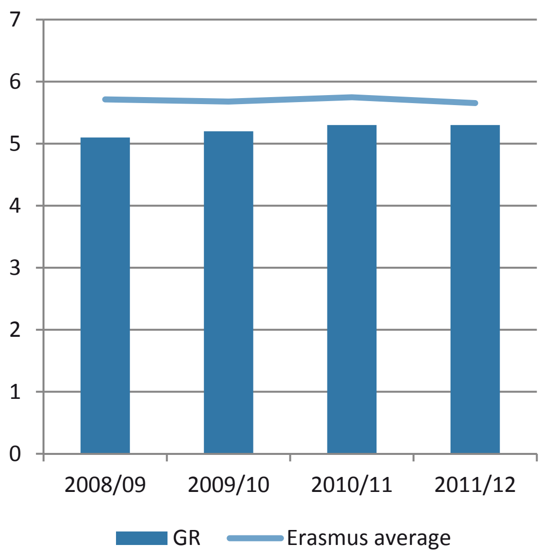
Average growth per study year for outgoing study mobility



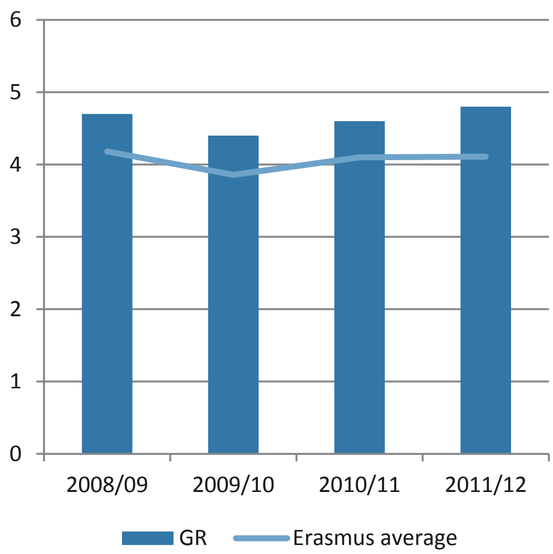
Average growth per study year for outgoing placement mobility



Average duration abroad for outgoing study mobility (in months)



Average duration abroad for placement mobility (in months)



Top 5 host countries for study mobility

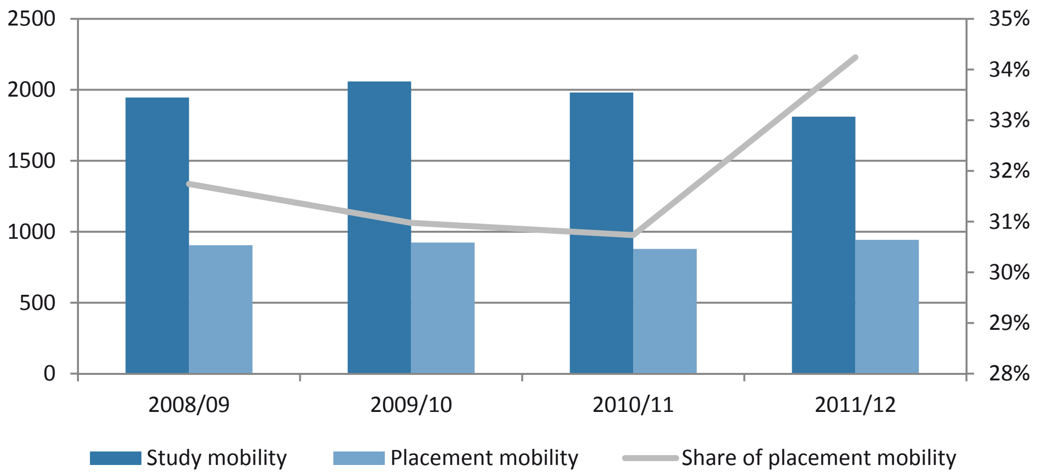
2008/09		2009/10		2010/11		2011/12	
FR	18%	FR	16%	FR	16%	FR	17%
ES	16%	ES	16%	ES	16%	ES	14%
DE	12%	DE	13%	DE	13%	DE	14%
IT	10%	IT	8%	IT	8%	IT	7%
UK	5%	CZ	7%	CZ	6%	CZ	6%

Top 5 host countries for placement mobility

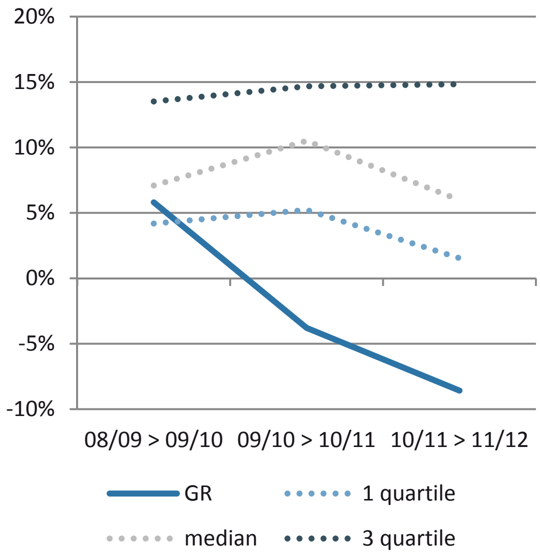
2008/09		2009/10		2010/11		2011/12	
ES	14%	ES	18%	ES	15%	DE	16%
CY	13%	DE	15%	DE	15%	ES	13%
DE	12%	UK	12%	UK	13%	UK	12%
UK	12%	CY	11%	CY	10%	CY	10%
FR	10%	IT	8%	NL	9%	IT	7%

2. Incoming student mobility

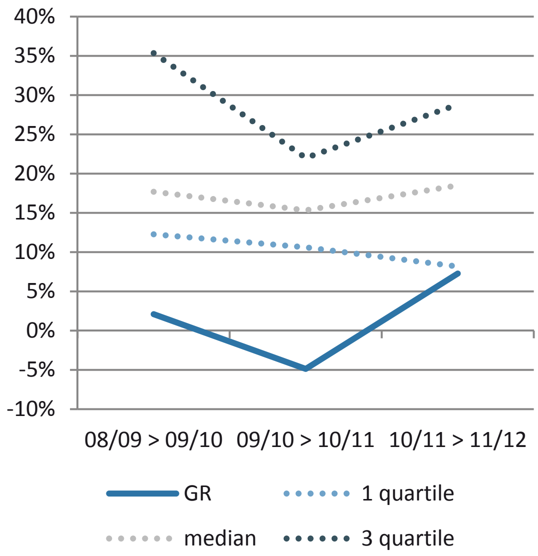
Number of incoming students by type of mobility, share of students coming for placements



Average growth per study year for incoming study mobility



Average growth per study year for incoming placement mobility



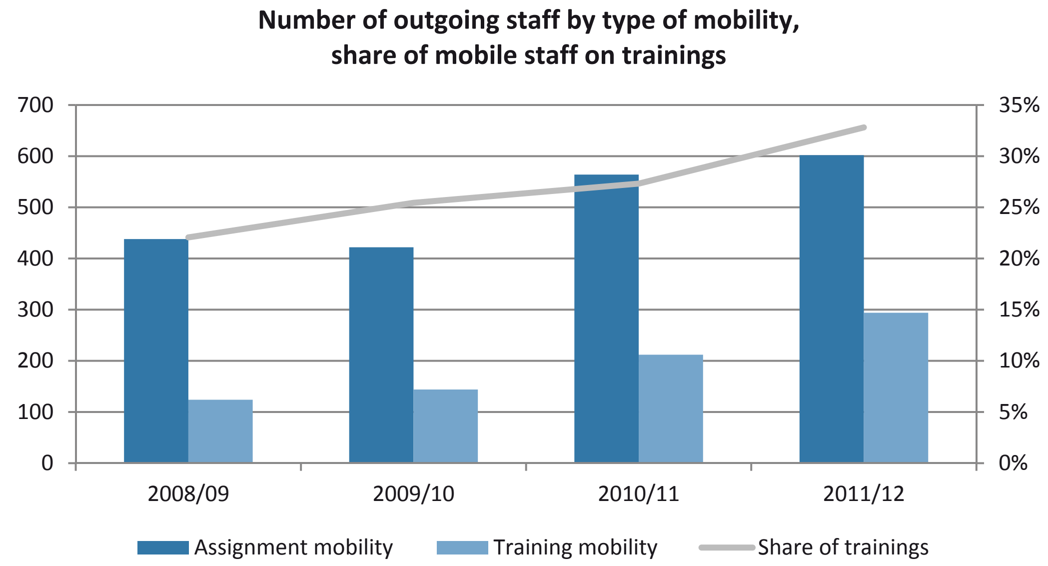
Top 5 sending countries for study mobility

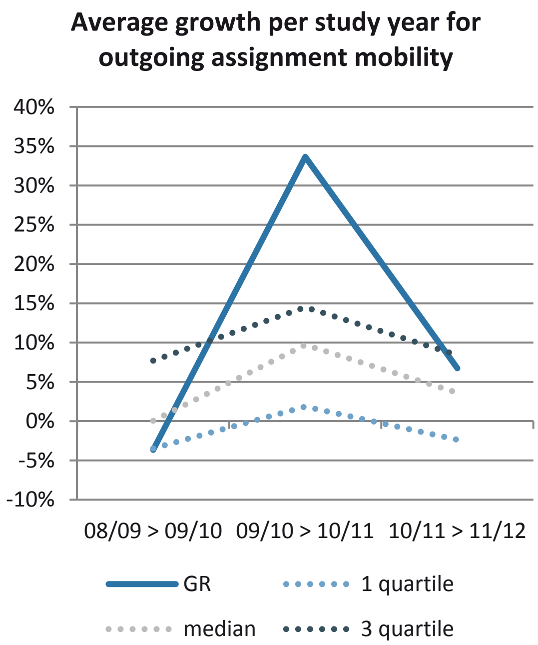
2008/09		2009/10		2010/11		2011/12	
ES	15%	**ES**	16%	**ES**	17%	**ES**	17%
FR	14%	**FR**	14%	**FR**	14%	**FR**	14%
DE	10%	**PL**	9%	**PL**	9%	**PL**	10%
PL	10%	**DE**	8%	**DE**	8%	**DE**	9%
CZ	7%	**IT**	8%	**IT**	7%	**CZ**	8%

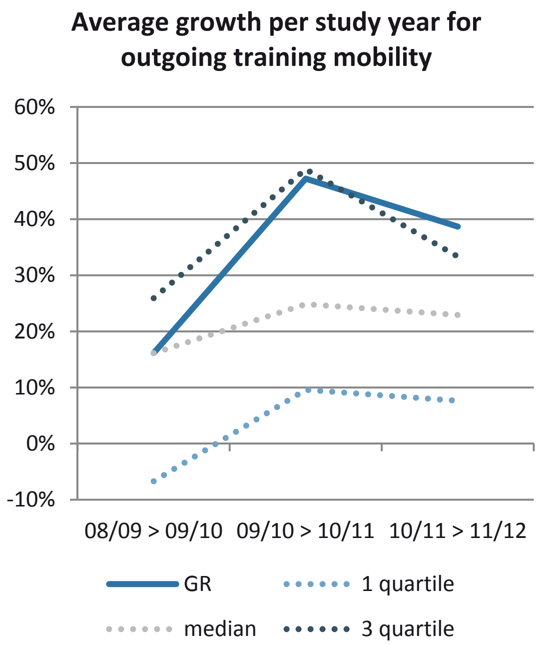
Top 5 sending countries for placement mobility

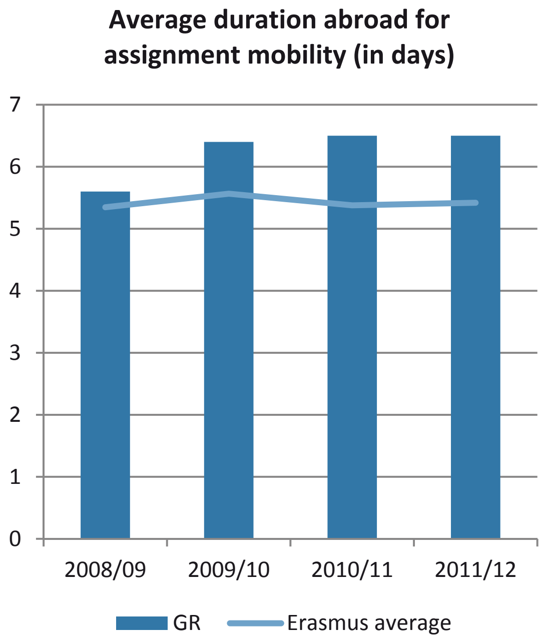
2008/09		2009/10		2010/11		2011/12	
PL	26%	**PL**	32%	**PL**	21%	**LV**	22%
LV	13%	**LV**	14%	**LV**	14%	**PL**	21%
RO	11%	**RO**	13%	**RO**	13%	**FR**	8%
FI	6%	**FR**	7%	**LT**	7%	**LT**	7%
LT	6%	**FI**	4%	**HU**	6%	**RO**	7%

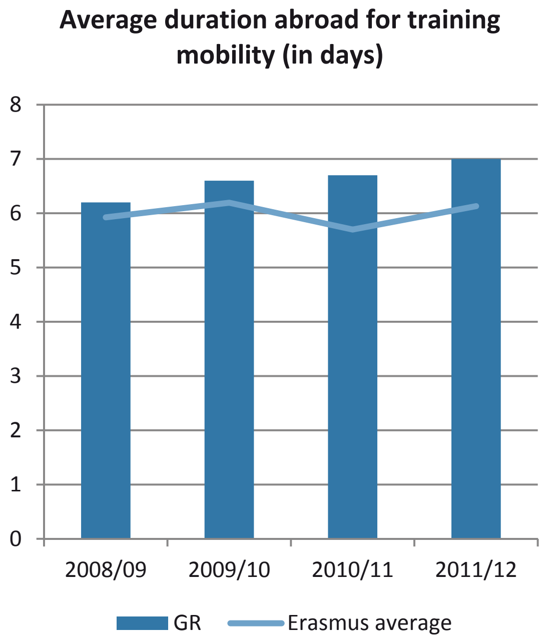
3. Outgoing staff mobility











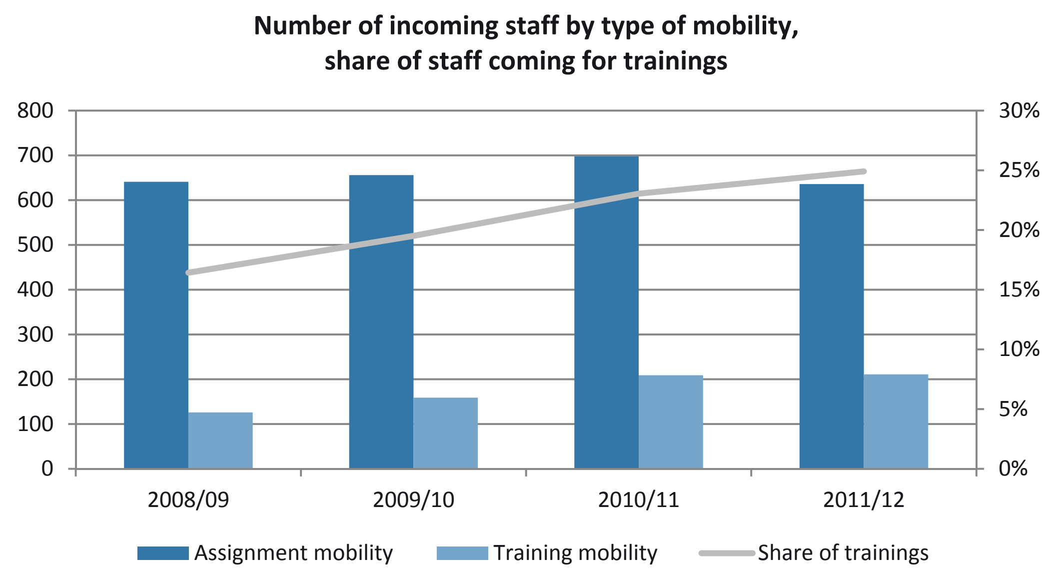
Top 5 host countries for assignment mobility

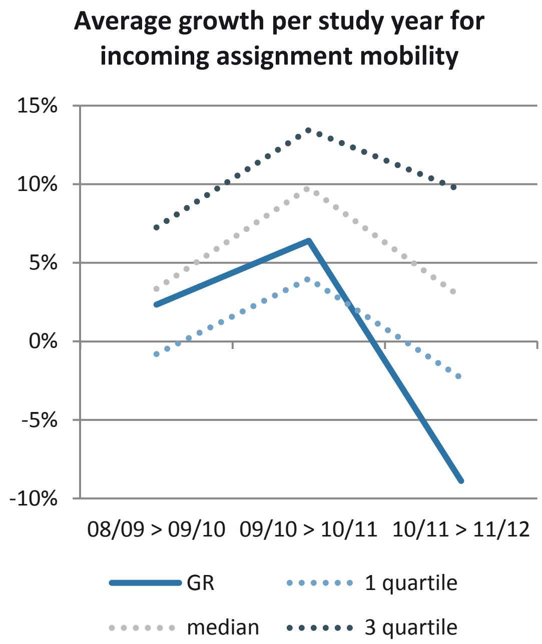
2008/09		2009/10		2010/11		2011/12	
FR	14%	**DE**	14%	**DE**	13%	**FR**	13%
DE	12%	**FR**	11%	**FR**	12%	**DE**	11%
UK	9%	**IT**	10%	**ES**	9%	**IT**	10%
IT	9%	**ES**	8%	**IT**	8%	**ES**	8%
ES	8%	**TR**	7%	**UK**	8%	**CY**	7%

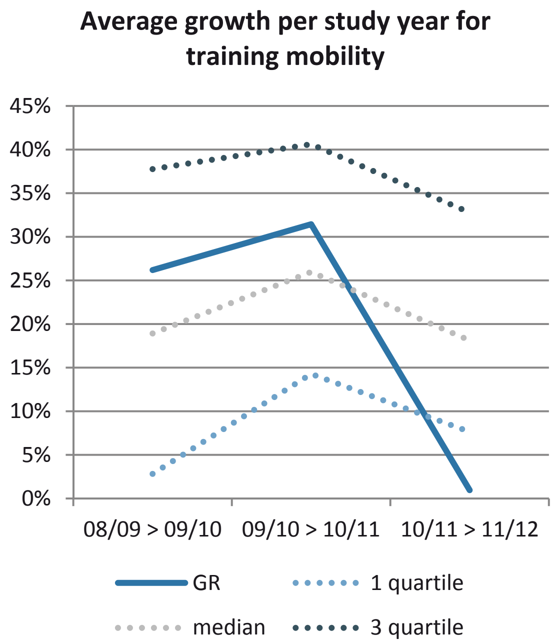
Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	19%	**ES**	13%	**ES**	19%	**ES**	17%
FR	14%	**IT**	10%	**CY**	8%	**DE**	9%
IT	10%	**AT**	10%	**TR**	7%	**IT**	9%
UK	8%	**UK**	10%	**IT**	7%	**CY**	7%
DE	7%	**FR**	8%	**FR**	6%	**PT**	7%

4. Incoming staff mobility







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
FR	13%	**FR**	13%	**FR**	12%	**FR**	11%
DE	10%	**ES**	10%	**RO**	10%	**DE**	10%
UK	9%	**RO**	9%	**DE**	10%	**PL**	10%
ES	9%	**DE**	8%	**PL**	8%	**RO**	9%
RO	8%	**PL**	8%	**UK**	8%	**UK**	8%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
CY	17%	**RO**	14%	**PL**	14%	**PL**	23%
PL	14%	**PL**	12%	**UK**	8%	**RO**	13%
CZ	10%	**ES**	11%	**LV**	8%	**LV**	9%
LV	10%	**FI**	10%	**RO**	8%	**TR**	6%
RO	10%	**CZ**	7%	**CY**	7%	**BG**	6%

ICELAND

1. Summary of analysis

STUDENT MOBILITY

Main trends

Based on the statistics Iceland has been one of the more mobile countries at the European level. Up to 2010/11 the share of students and staff going abroad with the Erasmus programme out of the total student and staff population in Iceland was higher compared to the average share in all Erasmus countries. In 2008/09 the share of mobile students was 1.2% in Iceland while in all Erasmus countries the average share was 1.1%. During the years of economic crisis the share of mobile students increased up to 1.4% in Iceland and 1.5% in all Erasmus countries on average by 2011/12. However, the data for 2011/12 shows some downturn in these trends as these figures for Iceland are lower than the Erasmus average for the first time.

The number of outgoing students has been increasing in Iceland during the crisis although there was a decrease in the absolute numbers of students going abroad for studies in 2011/12 compared to the previous study year. In comparison to other Erasmus countries the average growth rates per study year in Iceland have had much more extreme values but this has also been due to the relatively small absolute numbers of students going abroad, making it more difficult to compare to other countries. The average duration of studies abroad increased until 2010/11 and then decreased again although these have not been major changes and the average duration abroad for Icelandic students has been always slightly higher than the Erasmus average. The average duration for placement mobility has also mostly been higher compared to the average in all Erasmus countries, although in 2011/12 it dropped below the Erasmus average for the first time since 2008/09. There have been some changes to the top five destinations for outgoing student mobility, for example the share of students going to Denmark or Spain has been decreasing and the share going to Sweden or Germany increasing.

The number of incoming students (especially for placements) in Iceland has also been increasing during the economic crisis and in 2009/10 compared to the previous study year, Iceland had one of the highest average growth for incoming student mobility. Since then the average growth per study year for incoming study mobility has been slowing down to only 1%, giving Iceland one of the slowest growths in mobility numbers in 2011/12. Incoming placement mobility also slowed down to only 1% in 2010/11 compared to the previous study year, but then increased again significantly the next study year, giving Iceland one of the highest average growth rates. The top five sending countries for incoming student mobility in Iceland have mainly remained the same during the crisis, although the share of students coming from France or Denmark has been decreasing and increasing from Finland.

Context

According to the National Agency for the Lifelong Programme in Iceland, the financial crisis which hit Iceland in a drastic manner in the autumn of 2008 did not have any significant negative effect on outgoing mobility, except in the spring semester of 2009 when outgoing mobility fell considerably and students already on an exchange abroad had both difficulties receiving funding (mainly in the form of national student loans) from Iceland and coping with higher living costs abroad due to the drastic devaluation of the Icelandic krona. The drop in total numbers for the academic year 2008/09 compared to the previous study year was only around 9% and the following years have been record years in outgoing mobility, both for students and staff.

The national agency and international coordinators at HEIs have speculated that the increase in mobility could indeed be contributed to the financial crisis. Following the crisis, students became more reluctant to go abroad for full degree studies due to the very unstable Icelandic currency which devalued more than 50% in the wake of the crisis. As a result, a shorter period abroad became more appealing. According to the data from the Icelandic Student Loan Fund the number of Icelandic students enrolled in full degree studies abroad decreased considerably during this period by 7.3% between 2008/09 and 2009/10 and were down 9.7% in 2011/12 (from 2008/09 numbers). A counter argument is that this trend is fully in line with previous years. There has been a steady growth in outgoing mobility since Iceland started its participation in 1992, with some periods of stagnation. Furthermore, given the sharp increase in enrolment numbers of students in higher education in Iceland after the financial crisis, an increase in outgoing mobility was to be expected.

Increases in higher education enrolment since 2008 (12% from 2008 to 2011) indicate that fewer opportunities in the labour market as a result of the crisis have pushed more people into higher education studies. This has, however, meant that the composition of the student body has changed – an increasing share of older students, part-time students and students with children, etc. who are not as flexible to go abroad due to their family commitments. Iceland has also a limited tradition of traineeships abroad since most students work during the summer to finance their studies. Many study programmes are furthermore not flexible enough to integrate traineeships making it more difficult for students to get their work abroad recognised towards their degree or in the transcript of records. Despite increases in enrolment, the financial crisis has also led to decreased funding for HEIs which in turn has led to a decreased number of courses and programmes taught which could have led to an increasing need for a study period abroad. That said, the national agency has no tangible data to support this theory.

There are no national grant schemes in place for studies abroad. Students can get student loans and in the wake of the crisis the Icelandic Student Loan Fund partly adapted the loan amount students receive while studying abroad to counter the drastic fall of the Icelandic krona. As for Erasmus grants, there has been no significant change in grant levels since 2008. Due to easy access to student loans, family support does not play a major role in access to higher education nor student mobility. No tuition fees are charged in public institutions, only registration fees which have increased since 2008 from around €280 to €380 for a full academic year. This change was to be expected and cannot be linked to the financial crisis; it can mostly be attributed to general cost inflation. There have been moderate changes in tuition fees at private institutions: around a 30% increase from 2008 to 2012 which can also be attributed to the change in the inflation index. In some cases, however, tuition fees have remained the same since 2009/10 to encourage students to enrol. This is, for example, the case for Master's programmes at the University of Reykjavik.

The drastic devaluation of the Icelandic currency after the financial crisis lowered the living cost for foreign students studying in Iceland considerably. Since 2008 there has been a sharp increase in the number of incoming Erasmus students, likely affected by the low living costs, although that is only speculative.

STAFF MOBILITY

Main trends

There has been a slight decrease in the numbers of outgoing staff mobility in Iceland since 2008/09 due to a constant decrease in outgoing assignment mobility. At the same time, the number of staff going abroad for trainings has been increasing although there was a small decline in 2010/11 compared to the previous study year. As the absolute numbers for outgoing staff mobility in Iceland are very small (less than 100 people in total), the changes in the average growth per study year appear more extreme. The share of mobile staff in the total staff population in Iceland has been relatively high compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 6.7% in Iceland while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff in Iceland initially decreased to 6% in 2010/11 and then started to increase again the next year up to 6.6%. In all Erasmus countries on average the share was 5.5% and 7.3% respectively. The average duration of the mobility period abroad for assignments increased until 2010/11 and then decreased back to the level of 2008/09, the average duration for training abroad has always been decreasing during the crisis. Nevertheless, on average staff from Iceland stay abroad for a much longer period of time for both types of mobility in comparison to their colleagues in all Erasmus countries. As the absolute numbers for outgoing staff mobility are very small in Iceland, the top destinations also have a greater variety over time. In 2011/12, when the number of outgoing training mobility increased significantly, about a third of those staff member went to the UK, which had not been in the top destinations before for training mobility. At the same time, the share of staff going for training in Denmark has been decreasing significantly.

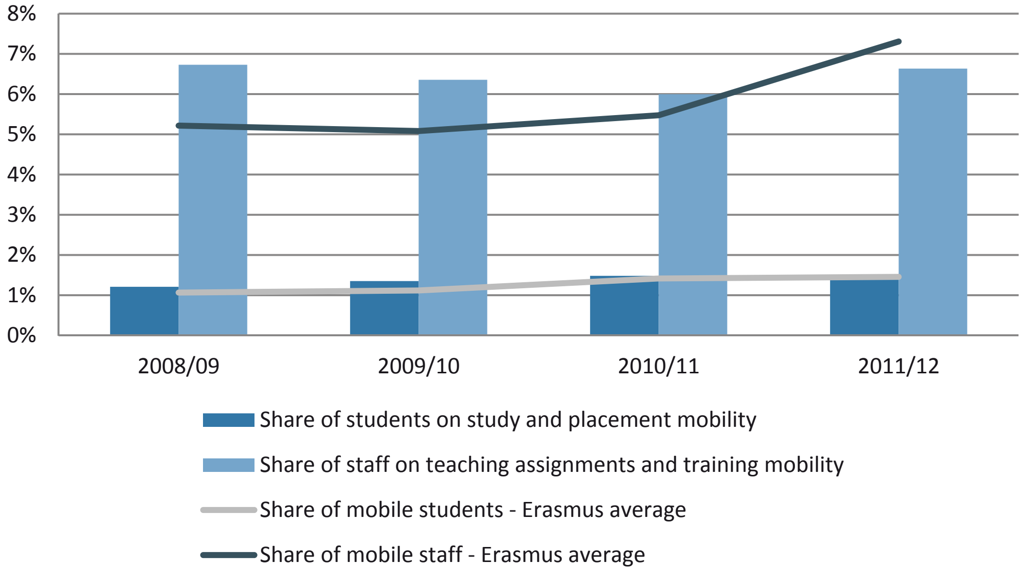
The number of incoming staff more than doubled from 2008/09 to 2009/10 in Iceland due to a large increase in incoming training mobility that study year. Since then the number of incoming assignment mobility has been increasing steadily and in international comparison Iceland has had one of the highest average growth rates. On the other hand, the number of staff coming to Iceland for training has been decreasing significantly. The top sending countries for incoming staff mobility have been changing during the crisis with most of the staff still coming from Poland (the significant increase in training mobility in 2009/10 can be attributed to 70% of staff coming from Poland).

Context

There have been moderate changes in the working conditions of academic staff in Iceland since 2008. In the wake of the crisis restrictions were put on the travel of staff at the largest public university in Iceland, the University of Iceland, which led to increased demand for Erasmus staff/teacher mobility grants. Following the crisis, public employers were further subjected to a decrease or capping of their salaries. In 2011, decreases which had been made to salaries were corrected and public employees started to receive negotiated salary increases again.

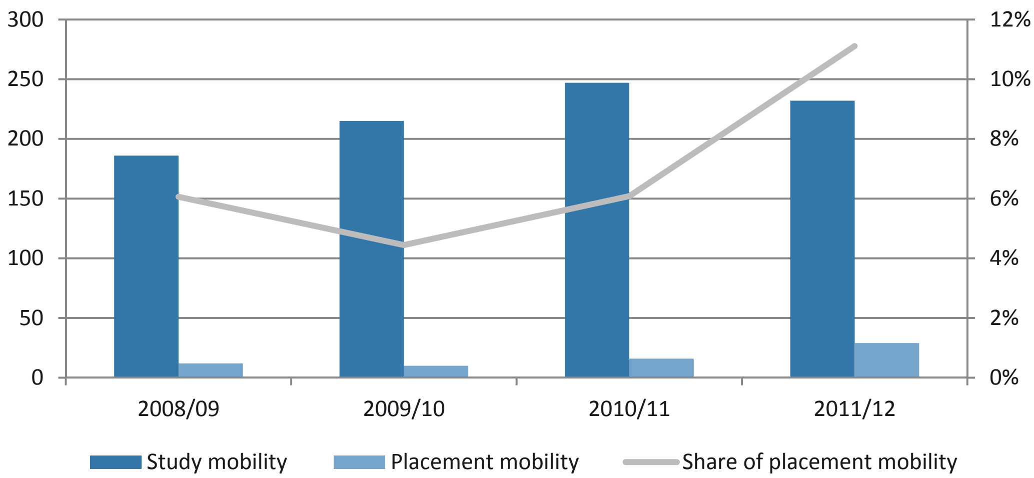
2. Data appendix

Share of mobile students and staff in Iceland[10]

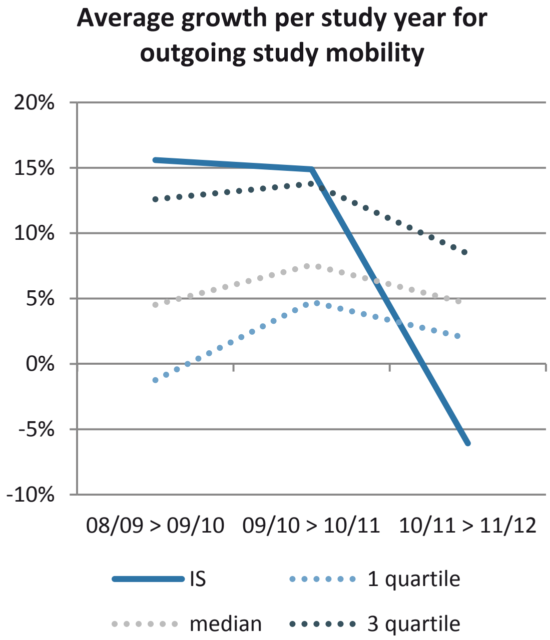


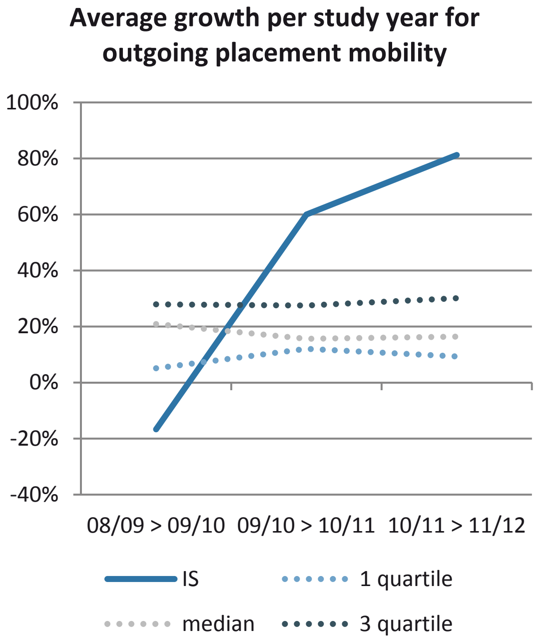
1. Outgoing student mobility

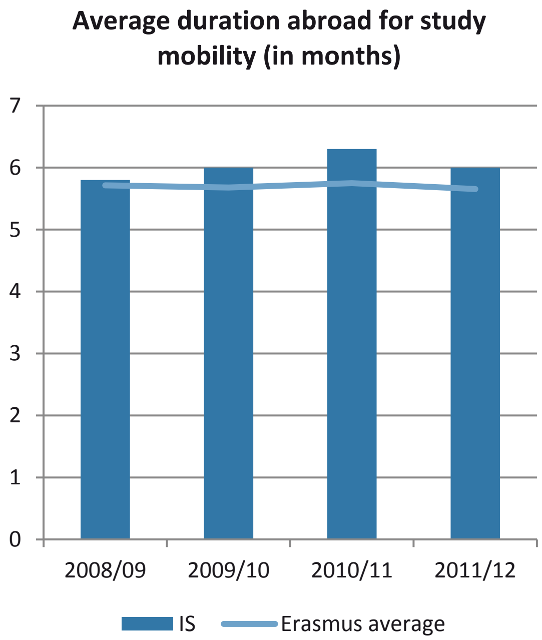
Number of outgoing students by type of mobility, share of mobile students going abroad for placements

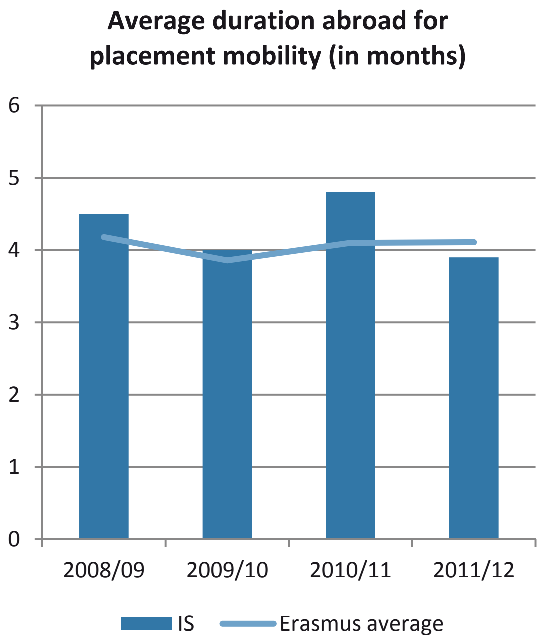


[10] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.


Average growth per study year for outgoing study mobility
20%
15%
10%
5%
0%
-5%
-10%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
IS
1 quartile
median
3 quartile


Average growth per study year for outgoing placement mobility
100%
80%
60%
40%
20%
0%
-20%
-40%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
IS
1 quartile
median
3 quartile


Average duration abroad for study mobility (in months)
7
6
5
4
3
2
1
0
2008/09
2009/10
2010/11
2011/12
IS
Erasmus average


Average duration abroad for placement mobility (in months)
6
5
4
3
2
1
0
2008/09
2009/10
2010/11
2011/12
IS
Erasmus average

Top 5 host countries for study mobility

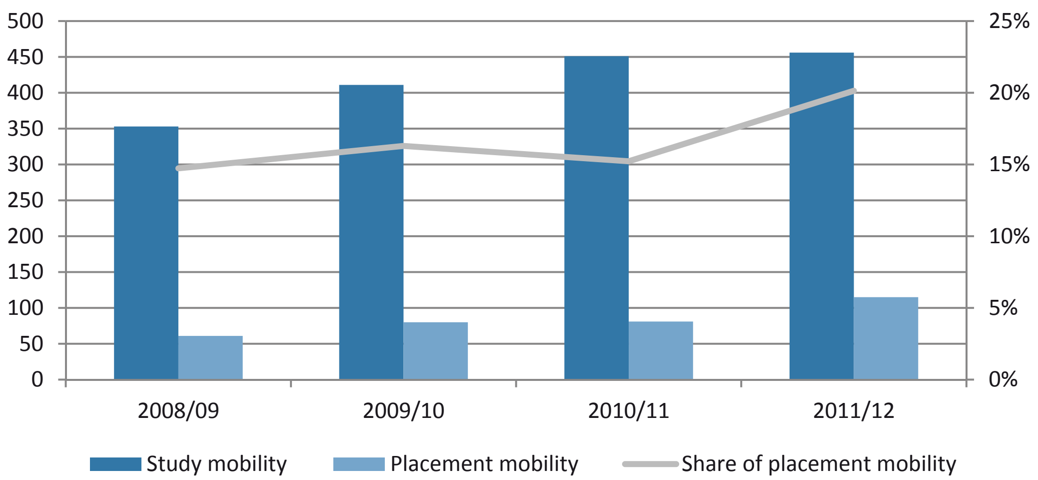
2008/09		2009/10		2010/11		2011/12	
DK	31%	DK	23%	DK	19%	SE	17%
DE	11%	ES	17%	ES	15%	DK	14%
SE	10%	SE	12%	SE	15%	ES	12%
UK	9%	DE	9%	DE	12%	DE	10%
FR	8%	NL	7%	FR	8%	IT	9%

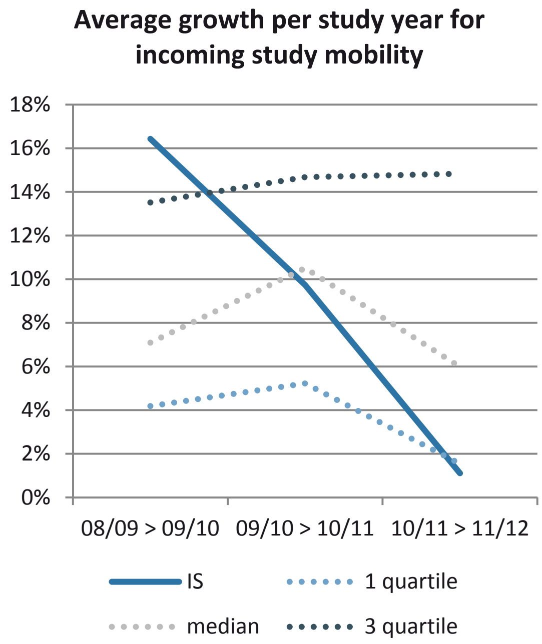
Top 5 host countries for placement mobility

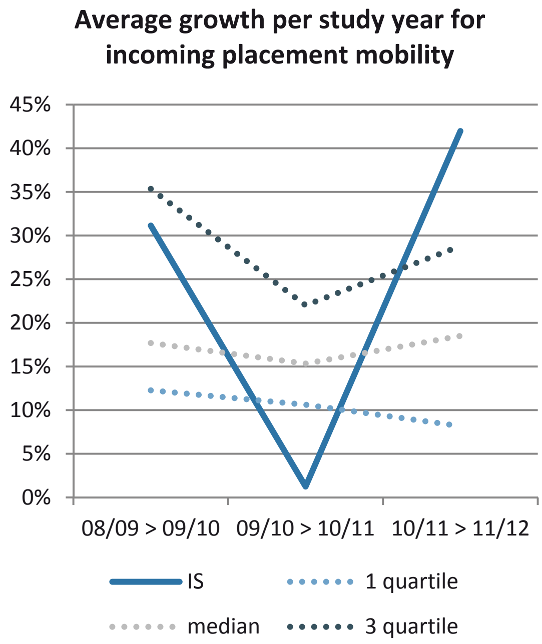
2008/09		2009/10		2010/11		2011/12	
DK	25%	DK	20%	UK	25%	DE	21%
FR	17%	FR	20%	SE	19%	SE	17%
SE	17%	IT	20%	DE	13%	AT	10%
BE	8%	UK	20%	ES	13%	ES	10%
DE	8%	IE	10%	IE	13%	MT	10%

2. Incoming student mobility

Number of incoming students by type of mobility, share of students coming for placements







Top 5 sending countries for study mobility

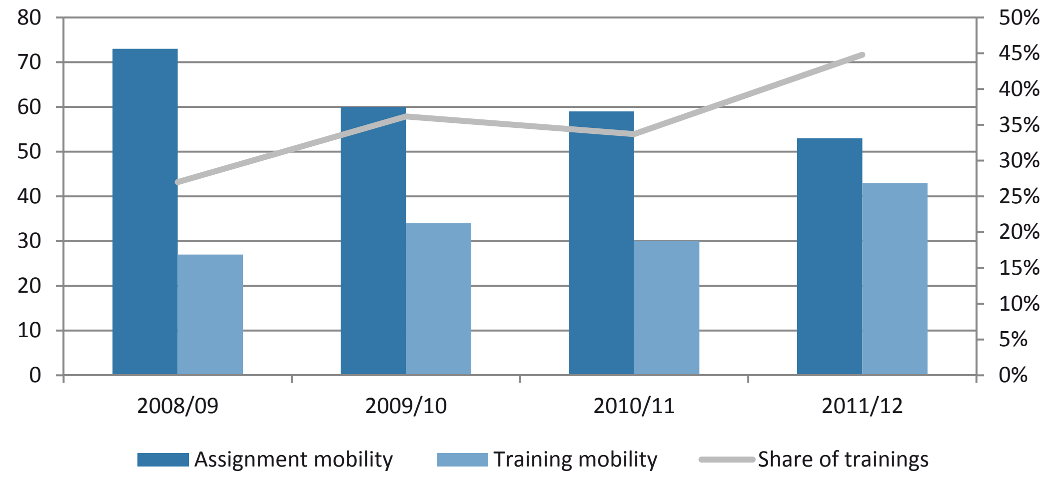
2008/09		2009/10		2010/11		2011/12	
DE	23%	**DE**	22%	**DE**	23%	**DE**	24%
FR	16%	**FR**	12%	**ES**	13%	**ES**	12%
IT	10%	**ES**	12%	**FR**	13%	**FR**	12%
ES	9%	**IT**	8%	**IT**	10%	**IT**	7%
AT	7%	**AT**	8%	**AT**	7%	**UK**	6%

Top 5 sending countries for placement mobility

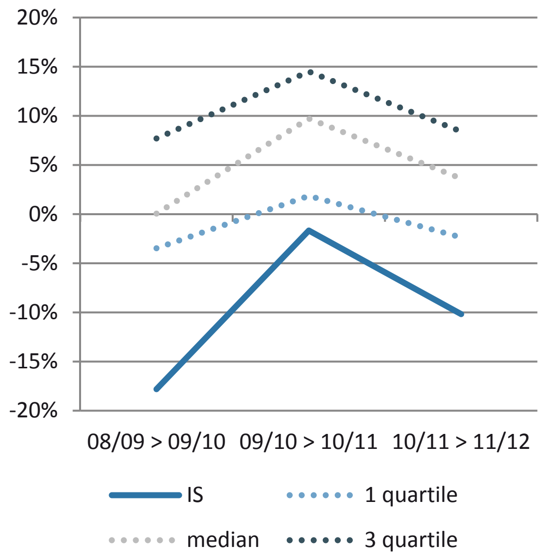
2008/09		2009/10		2010/11		2011/12	
DE	21%	**DK**	20%	**DK**	19%	**DE**	18%
DK	21%	**DE**	13%	**DE**	17%	**FI**	14%
FI	8%	**LV**	13%	**ES**	10%	**DK**	10%
LT	8%	**LT**	11%	**FI**	10%	**FR**	9%
LV	8%	**FI**	10%	**LV**	7%	**ES**	7%

3. Outgoing staff mobility

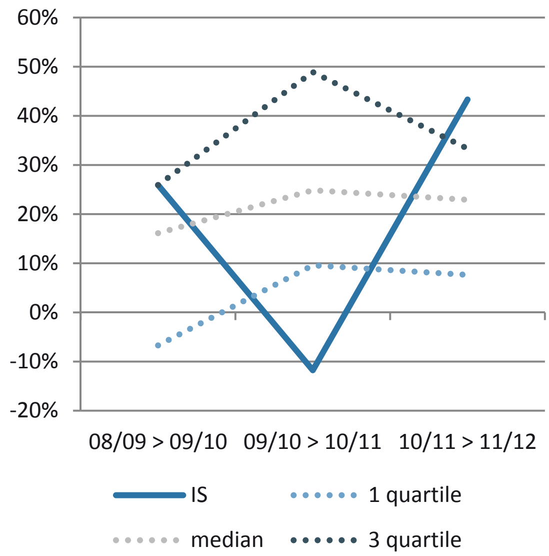
Number of outgoing staff by type of mobility, share of mobile staff going abroad for trainings

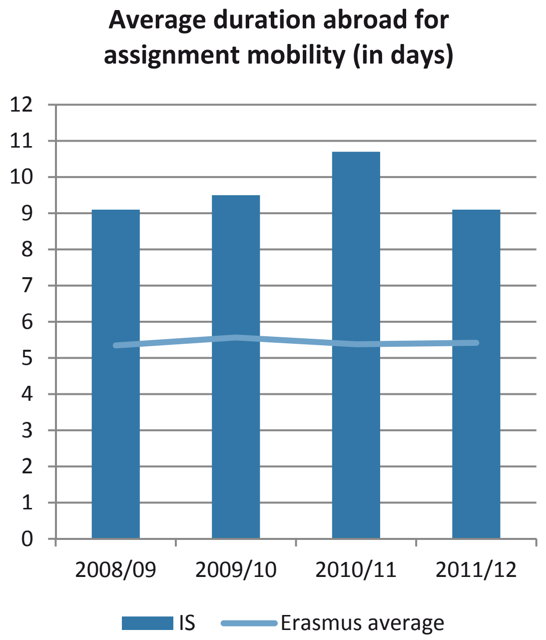


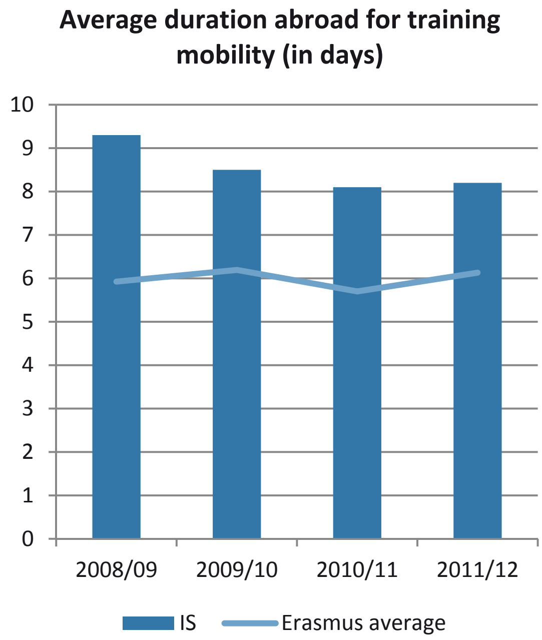
Average growth per study year for outgoing assignment mobility



Average growth per study year for outgoing training mobility







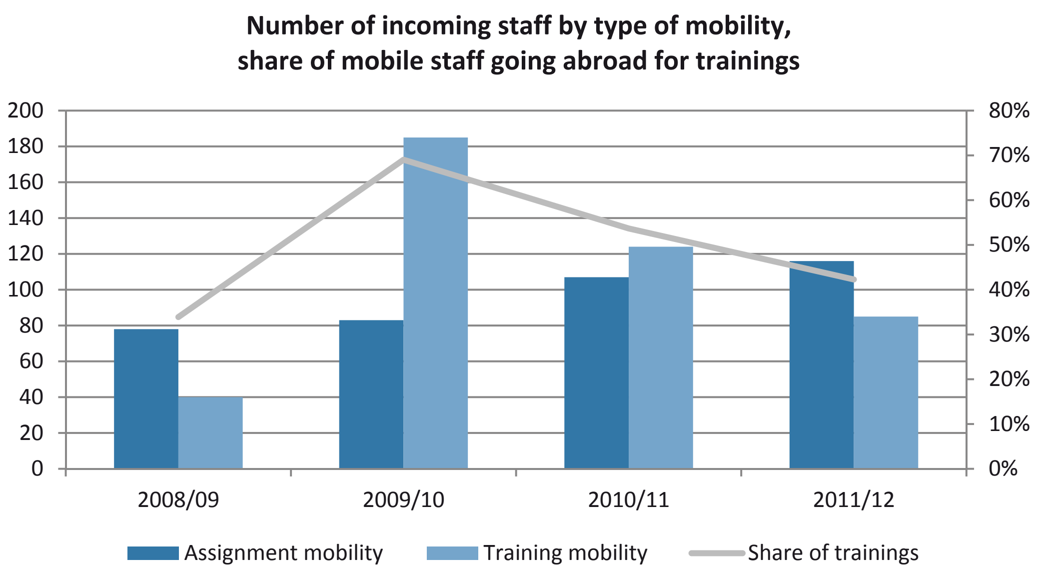
Top 5 host countries for assignment mobility

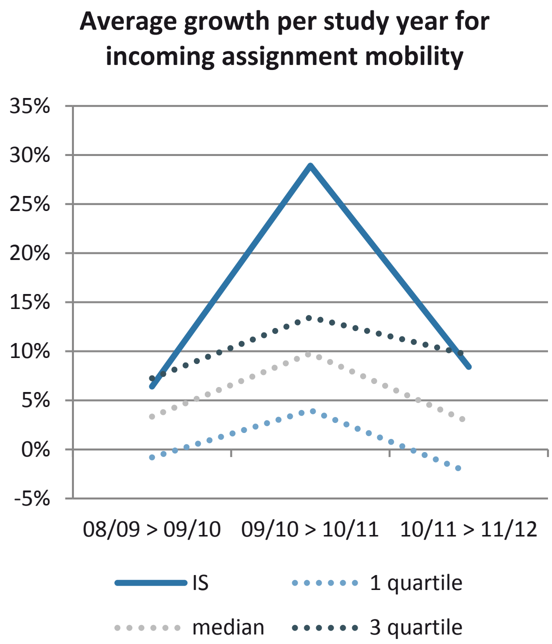
2008/09		2009/10		2010/11		2011/12	
FR	11%	**FR**	15%	**SE**	17%	**PL**	13%
IT	11%	**SE**	13%	**DE**	12%	**DE**	11%
FI	10%	**DK**	10%	**ES**	10%	**FI**	11%
SE	10%	**DE**	8%	**FR**	10%	**DK**	9%
AT	8%	**UK**	8%	**NL**	8%	**FR**	9%

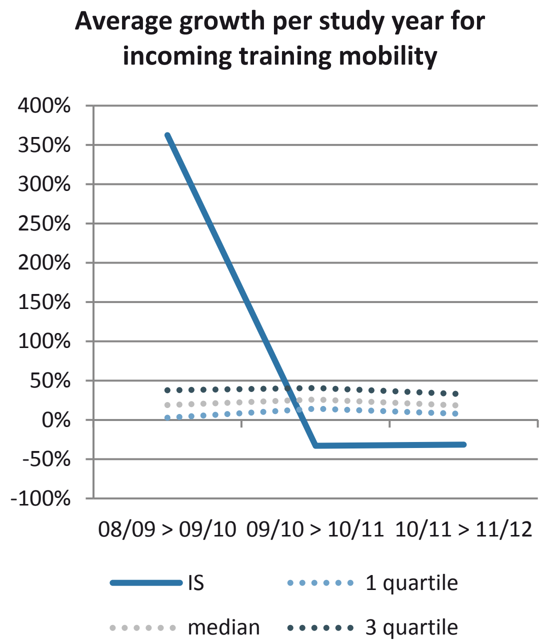
Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
DK	30%	**DK**	35%	**IE**	17%	**UK**	33%
FI	15%	**ES**	12%	**DK**	13%	**DK**	12%
FR	15%	**AT**	9%	**BE**	10%	**DE**	9%
NL	7%	**FI**	9%	**DE**	10%	**SE**	9%
SE	7%	**FR**	9%	**NL**	10%	**ES**	7%

4. Incoming staff mobility







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
FR	10%	**DE**	13%	**PL**	21%	**DE**	12%
SE	10%	**ES**	13%	**DE**	12%	**DK**	10%
DE	9%	**FI**	12%	**ES**	12%	**FI**	10%
DK	9%	**PL**	12%	**FI**	7%	**PL**	9%
IT	9%	**FR**	6%	**IT**	7%	**SE**	8%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
PL	25%	**PL**	70%	**PL**	55%	**PL**	38%
SE	25%	**DE**	4%	**CZ**	8%	**HU**	7%
FI	20%	**RO**	4%	**DE**	6%	**CZ**	6%
DE	13%	**ES**	3%	**RO**	6%	**FI**	6%
CZ	8%	**SE**	3%	**EE**	4%	**AT**	5%

IRELAND

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of outgoing students has been increasing in Ireland during the economic crisis and in comparison to all the Erasmus countries Ireland has had one of the highest average growth rates per study year for both types of student mobility. At the same time, the average growth per study year has seen a larger decline in 2011/12 compared to the previous study year than other countries with high growth. The share of mobile students in the total student population in Ireland has been similar to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 1.1% in Ireland as well as in all Erasmus countries on average. During the years of economic crisis the share of mobile students increased to 1.5% both in Ireland and in all Erasmus countries on average by 2011/12. The average duration of studies and placements abroad has not changed much for Ireland since 2008/09. Compared to the average duration in all Erasmus countries, students from Ireland spend more time abroad for studies and placements. The top five host countries for studies and placements for outgoing students from Ireland have mainly remained the same during the crisis, although the share of students going to France for placements has been decreasing. The number of incoming students decreased slightly in 2009/10 compared to the previous study year (due to a decrease in incoming study mobility) and has since then been increasing again. The average growth per study year has been relatively low, making Ireland one of the Erasmus countries with the lowest average growth rates for incoming study mobility and more similar to the median countries for placement mobility. The top five sending countries for incoming studies and internships in Ireland have remained mainly the same since the study year 2008/09 although the share of students coming to Ireland for placements from the UK has been decreasing.

Context

The economic crisis has had its effect on Erasmus mobility, but maybe rather more positively than negatively. The wider economic downturn since 2008 has obviously hit all individuals with increased unemployment; higher costs for some services and cuts to salary levels for those working in the public sector. In many families there is a high level of indebtedness and while this has not curbed the demand for higher education it may have an impact on mobility. At the same time, outgoing mobility numbers have almost doubled in the period since 2008. According to the national agency this might be due to improved promotion by the agency itself; an increased pool of available students, the addition of the placement option and an increasing feeling among students and parents that a mobility period will enhance their employability. The crisis has made people to think more about what to do to enhance their qualification and to have better chances in the job market, so this has had a positive effect on mobility. Also, due to less part-time jobs available stemming from the crisis, more students have become mobile as having a job used to be one of the main obstacles for mobility before. Demand for higher education has not reduced; in fact it has probably grown since school leavers have very few options of getting immediate direct employment. In the past many young men went into jobs in the construction industry direct from secondary education. This option is no longer present.

There have been no changes in grants – student maintenance grants for undergraduate students continue to be portable. Maintenance grants for postgraduate studies were never portable and there has been no change in that rule. The Erasmus grant (about €200 per month) has remained the same throughout the past years and there is no national co-funding for Erasmus. There is no state-supported student loan system in Ireland. Access to student loans from banks and other financial institutions remains strong; however, the costs of such loans have risen. Some incidences of students not being able to get such loans have been encountered due to the inability of their parents to act as guarantor. There have been moderate changes in study costs as the student registration charge has gradually grown over the period to its current level in 2013-14 of €2,500. This charge is planned to rise to €2,750 in 2014-15 and €3,000 in 2015-16.

The cost of living has dropped in Ireland over the past five years, with the exception of Dublin where the demand for rented accommodation remains high. However, the prices of other items such as food, clothes (in some outlets) and entertainment have decreased, making Ireland more attractive for incoming students. The general downturn in the economy has made it more difficult for foreign students to find work in Ireland but sometimes their multilingual background can be an advantage in certain sectors.

STAFF MOBILITY

Main trends

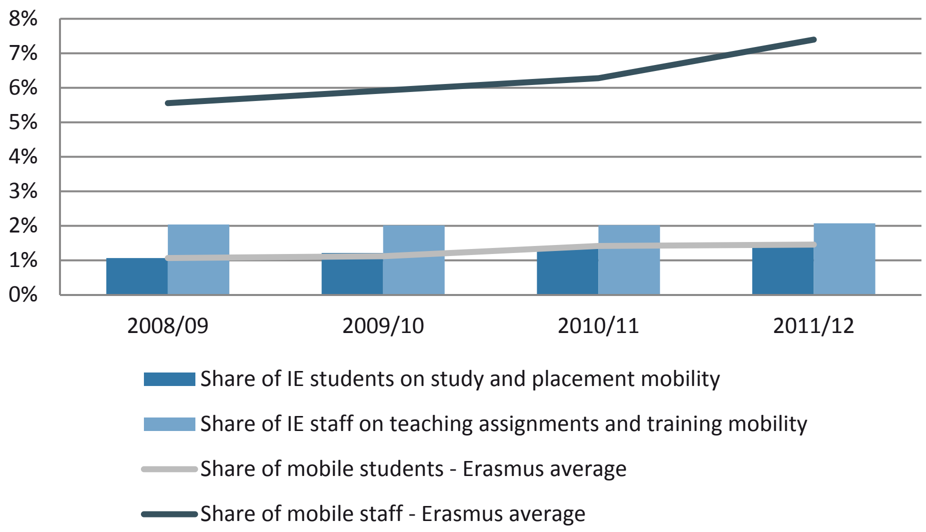
The number of staff going abroad has been increasing mainly due to an increase in outgoing training mobility. The study year 2011/12 stands out with a largest growth in mobility numbers in Ireland compared to the previous study years, although the absolute numbers have been relatively small. This is the opposite of the general trend in Erasmus countries, where the average growth per study year started to slow down in 2011/12. The share of mobile staff in the total staff population in Ireland has been very low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 2% in Ireland while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff increased only to 2.1% in Ireland but to 7.3% in all Erasmus countries on average by 2011/12. The average duration of staff mobility abroad has decreased for training mobility and varied for assignment mobility. In international comparison, outgoing staff from Ireland spend less time abroad for assignments and training than their colleagues in all Erasmus countries on average. The top five host countries for outgoing staff from Ireland have mainly remained the same since 2008/09 although the share of staff going to France has decreased for both types of mobility and the UK has become more popular as a destination for staff going abroad for trainings. The number of staff coming to Ireland for Erasmus mobility has been increasing during the economic crisis although there was a slight decrease in incoming assignment mobility in 2009/10 compared to the previous study year. On the other hand, the number of staff coming to Ireland for training almost doubled in 2011/12 compared to the previous study year making Ireland one of those rare countries where the share of staff coming in for training is higher than for assignments. The top five sending countries for incoming staff in Ireland have not changed much since 2008/09 although the share of staff coming from Spain and Germany has been decreasing and the share of staff coming from Finland increasing.

Context

There have been moderate changes in the working conditions and salaries of academic staff in Ireland: there is a recruitment embargo in HEIs which means that there are fewer people doing more work. This has made it more difficult for staff to find time to undertake mobility since it can be difficult to provide cover while they are away. This might explain why the average duration abroad for Irish staff is relatively low (and decreasing) compared to the Erasmus average. All public sector employees have also taken wage cuts and suffered increased deductions from their wage levels.

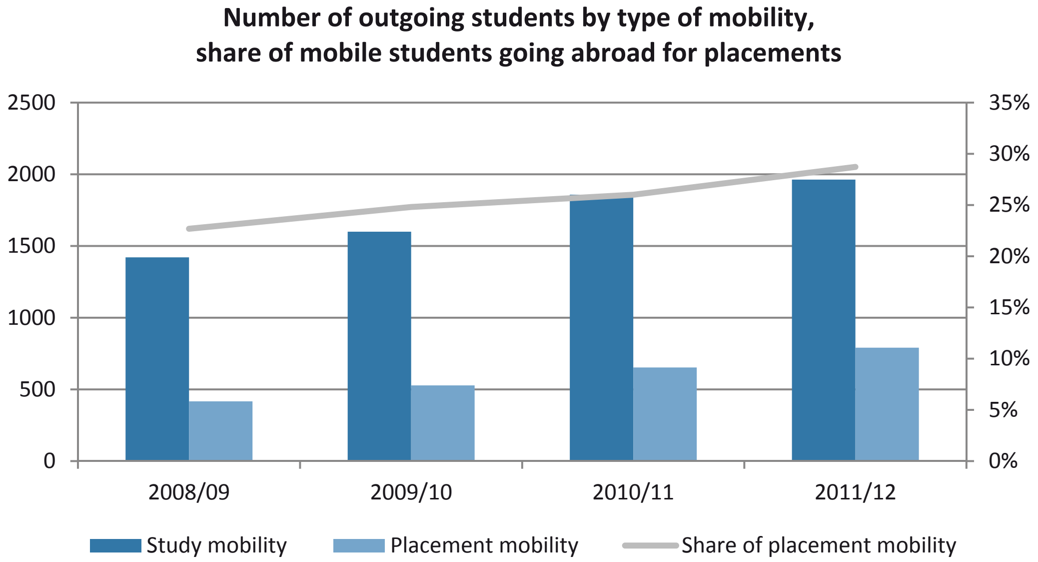
2. Data appendix

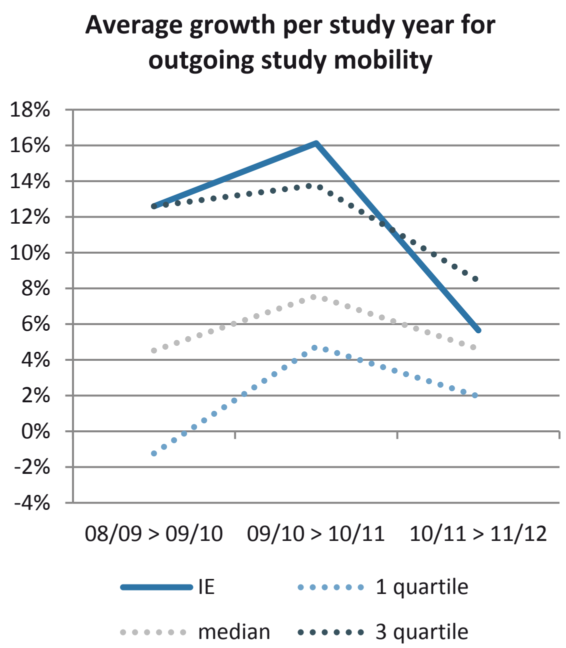
Share of mobile students and staff in Ireland[11]

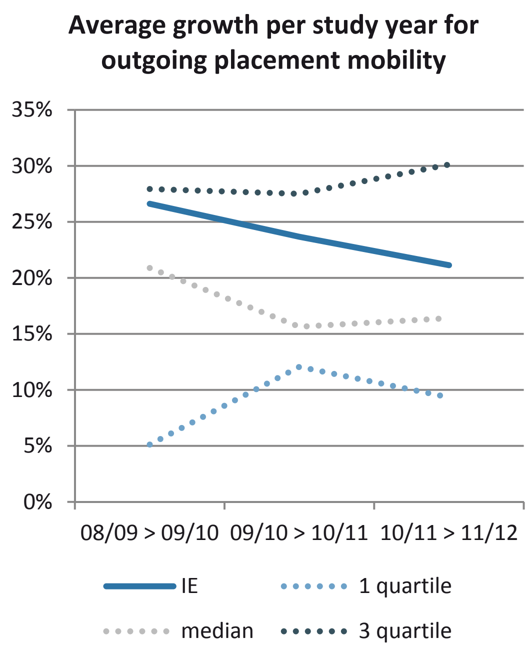


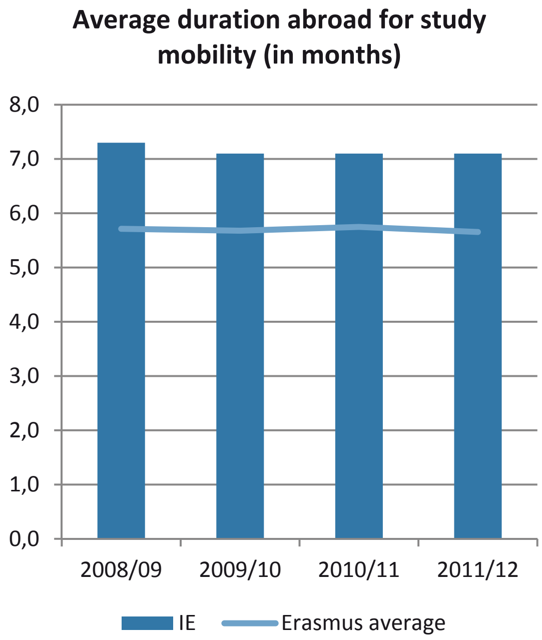
[11] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.

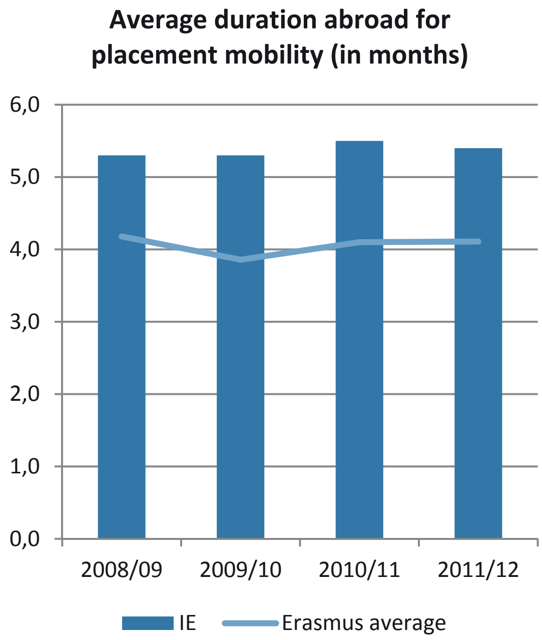
1. Outgoing student mobility











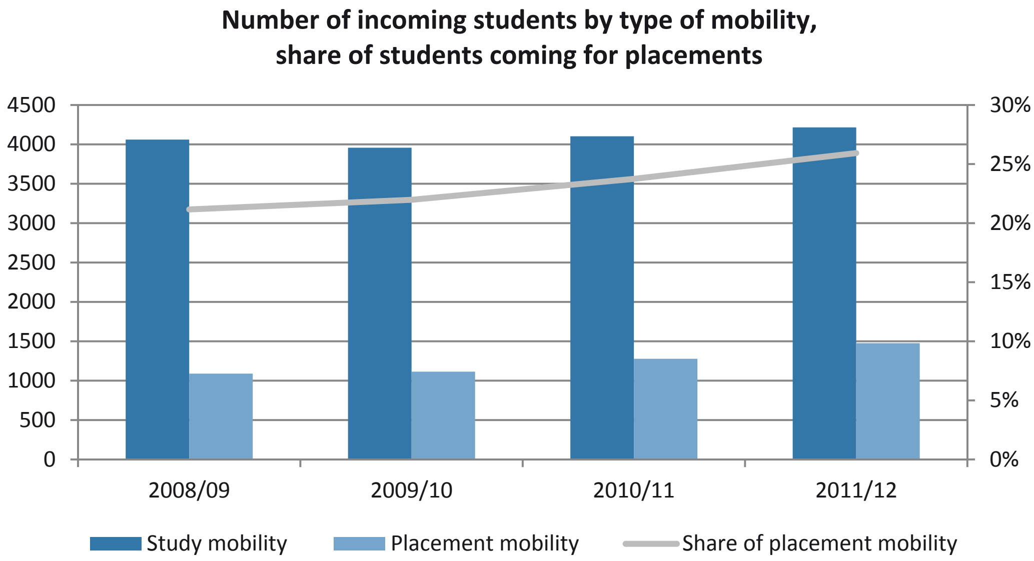
Top 5 host countries for study mobility

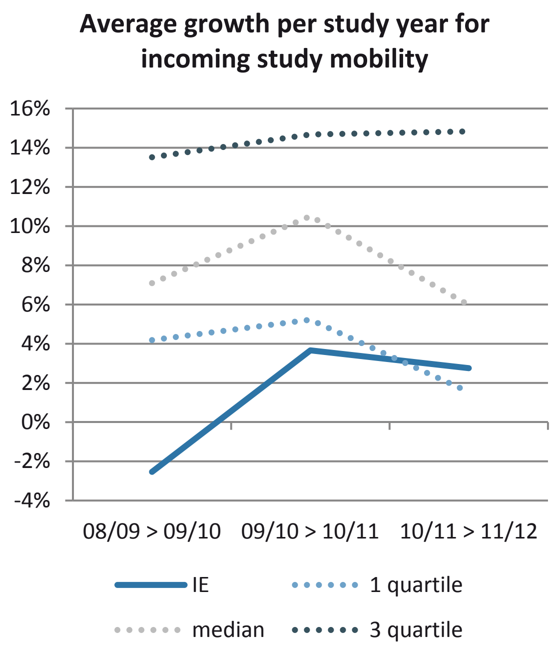
2008/09		2009/10		2010/11		2011/12	
FR	28%	**FR**	27%	**FR**	30%	**FR**	28%
ES	18%	**ES**	19%	**ES**	18%	**ES**	17%
DE	15%	**DE**	13%	**DE**	12%	**DE**	15%
IT	6%	**SE**	6%	**NL**	6%	**NL**	6%
SE	5%	**IT**	6%	**SE**	6%	**UK**	5%

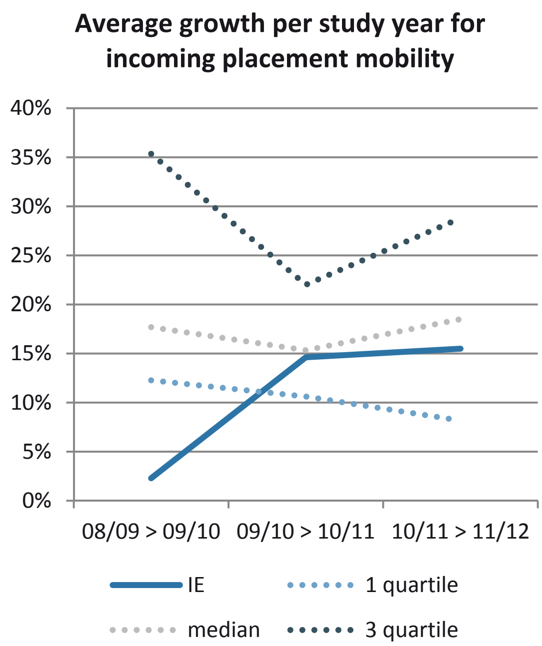
Top 5 host countries for placement mobility

2008/09		2009/10		2010/11		2011/12	
UK	37%	**UK**	32%	**UK**	39%	**UK**	39%
FR	18%	**FR**	17%	**ES**	17%	**ES**	16%
ES	14%	**ES**	16%	**FR**	15%	**FR**	13%
DE	9%	**DE**	10%	**DE**	9%	**DE**	10%
BE	5%	**LU**	6%	**NL**	6%	**BE**	6%

2. Incoming student mobility







Top 5 sending countries for study mobility

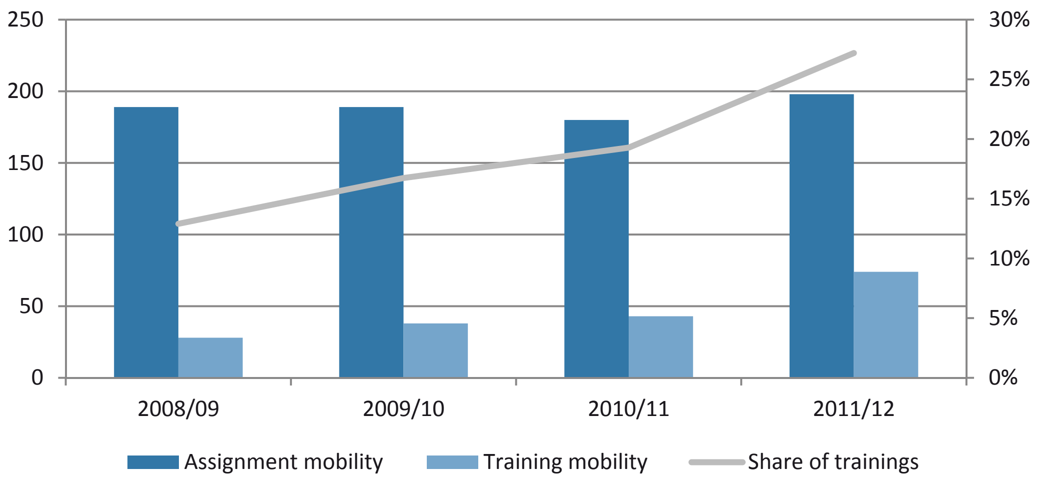
2008/09		2009/10		2010/11		2011/12	
FR	31%	**FR**	31%	**FR**	33%	**FR**	31%
DE	22%	**DE**	21%	**DE**	20%	**DE**	19%
ES	15%	**ES**	16%	**ES**	15%	**ES**	15%
IT	7%	**IT**	7%	**IT**	7%	**IT**	7%
AT	3%	**NL**	4%	**AT**	4%	**NL**	4%

Top 5 sending countries for placement mobility

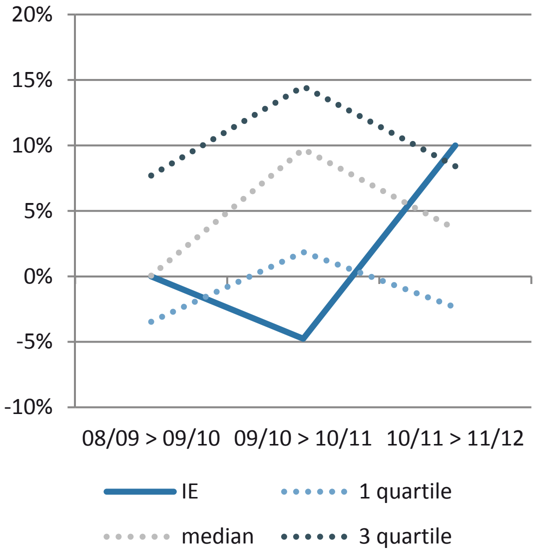
2008/09		2009/10		2010/11		2011/12	
FR	24%	**FR**	28%	**ES**	26%	**FR**	28%
ES	23%	**ES**	21%	**FR**	25%	**ES**	24%
DE	17%	**DE**	17%	**DE**	18%	**DE**	16%
UK	13%	**UK**	9%	**UK**	6%	**UK**	8%
IT	6%	**IT**	6%	**IT**	5%	**IT**	7%

3. Outgoing staff mobility

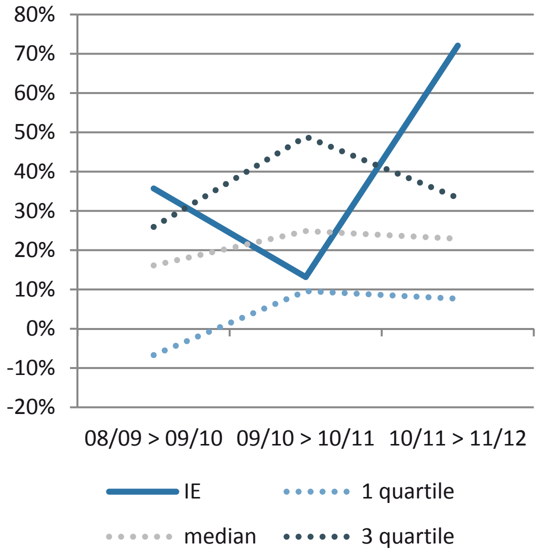
Number of outgoing staff by type of mobility, share of mobile staff going abroad for trainings



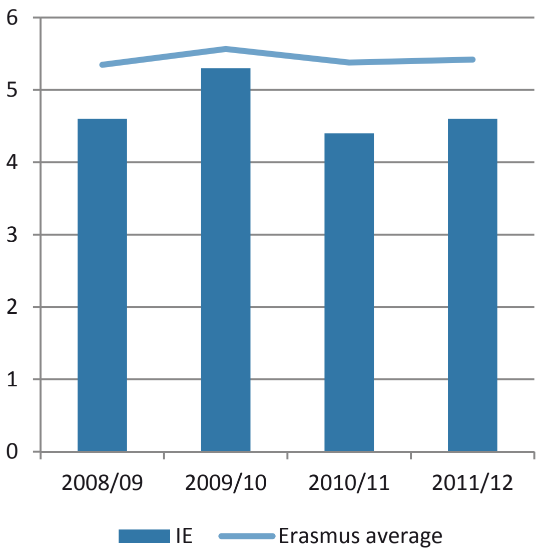
Average growth per study year for outgoing assignment mobility



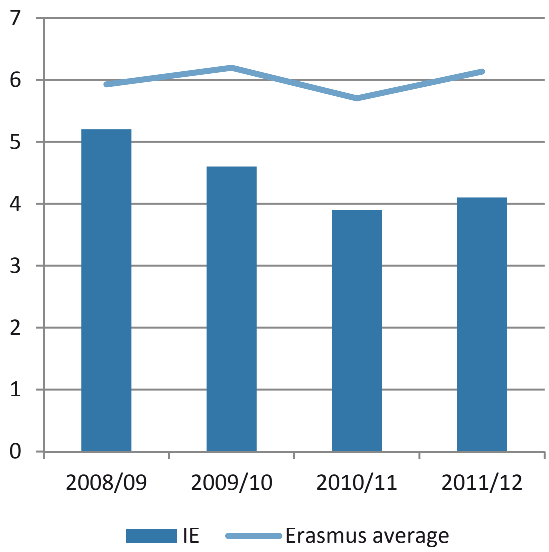
Average growth per study year for outgoing training mobility



Average duration abroad for outgoing assignment mobility



Average duration abroad for outgoing training mobility



Top 5 host countries for assignment mobility

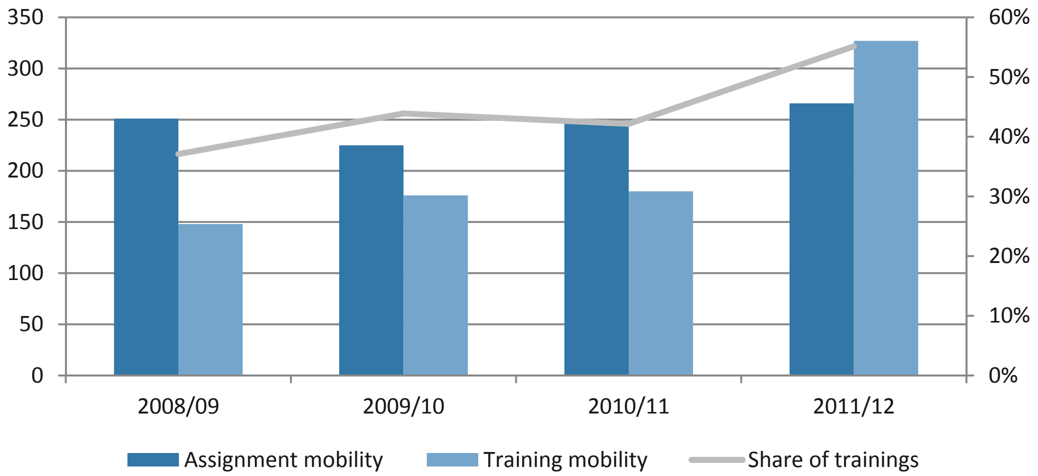
2008/09		2009/10		2010/11		2011/12	
FR	19%	**FR**	16%	**FR**	18%	**DE**	14%
DE	16%	**DE**	15%	**ES**	11%	**FR**	12%
ES	11%	**ES**	10%	**DE**	10%	**ES**	11%
AT	7%	**IT**	8%	**IT**	9%	**NL**	10%
PL	6%	**NL**	5%	**UK**	8%	**IT**	7%

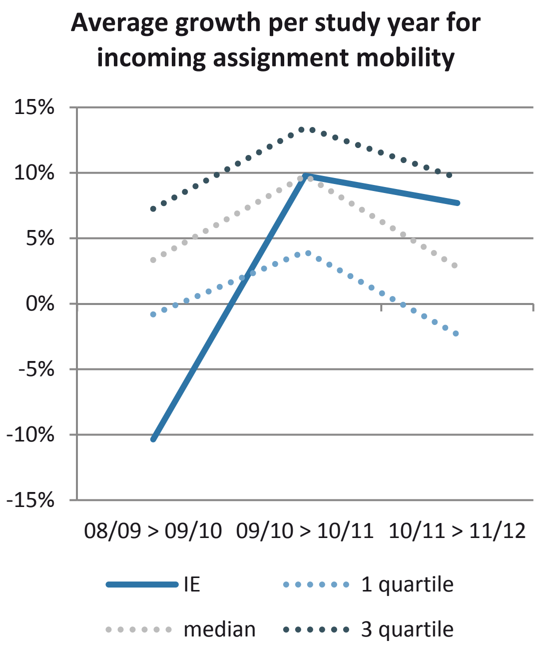
Top 5 host countries for training mobility

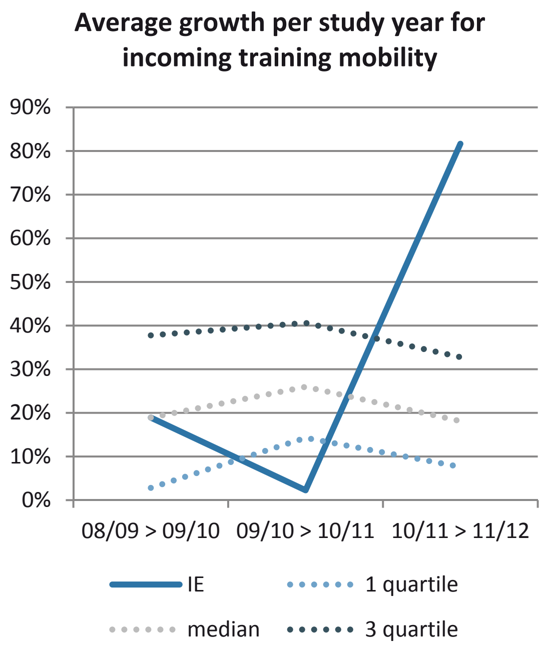
2008/09		2009/10		2010/11		2011/12	
FR	25%	**UK**	21%	**UK**	21%	**UK**	24%
UK	18%	**BE**	13%	**ES**	16%	**ES**	11%
DE	11%	**ES**	11%	**DE**	12%	**FR**	11%
NL	11%	**IT**	11%	**PL**	12%	**IT**	8%
DK	7%	**NL**	11%	**BE**	7%	**DE**	7%

4. Incoming staff mobility

Number of incoming staff by type of mobility, share of staff coming for trainings







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
DE	17%	**FR**	16%	**DE**	15%	**FR**	17%
FR	16%	**DE**	15%	**ES**	15%	**DE**	13%
ES	13%	**ES**	14%	**FR**	13%	**ES**	10%
BE	6%	**BE**	7%	**IT**	8%	**FI**	8%
AT	5%	**AT**	6%	**BE**	6%	**BE**	6%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	28%	**ES**	30%	**ES**	35%	**ES**	23%
FI	10%	**FR**	14%	**PL**	16%	**FI**	13%
DE	9%	**DE**	11%	**CZ**	8%	**PL**	11%
CZ	7%	**FI**	7%	**FI**	6%	**CH**	8%
IT	7%	**PL**	7%	**FR**	4%	**IT**	7%

ITALY

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of students going abroad for Erasmus mobility has been increasing steadily in Italy during the economic crisis although the average growth per study year has been slowing down for outgoing study mobility, making Italy one of the Erasmus countries with lowest growth rates. At the same time, the number of students going abroad for placements has been increasing very quickly, especially in 2011/12, compared to the previous study year, giving Italy one of the highest growth rates for placement mobility. The share of mobile students in the total student population in Italy has been lower compared to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 1% in Italy while in all Erasmus countries the average share was 1.1%. During the years of economic crisis the share of mobile students increased only to 1.2% in Italy but to 1.5% in all Erasmus countries on average by 2011/12. The average duration abroad has been decreasing for study mobility and remained the same for placement mobility. Compared to the average duration for all Erasmus countries, students from Italy spend relatively more time abroad for studies and less time abroad for placements. The top destinations for students from Italy have remained mainly the same since 2008/09 with Spain, France, the UK and Germany being the most popular, although the share of students going to Spain for placements has been decreasing. The number of incoming students has also been increasing since 2008/09 although the average growth per study year has been relatively slow compared to other Erasmus countries. A large share of students still come to Italy from Spain, but the share of students coming from Poland for placements has been increasing steadily during the economic crisis.

Context

There have not been major negative effects caused by the crisis on Erasmus mobility in Italy according to the national agency. However, there have been cuts in the higher education sector and more families have started to have difficulties with employment and cannot support their children as much as earlier. The Erasmus grant for students has increased from €200 to €230 and there is national co-funding available for placement mobility since 2010/11. In 2011, regional public HEIs' expenditure for grants in support of international mobility has decreased as compared to 2008. Despite the EU budget increase, the national agency was not able to fully satisfy HEIs' requests for co-funding, due to the increasing number of participating institutions.

Reports from Erasmus students do not highlight particular changes to the motivations which can drive students toward undertaking an experience abroad: the main reason can be found in their academic and cultural background or can be connected to aspirations to one's own form of independence and to confront a new environment in the European context. Additionally, there are many expectations of the Erasmus programme's capacity to foster working careers: over 75% of students see the Erasmus period as very useful in his/her working career and the 70% consider a study period abroad as crucial for his/her curriculum in order to find a job. Almost 100% of students admit to be more likely to search for a job abroad after his/her Erasmus experience. The main obstacles for outgoing mobility have been the insufficient level of Erasmus grant and bureaucratic procedures. Substantial changes affecting the study or living or working conditions for foreign students in Italy have not occurred.

According to the observations of the national agency, the trends in 2012/13 have shown a continuation in the increase of student mobility numbers (for both study and placement mobility).

STAFF MOBILITY

Main trends

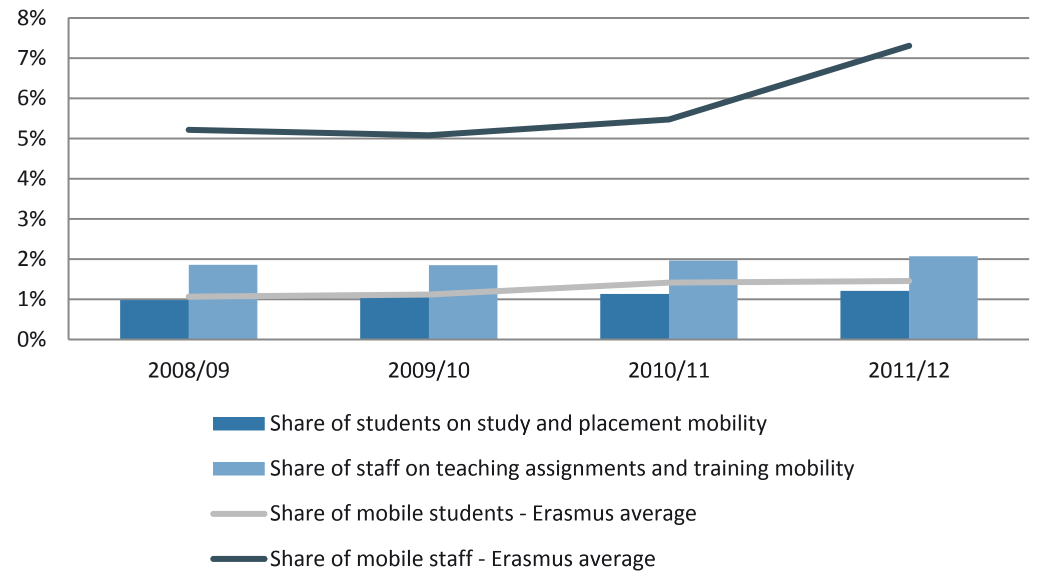
Similarly to outgoing student mobility, the numbers of staff going abroad has been increasing steadily since 2008/09 in Italy but compared to other Erasmus countries the average growth per study year has been rather slow. Italy used to have one of the fastest increasing numbers of outgoing training mobility in 2009/10 compared to the previous study year, but since then has one of the lowest growths in 2011/12. The share of mobile staff in Italy in the total staff population has been very low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 1.9% in Italy while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff increased to only 2.1% in Italy and to 7.3% in all Erasmus countries on average by 2011/12. The average time abroad for staff from Italy has been decreasing for training and increasing again after some initial decrease for assignments abroad. Nevertheless, staff from Italy stay abroad for a longer period of time on average compared to their colleagues from other Erasmus countries. The top five destinations for outgoing staff have not changed during the crisis, although the share of staff going to Spain for training has been decreasing. The number of incoming staff has also been increasing since 2008/09, but the average growth per study year has been relatively low for incoming assignment mobility and similar to the median growth for training mobility. Still, compared to other Erasmus countries Italy has the third highest number of incoming staff. The top five sending countries for incoming staff in Italy have mainly remained the same, with the exception of more staff coming from Poland for training now compared to 2008/09.

Context

Incoming Erasmus staff mobility is seen and used as a good opportunity for increasing internationalisation by HEIs and they offer many good possibilities for this (e.g. Erasmus Staff Week). At the moment, the Italian National Agency has not updated data about changes in staff salaries and working conditions since 2008 that also could have had a negative effect on staff mobility.

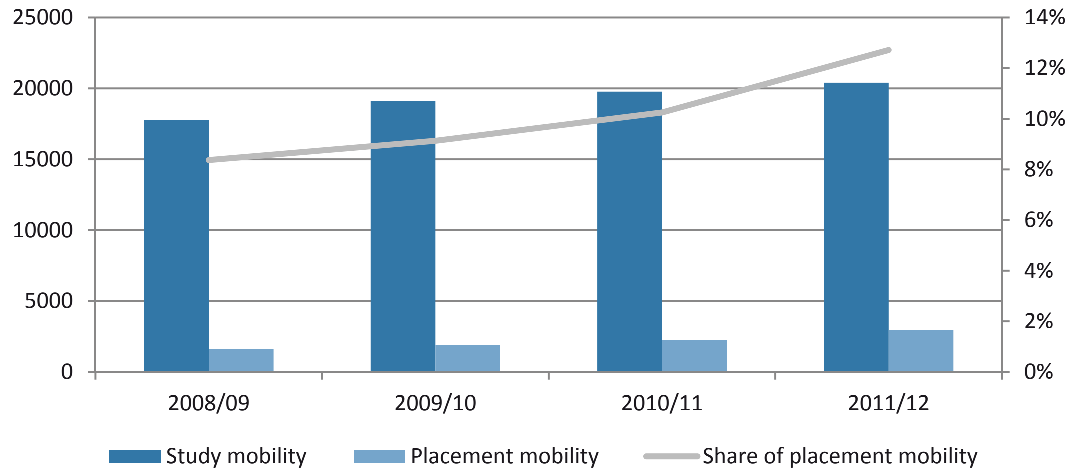
2. Data appendix

Share of mobile students and staff in Italy[12]

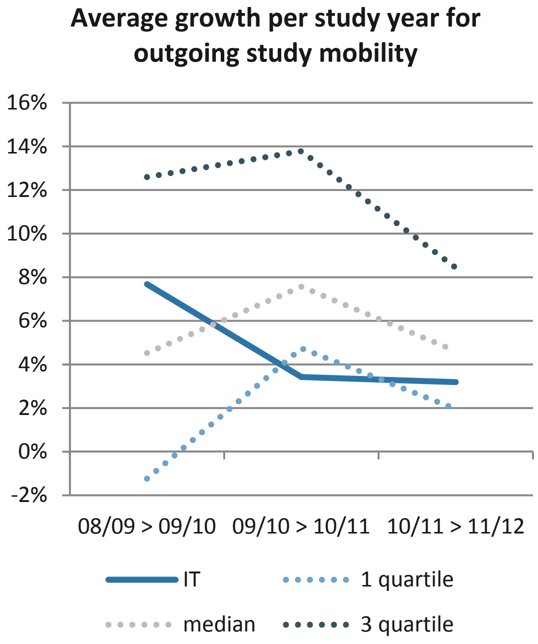


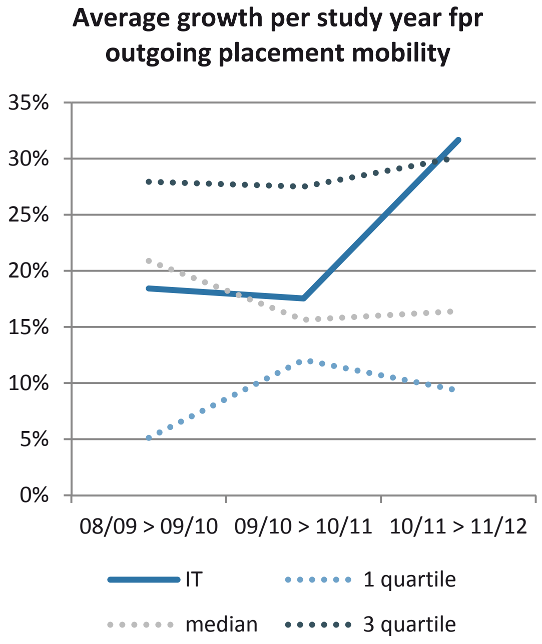
1. Outgoing student mobility

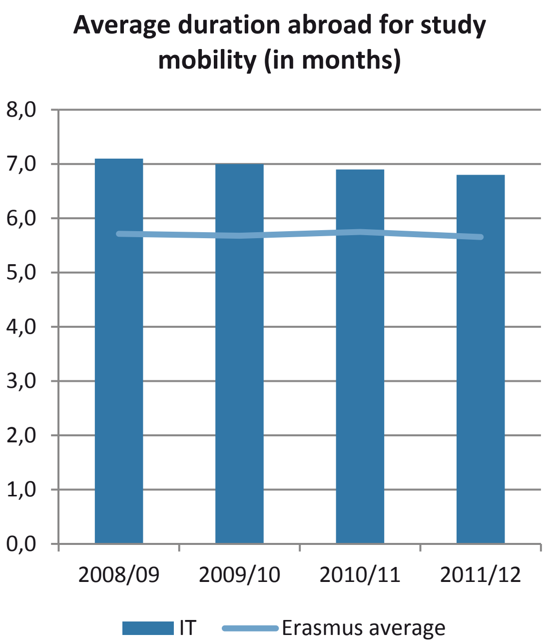
Number of outgoing students by type of mobility, share of mobile students going abroad for placements

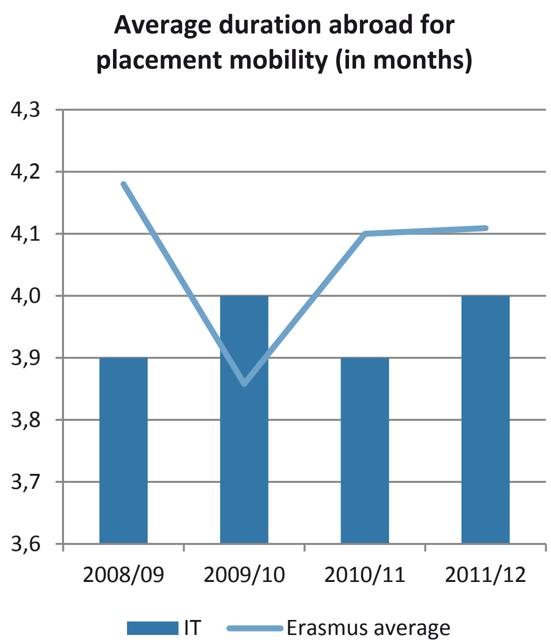


[12] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.


Average growth per study year for outgoing study mobility
16%
14%
12%
10%
8%
6%
4%
2%
0%
-2%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
IT
1 quartile
median
3 quartile


Average growth per study year fpr outgoing placement mobility
35%
30%
25%
20%
15%
10%
5%
0%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
IT
1 quartile
median
3 quartile


Average duration abroad for study mobility (in months)
8,0
7,0
6,0
5,0
4,0
3,0
2,0
1,0
0,0
2008/09
2009/10
2010/11
2011/12
IT
Erasmus average


Average duration abroad for placement mobility (in months)
4,3
4,2
4,1
4,0
3,9
3,8
3,7
3,6
2008/09
2009/10
2010/11
2011/12
IT
Erasmus average

Top 5 host countries for study mobility

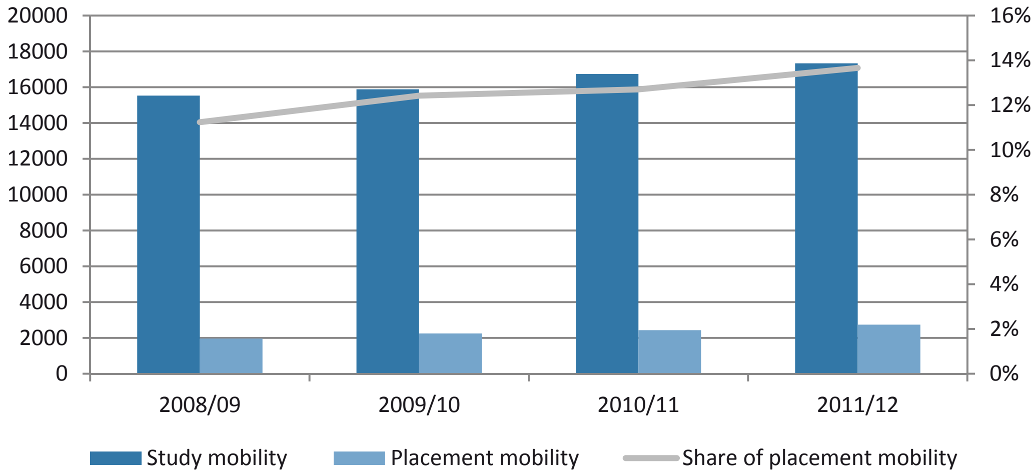
2008/09		2009/10		2010/11		2011/12	
ES	37%	**ES**	35%	**ES**	35%	**ES**	34%
FR	16%	**FR**	16%	**FR**	16%	**FR**	15%
DE	9%	**DE**	10%	**DE**	10%	**DE**	10%
UK	7%	**UK**	7%	**UK**	7%	**UK**	7%
PT	5%	**PT**	5%	**PT**	5%	**PT**	5%

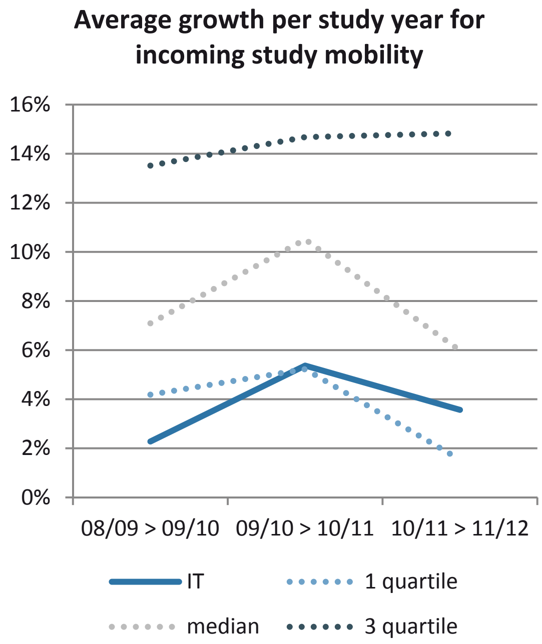
Top 5 host countries for placement mobility

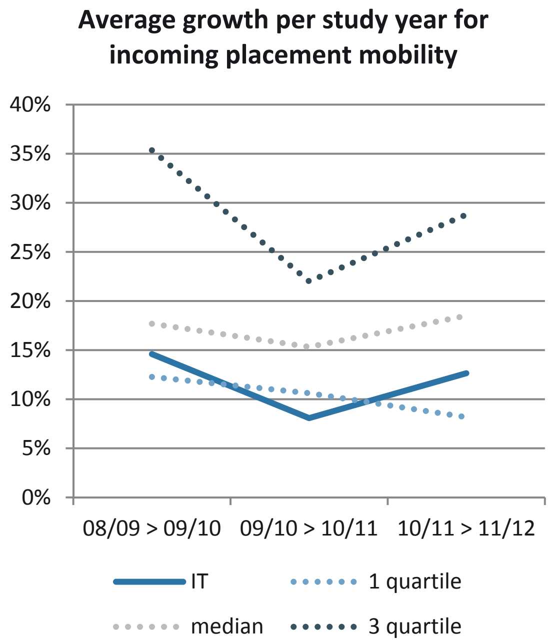
2008/09		2009/10		2010/11		2011/12	
ES	31%	**ES**	29%	**ES**	27%	**ES**	25%
UK	18%	**UK**	18%	**UK**	18%	**UK**	19%
FR	12%	**FR**	11%	**DE**	12%	**DE**	11%
DE	10%	**DE**	10%	**FR**	11%	**FR**	11%
BE	5%	**BE**	7%	**BE**	7%	**BE**	7%

2. Incoming student mobility

Number of incoming students by type of mobility, share of students coming for placements







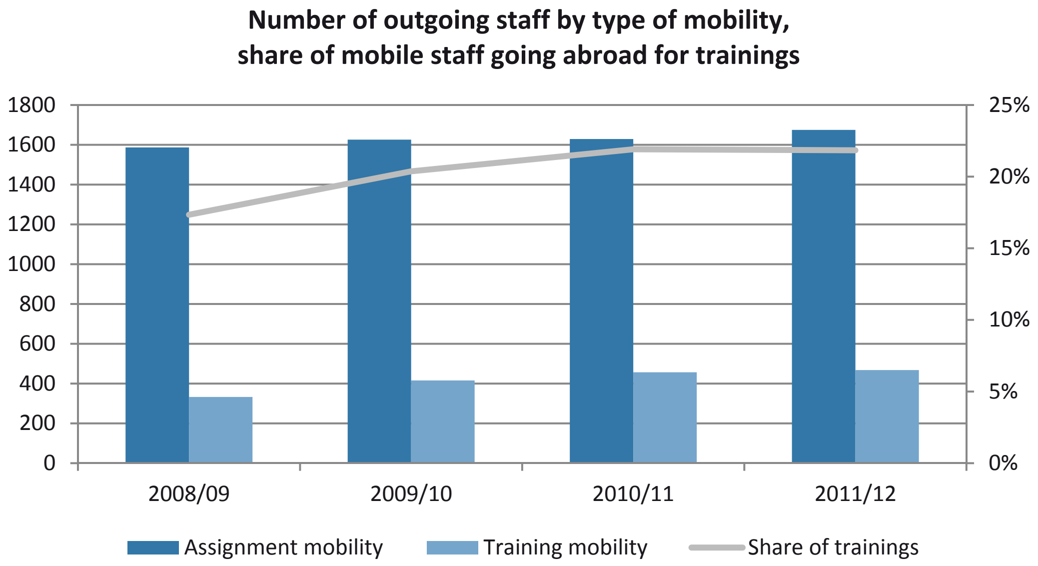
Top 5 sending countries for study mobility

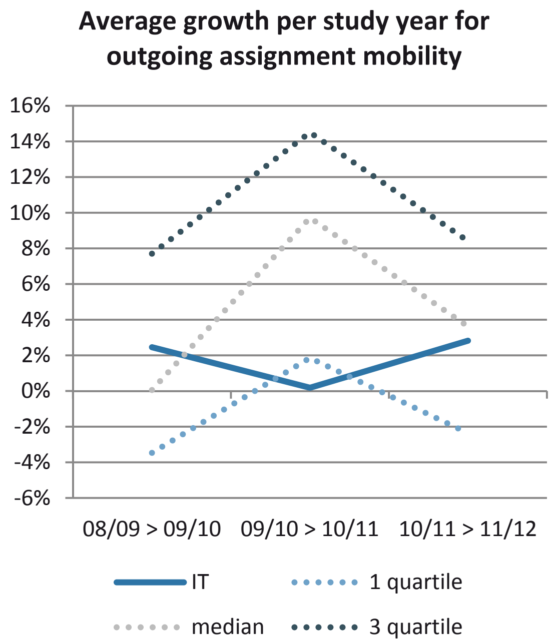
2008/09		2009/10		2010/11		2011/12	
ES	37%	**ES**	39%	**ES**	42%	**ES**	42%
FR	10%	**FR**	10%	**FR**	10%	**FR**	9%
DE	10%	**DE**	9%	**DE**	8%	**DE**	9%
PL	7%	**PL**	6%	**PL**	6%	**PL**	6%
PT	5%	**PT**	5%	**TR**	5%	**TR**	5%

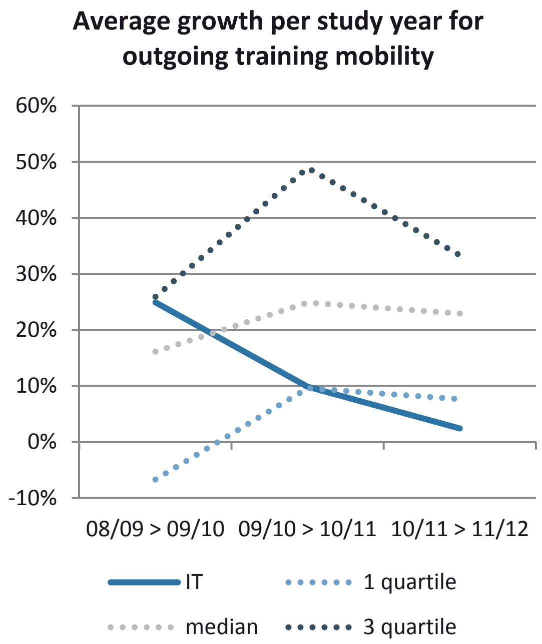
Top 5 sending countries for placement mobility

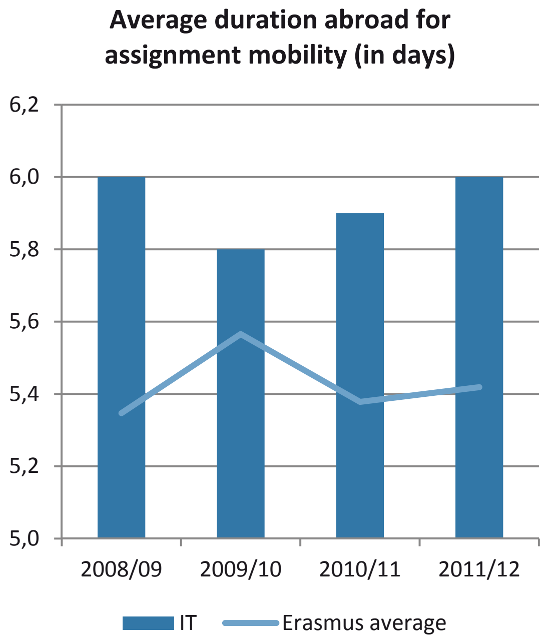
2008/09		2009/10		2010/11		2011/12	
ES	37%	**ES**	35%	**ES**	41%	**ES**	36%
DE	10%	**DE**	11%	**DE**	9%	**PL**	10%
FR	10%	**FR**	11%	**FR**	8%	**DE**	9%
UK	7%	**PL**	8%	**PL**	8%	**FR**	8%
NL	6%	**UK**	6%	**UK**	7%	**UK**	6%

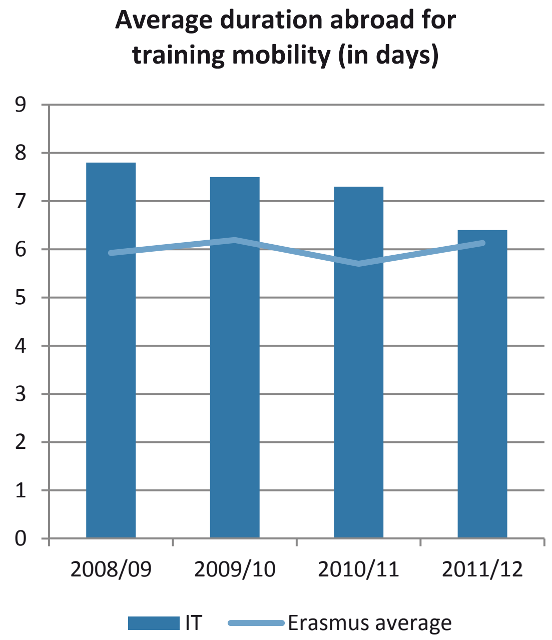
3. Outgoing staff mobility











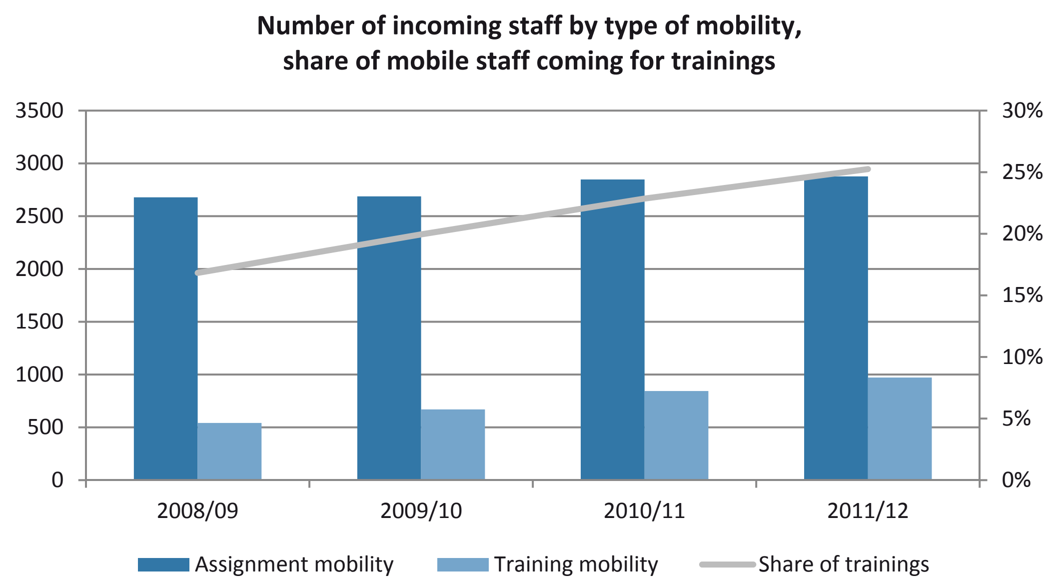
Top 5 host countries for assignment mobility

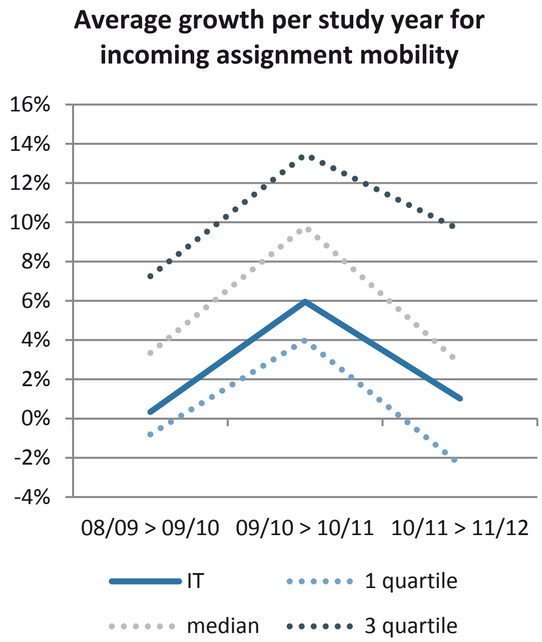
2008/09		2009/10		2010/11		2011/12	
ES	24%	**ES**	24%	**ES**	25%	**ES**	24%
FR	16%	**FR**	14%	**FR**	14%	**FR**	15%
DE	8%	**DE**	10%	**DE**	8%	**DE**	7%
UK	5%	**PL**	5%	**PL**	7%	**TR**	6%
PL	5%	**UK**	5%	**UK**	6%	**UK**	6%

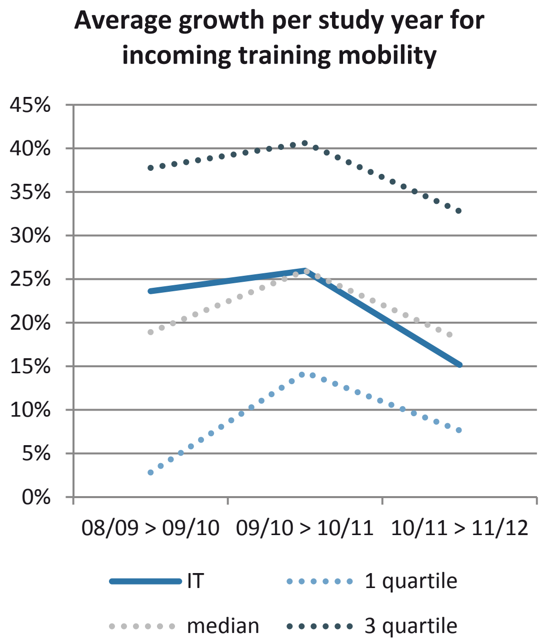
Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	34%	**ES**	30%	**ES**	28%	**ES**	24%
FR	12%	**FR**	13%	**FR**	11%	**UK**	12%
UK	12%	**UK**	11%	**UK**	10%	**FR**	9%
PL	5%	**DE**	8%	**DE**	9%	**DE**	8%
DE	5%	**PT**	5%	**PT**	6%	**PL**	7%

4. Incoming staff mobility







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
ES	30%	**ES**	26%	**ES**	28%	**ES**	25%
FR	12%	**FR**	14%	**FR**	10%	**PL**	11%
PL	11%	**PL**	9%	**PL**	10%	**FR**	10%
DE	8%	**DE**	9%	**DE**	8%	**DE**	8%
RO	5%	**RO**	6%	**TR**	6%	**TR**	6%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	26%	**ES**	29%	**ES**	30%	**ES**	25%
PL	16%	**PL**	18%	**PL**	19%	**PL**	21%
TR	8%	**RO**	10%	**TR**	8%	**RO**	7%
FI	7%	**TR**	7%	**RO**	7%	**TR**	6%
RO	6%	**FI**	5%	**FR**	5%	**LV**	5%

POLAND

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of outgoing students and staff has been increasing steadily in Poland since 2008/09 and the average growth per study year has also been increasing during the economic crisis, but these trends vary between different types of mobility. For outgoing student mobility the difference was the sharpest in 2009/10, when compared to the previous study year the number of students going abroad for studies actually decreased, whereas the number of students going for placements increased about 50% at the same time. Compared to other Erasmus countries, Poland had one of the slowest increasing numbers for outgoing student mobility in 2010/11 compared to the previous study year, but in 2011/12 the numbers started to increase faster making Poland more similar to median countries. The share of mobile students in Poland has been very low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 0.6% in Poland while in all Erasmus countries the average share was 1.1%. During the years of economic crisis the share of mobile students increased to 0.7% in Poland but to 1.5% in all Erasmus countries on average by 2011/12. At the same time, the duration of the mobility period has been decreasing during the economic crisis, although students from Poland still stay abroad for a longer period of time compared to students from other Erasmus countries on average for study mobility, but less so for placement mobility. The top five destinations for students from Poland have mainly remained the same since 2008/09 although Spain has become slightly more popular for both types of mobility and Greece is no longer in the top five host countries for placement mobility. At the same time, Poland is one of the Erasmus countries with the fastest increasing numbers for incoming student mobility (especially for study mobility), and this has not changed that much during the economic crisis. At the same time, the share of students going to Poland for placements has been relatively low compared to studies in Poland. The top five sending countries for studies and placements in Poland have remained mainly the same since 2008/09, although the share of incoming students from Spain has been increasing greatly but fewer students now go to Poland from Germany, France and Lithuania.

Context

The crisis has had its effect on higher education and families, but the impact on Erasmus mobility has not been visible yet. The accessibility to grants and loans has increased as Poland started to offer state grants also for students from private HEIs. State guarantees for loans to students, including students from low socioeconomic backgrounds are offered and are portable during the Erasmus mobility period. At the same time, the assumption made by the national agency is that this has not affected student mobility as the level of grants is not attractive enough and demands support from private sources, mostly from families. There are no tuition fees for full-time studies in public HEIs and this has not changed over the past few years. Private and public HEIs for part-time studies have not increased student fees substantially due to strong competition from the decreasing student population. All students have to pay small administration fees, the maximum level of which is defined annually by the education minister, but this has been stable during the economic crisis. The trends in Erasmus mobility in 2012/13 have been similar to the previous years.

The crisis has had a greater effect on families and their incomes (especially low-income families) which then affects their children's opportunities to go abroad. These are the families with students who might be very interested in mobility, but cannot afford it, as Erasmus grants do not cover all expenses and their families are not able to support that much. There is no national co-funding or support for students from lower socio-economic backgrounds for mobility, only a grant system for those studying in Poland (and not abroad). Only some HEIs offer their students co-funding for mobility, the national agency believes that this might be caused by the crisis, as the financial situation of HEIs is not that good to be able to offer support from their own budget.

More than financial issues, one of the increasing obstacles in student mobility seems to be, according to the assumptions of the national agency, a lack of motivation to apply for studies/placements abroad among all students – part of the student population is not sufficiently aware of benefits related to international learning mobility and is not willing to plan it as an integral part of their tertiary education. As travelling in Europe has become easy and accessible, students have become not that interested in making additional efforts to study abroad as was the case in the first years of Erasmus in Poland.

Demographic changes have been affecting private higher education in Poland as some private institutions have closed or merged. Students in private institutions are mostly part-time students who cannot afford or are not interested in going abroad as it would require at least a three month break from their work. According to the national agency this can, paradoxically, have a positive influence on Erasmus mobility as only stronger, more stable private institutions with ambitions and aspirations related to internationalisation might be involved in the programme.

There have not been any substantial changes related to opportunities of temporary work for students (local or incoming students) although the national agency believes that more students need a temporary job alongside their studies in order to cover their expenses. Although the living costs have increased in Poland, they are still relatively low compared to other countries which make Poland still attractive to incoming students and staff.

The constantly increasing incoming student mobility might be related to the fact that the number of mobile students has become one of the important factors in the institutional accreditation of HEIs – this has influenced their openness and readiness to host foreign students. Poland has become an increasingly popular host country for students from Turkey over the last years, which might be explained by the relatively easy visa procedures and also the flexibility of Polish HEIs to offer more individual consultation (although it is not recommended by the national agency since students lose opportunities for better integration with local students and local communities). At the same time, the share of students coming to Poland for placement mobility is relatively low as it is more difficult to find potential organisations for placements and foreign students also might have a prejudice of Poland being an "eastern-bloc" country and having no sufficient information about the present opportunities offered by Polish employers.

STAFF MOBILITY

Main trends

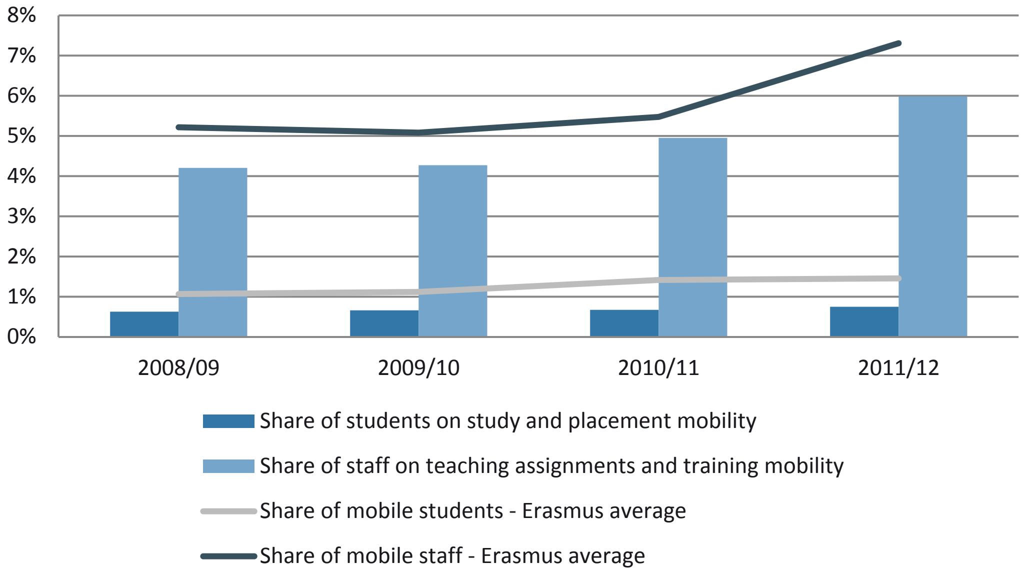
Similarly to outgoing study mobility, there was a decrease in the numbers of staff going abroad for teaching assignments in 2009/10 compared to the previous study year. Nevertheless, since then the numbers of staff going abroad from Poland have been increasing greatly, making Poland one of the Erasmus countries with the fastest average growth (especially for assignment mobility) during the crisis. Although the average growth slowed down in most of the countries in 2011/12 compared to the previous study year, Poland is one of the only countries with the opposite trend. The share of mobile staff in Poland has been also relatively low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 4.2% in Poland while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff increased to 6% in Poland and 7.3% in all Erasmus countries on average by 2011/12. Although the average duration abroad for staff from Poland has in general decreased since 2008/09 it is still mainly higher than the average duration for all Erasmus countries. The top five host countries for outgoing staff from Poland have not changed much since 2008/09 with Spain and Germany being the most popular destinations for training and teaching assignments. Poland has also had one of the highest average growth for incoming staff mobility although there was a temporary downturn in 2010/11 compared to the previous study year for incoming training mobility. The top sending countries for incoming assignment mobility in Poland has remained mainly the same, although the share of staff coming from Turkey has been increasing steadily and decreasing from France. The main sending countries for incoming training mobility have changed since 2008/09 with more staff going to Poland from Turkey and Spain now and less from Lithuania, Latvia or the Czech Republic.

Context

There have been moderate changes in the working conditions and salaries of academic staff – since 2011 there is a limitation for staff to be employed by more than one HEI. The national agency believes that this might have a positive effect on staff mobility as it might positively influence interrelation between staff mobility and HEIs staff development strategy. The salaries in public HEIs will increase in the near future, but it is unsure if and how this might affect mobility.

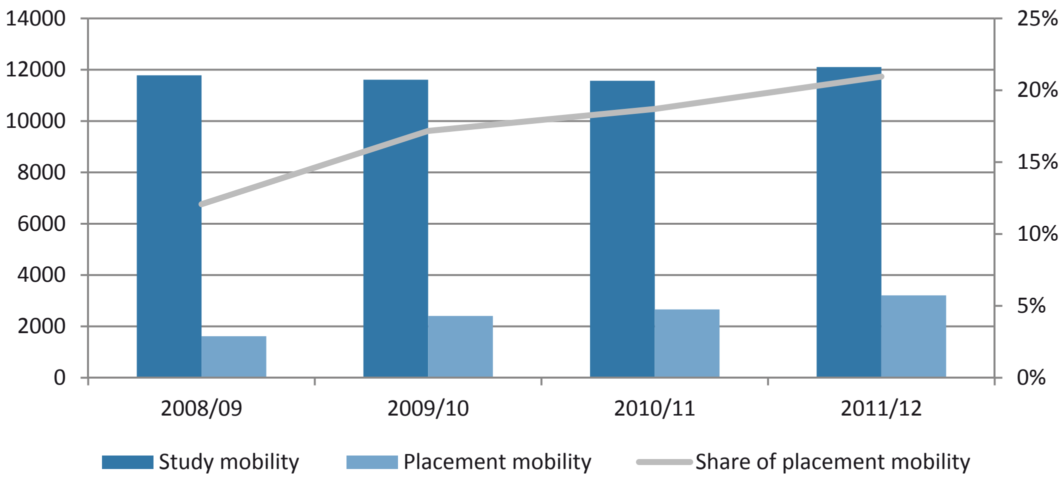
2. Data appendix

Share of mobile students and staff in Poland[13]



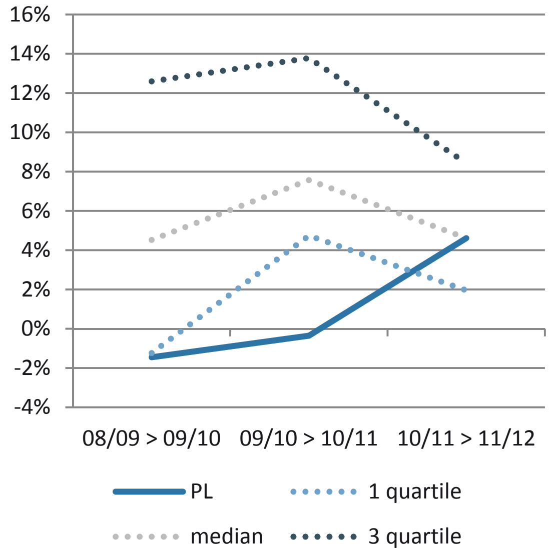
1. Outgoing student mobility

Number of outgoing students by type of mobility, share of mobile students going abroad for placements

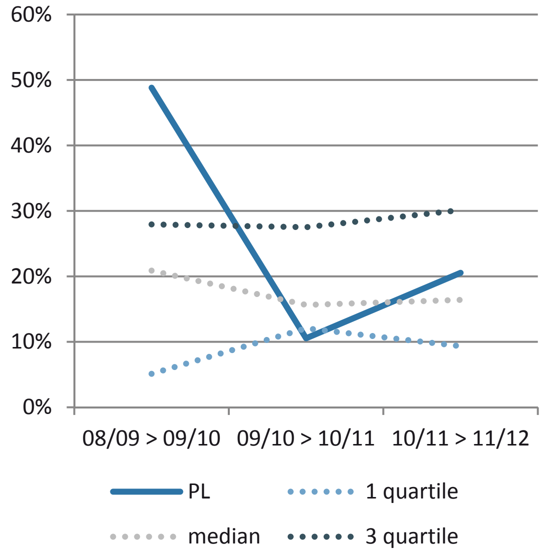


[13] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.

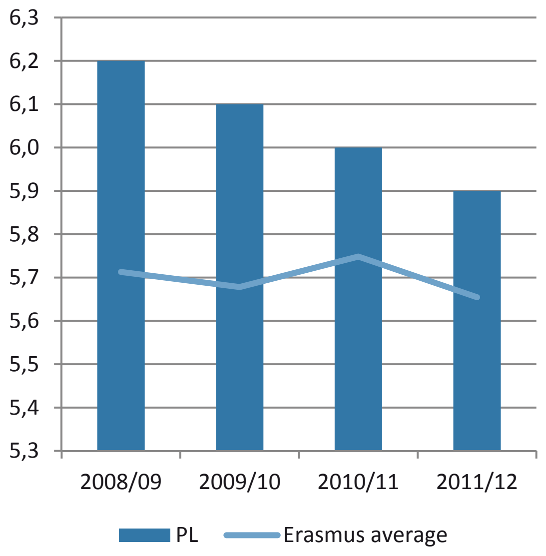
Average growth per study year for outgoing study mobility



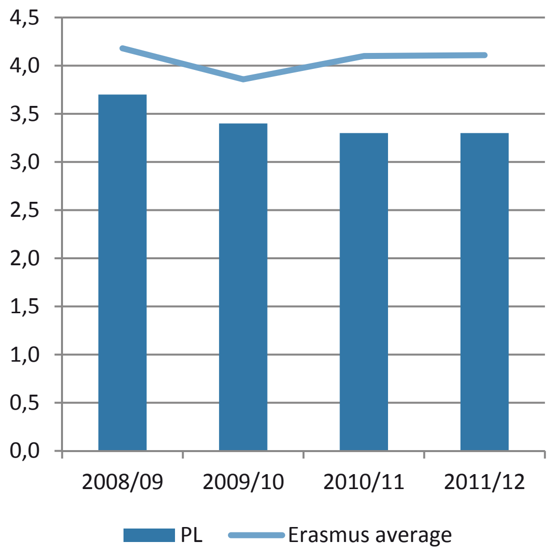
Average growth per study year for outgoing placement mobility



Average duration abroad for study mobility (in months)



Average duration abroad for placement mobility (in months)



Top 5 host countries for study mobility

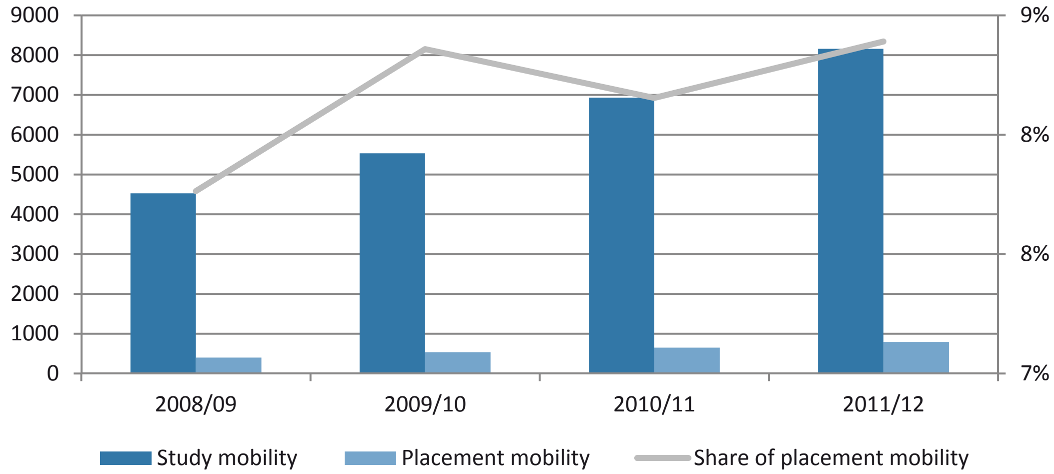
2008/09		2009/10		2010/11		2011/12	
DE	16%	**DE**	15%	**ES**	16%	**ES**	18%
ES	13%	**ES**	15%	**DE**	14%	**DE**	14%
FR	9%	**FR**	9%	**IT**	9%	**IT**	9%
IT	9%	**IT**	9%	**FR**	8%	**PT**	9%
PT	6%	**PT**	7%	**PT**	8%	**FR**	9%

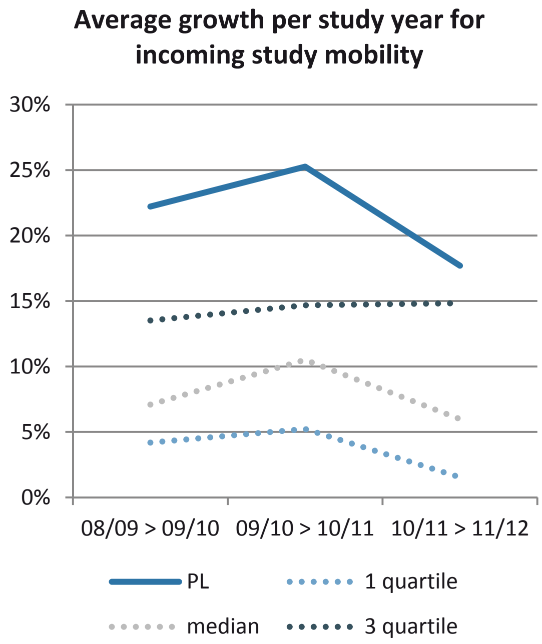
Top 5 host countries for placement mobility

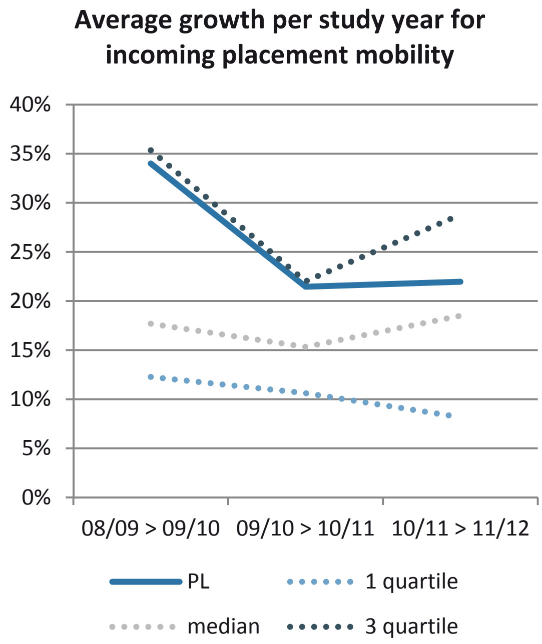
2008/09		2009/10		2010/11		2011/12	
DE	21%	**ES**	17%	**ES**	22%	**ES**	18%
GR	15%	**DE**	15%	**DE**	17%	**DE**	17%
ES	14%	**GR**	12%	**UK**	10%	**UK**	9%
UK	11%	**UK**	11%	**IT**	7%	**IT**	8%
IT	7%	**IT**	8%	**GR**	7%	**FR**	7%

2. Incoming student mobility

Number of incoming students by type of mobility, share of students coming for placements







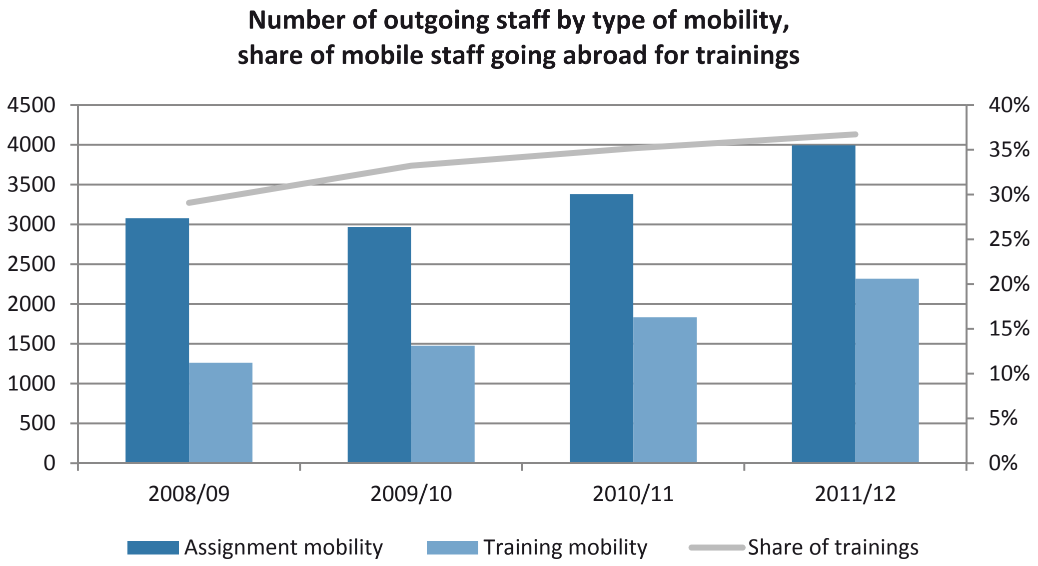
Top 5 sending countries for study mobility

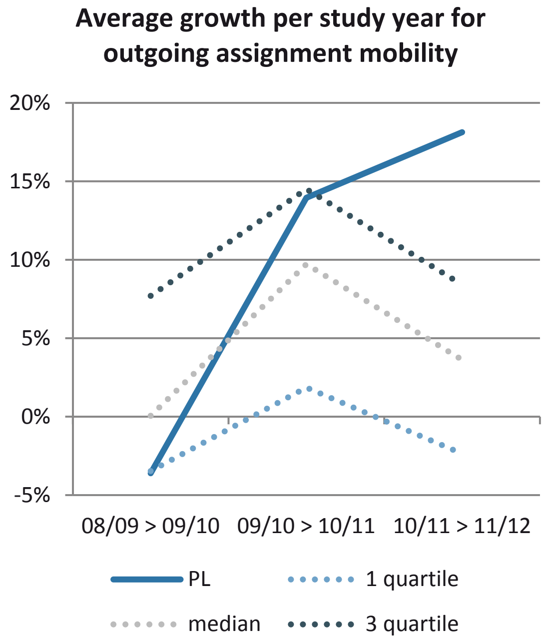
2008/09		2009/10		2010/11		2011/12	
TR	19%	**ES**	22%	**ES**	25%	**ES**	28%
ES	18%	**TR**	20%	**TR**	21%	**TR**	23%
DE	13%	**FR**	11%	**FR**	10%	**DE**	9%
FR	12%	**DE**	11%	**DE**	10%	**PT**	9%
PT	9%	**PT**	9%	**PT**	9%	**FR**	8%

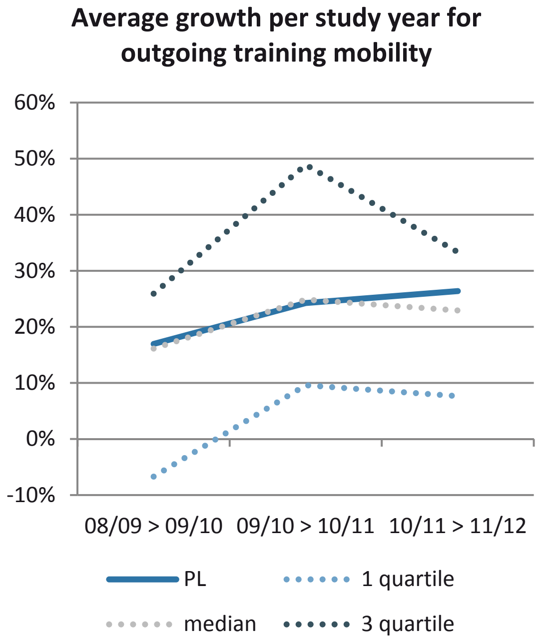
Top 5 sending countries for placement mobility

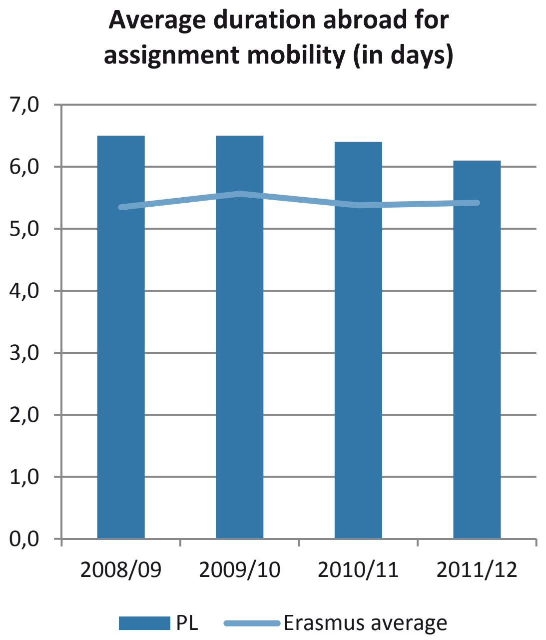
2008/09		2009/10		2010/11		2011/12	
DE	19%	**ES**	20%	**ES**	25%	**ES**	31%
FR	14%	**DE**	18%	**DE**	14%	**TR**	12%
ES	13%	**FR**	13%	**FR**	12%	**FR**	10%
LT	10%	**LT**	10%	**TR**	10%	**DE**	9%
TR	10%	**TR**	7%	**LT**	6%	**PT**	5%

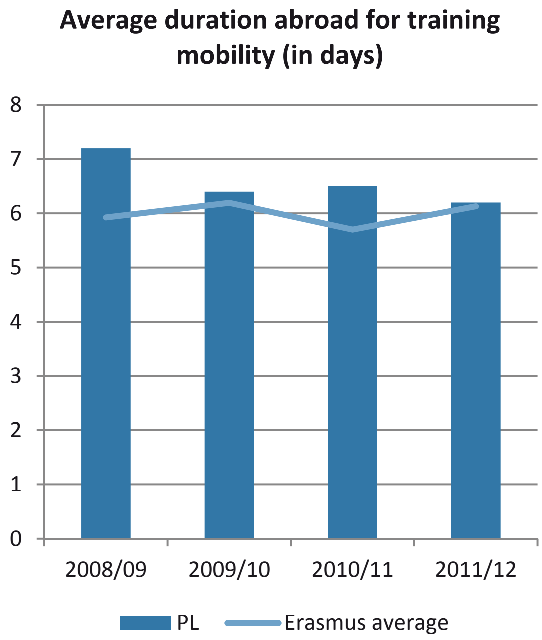
3. Outgoing staff mobility











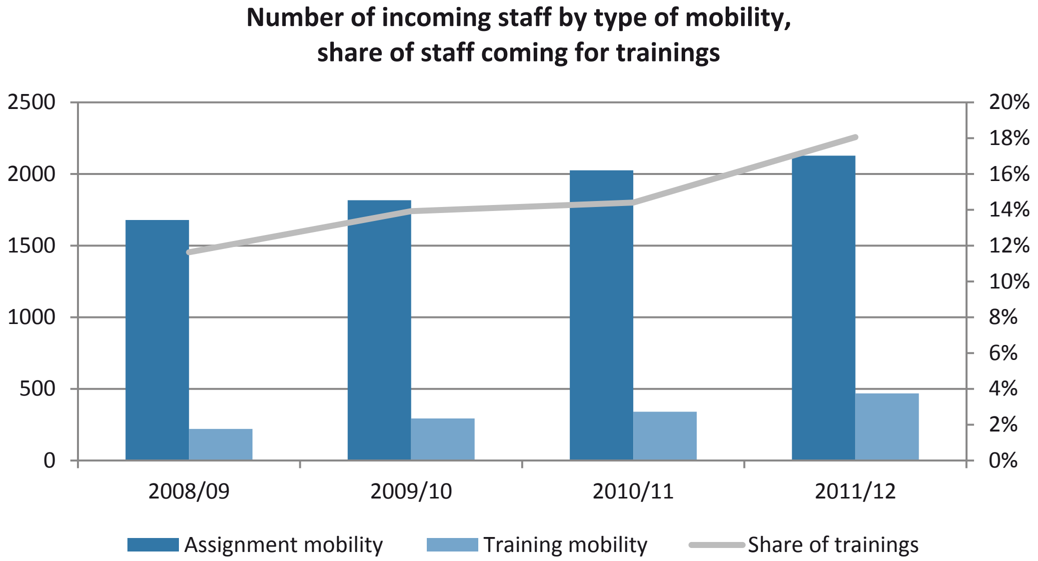
Top 5 host countries for assignment mobility

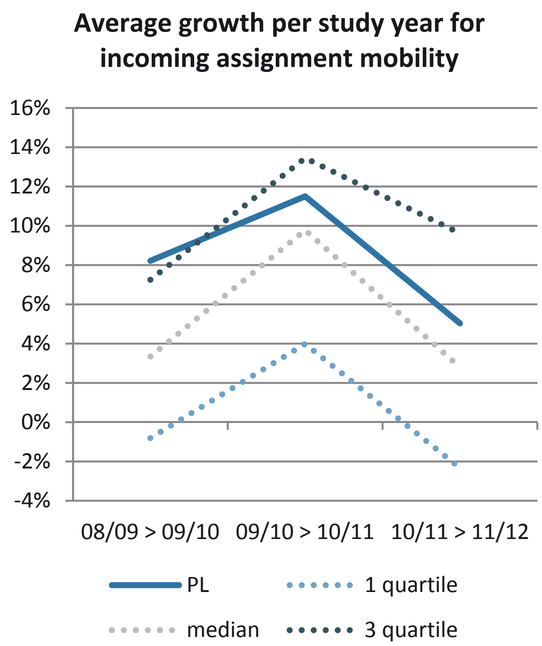
2008/09		2009/10		2010/11		2011/12	
DE	15%	**DE**	15%	**DE**	13%	**ES**	13%
ES	10%	**ES**	12%	**ES**	13%	**DE**	13%
IT	10%	**IT**	8%	**CZ**	9%	**CZ**	10%
CZ	8%	**CZ**	8%	**IT**	8%	**SK**	10%
SK	8%	**SK**	7%	**SK**	8%	**IT**	8%

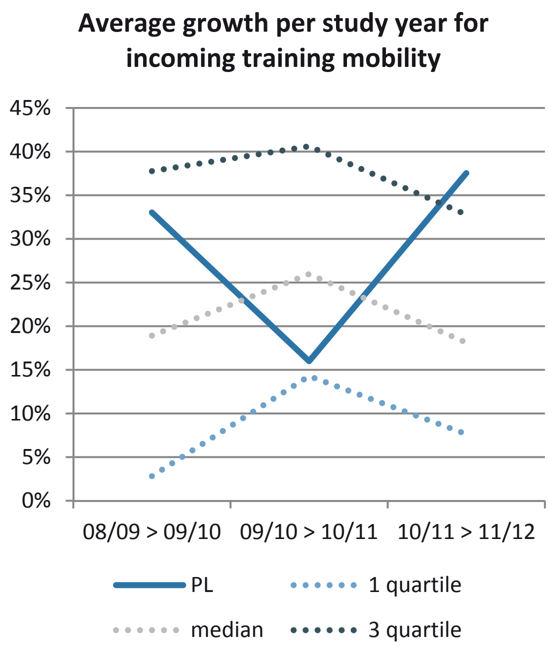
Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
DE	13%	**ES**	12%	**ES**	13%	**ES**	12%
ES	11%	**DE**	10%	**DE**	11%	**DE**	12%
UK	10%	**UK**	10%	**UK**	10%	**IT**	9%
CZ	8%	**IS**	9%	**IT**	9%	**UK**	8%
IT	7%	**IT**	8%	**PT**	6%	**PT**	7%

4. Incoming staff mobility







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
DE	16%	**DE**	16%	**DE**	17%	**DE**	16%
CZ	13%	**FR**	12%	**CZ**	11%	**TR**	12%
FR	13%	**CZ**	10%	**TR**	10%	**CZ**	11%
TR	7%	**TR**	9%	**FR**	10%	**FR**	9%
ES	7%	**ES**	8%	**ES**	8%	**ES**	8%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
LT	12%	**TR**	21%	**TR**	17%	**TR**	18%
ES	10%	**ES**	13%	**ES**	12%	**ES**	15%
TR	10%	**LV**	7%	**LV**	9%	**LV**	8%
LV	10%	**UK**	6%	**CZ**	6%	**DE**	7%
CZ	8%	**FR**	6%	**FR**	6%	**IT**	7%

PORTUGAL

1. Summary of analysis

STUDENT MOBILITY

Main trends

During the economic crisis the numbers of outgoing students and staff in Portugal have been mainly increasing since 2008/09 although the average growth per study year started to slow down for student mobility and the number of staff going abroad actually decreased in 2011/12 compared to the previous study year. However, these trends depend on the type of mobility analysed. For outgoing students, placement mobility has become more popular during those years and in international comparison Portugal is one of the Erasmus countries with the fastest increasing number of students going abroad for placements each study year. The share of mobile students in the total student population in Portugal has been relatively high compared to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 1.5% in Portugal while in all Erasmus countries the average share was 1.1%. During the years of economic crisis the share of mobile students increased to 1.7% in Portugal and to 1.5% in all Erasmus countries on average by 2011/12. Students from Portugal also stay abroad for placements for a longer period of time compared to students from other Erasmus countries on average and this duration has also been increasing during the crisis. Spain has been the most popular destination for students from Portugal (especially for placements) and this has not changed during the crisis. The number of incoming students has been increasing as well in Portugal since 2008/09 but the average growth per study year has been slowing down for both types of student mobility. Until 2009/10 Portugal was one of the Erasmus countries with the highest average growth, but since 2011/12 the average growth rate has been mostly similar with median countries.

Context

There have been several cuts in higher education sector budgets, a significant decrease in the number of students entering higher education (in 2013/14), as well as a decrease in study programmes and courses available; there also seems to be an increase in the number of drop-outs in higher education during recent years in Portugal, but there is no official data available to the public to support this. The public and private higher education sectors have both been affected by the crisis, but despite this students are still mobile. Mobility is very important for families and is seen as a family commitment, so even in times of crisis families will do their best to send their students abroad. However, a growing trend is becoming evident: if the family is able to afford mobility on their own, they rather send their children outside of Europe – to Brazil, USA, etc. According to the national agency, the crisis has had more impact on middle class students, because conditions in the social security system rather support low-income students (that receive several grants) and/or high-income students (who can afford to pay entirely for the mobility), but somehow leave the average income family students less protected and supported.

There have been substantial changes in the accessibility to student grants as the percentage of social services grantees in the public and private higher education sector has decreased by about 0.79% per year on average between 2008 and 2011. From 2009 until 2011 the Erasmus social support grants (BSE-SOC) maintained the same level, but more students applied for this grant. In 2012, as new changes in social grants were established, the national agency decided to increase the level of BSE-SOC grants. A student can only be awarded a BSE-SOC grant if he/she has a social services grant, and as the BSE-SOC grant depends of the level of the social grant, some of these amounts have decreased compared to past years, but in general the number of applicants and total amount of BSE-SOC expenditure have been stable, if not slightly increasing for this last year.

There has been a consistent growth in student loan numbers. This might not mean a better access to student loans, but probably a better dissemination of the banking product and, certainly, an increase in the need. There have been moderate changes to study costs: tuition fees are legally bound to rise no more than the inflation rate, which has been kept low due to several reasons such as the European Central Bank's monetary policy or the consumption cutback in recent years (related to the financial assistance programme constraints).

There has been a significant increase in transportation and accommodation costs, huge increase in VAT and other taxes, and parents' unemployment rates have been increasing significantly. Any work opportunities, either permanent, temporary, part-time, full-time or other have been decreasing from 2009 to 2012 and Portugal is one of the European countries where unemployment rates are more severe. All this can prevent young students and potential workers to come to Portugal, except for multinational companies or specific jobs. The living costs have increased significantly since 2008 and even taking into account that most Erasmus students coming to Portugal have considerably larger grants than outgoing students from Portugal, the prices in Portugal are not as attractive as they were before.

The trends in 2012/13 and beyond show some changes as there has been an increase in the numbers of outgoing placement mobility, possibly related to general migration movements in Portugal. In a recent study made by the national agency and the Centre for Economic Studies at the University of Coimbra (Impact assessment study on Erasmus and Leonardo da Vinci traineeships), it was noticed that among the student population going abroad for placements a significant number of students had an emigration tradition in their family (for instances their parents). The significant decrease in HEI admissions in 2013/14 might lead to a decrease in the share of low-income students in the higher education student population. What could be the effects of this trend to Erasmus mobility are yet to be seen.

STAFF MOBILITY

Main trends

The number of outgoing staff decreased in 2011/12 compared to the previous study year due to less staff going abroad for teaching assignments as the number of staff going abroad for training has been still increasing steadily since 2008/09 in Portugal. Nevertheless, in international comparison Portugal has become one of the Erasmus countries with the slowest increasing number for outgoing staff during the economic crisis although it used to be one of the top countries with the highest growth per study year for training mobility in 2009/10. The share of mobile staff in Portugal has been relatively low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 3.2% in Portugal while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff in Portugal increased up to 3.7% in 2010/11 and then decreased to 3.4% in 2011/12. In all Erasmus countries on average the share was 5.5% and 7.3% respectively. Staff from Portugal also stay abroad for a shorter period of time compared to their colleagues from other Erasmus countries on average, but this has not changed since 2008/09 much. At the same time, the number of incoming staff has been increasing steadily in the economic crisis turning Portugal from a country with the slowest average growth per study year into a country with one of the highest increasing number of incoming staff in 2011/12.

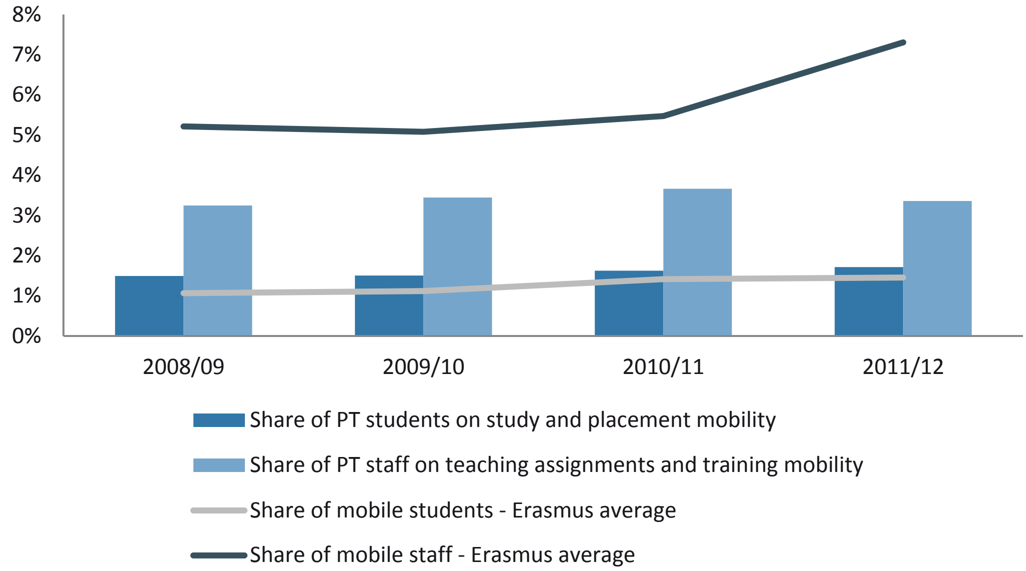
Context

There have been relevant changes to the working conditions and salaries of staff in Portugal: due to the decrease in higher education enrolment, a significant number of short-term contract professors have been dismissed. There has been no increase in wages, being the same since 2009. A special tax applied makes a salary cut between 3.5% and 10% since 2011. Also, other income taxes have increased, namely those for the social security system. All these financial constraints mentioned become more serious for staff especially when facing increasing expenses.

The Erasmus staff grants in Portugal were kept relatively low until recently. However, as the wages had significant cuts and HEIs also went under severe financial constraints, no additional support was easily given for staff mobility by the institutions anymore. This led to a substantial increase in Erasmus grants for staff in 2013, in order to avoid a decrease in staff mobility. According to the national agency, these changes have been seen as a good reason for staff to go abroad and establish an international path in their curricula. As Portuguese scientific production has been increasing quite significantly in all scientific areas, collaboration resulting from these mobility periods might be considered very useful.

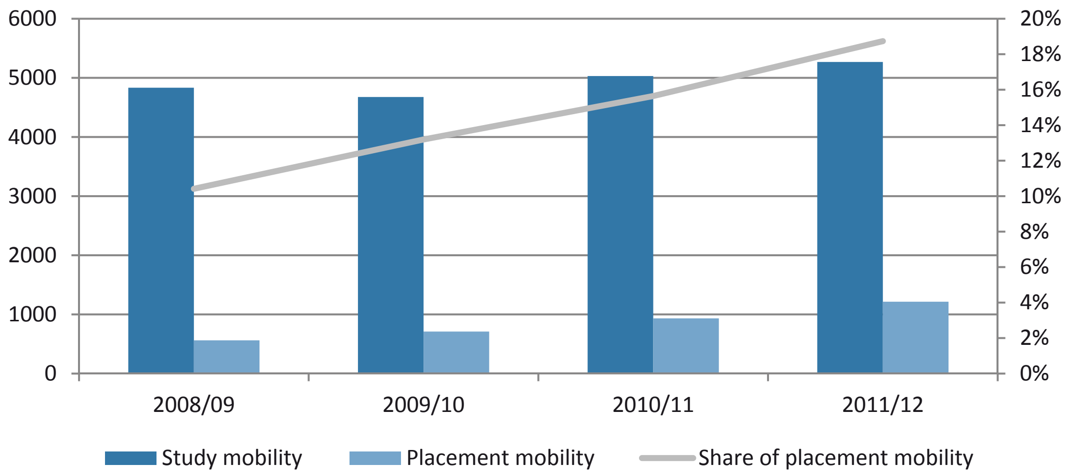
2. Data appendix

Share of mobile students and staff in Portugal[14]



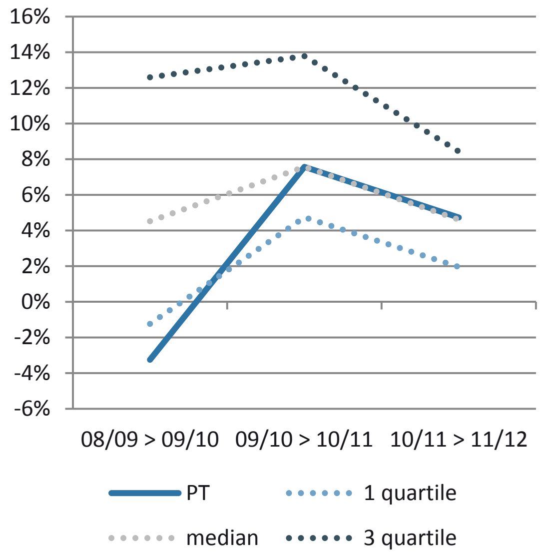
1. Outgoing student mobility

Number of outgoing students by type of mobility, share of mobile students going abroad for placements

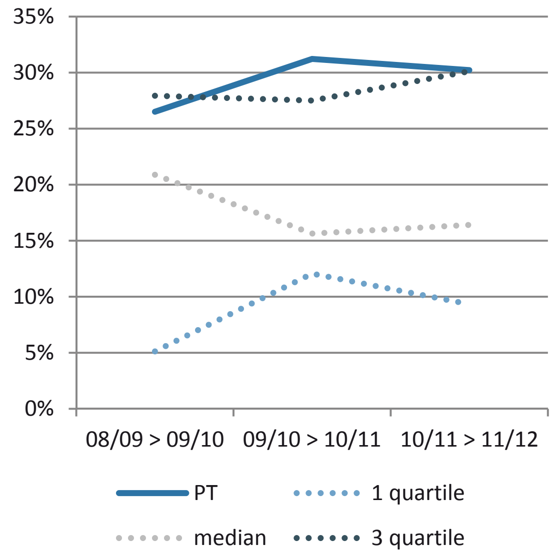


[14] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.

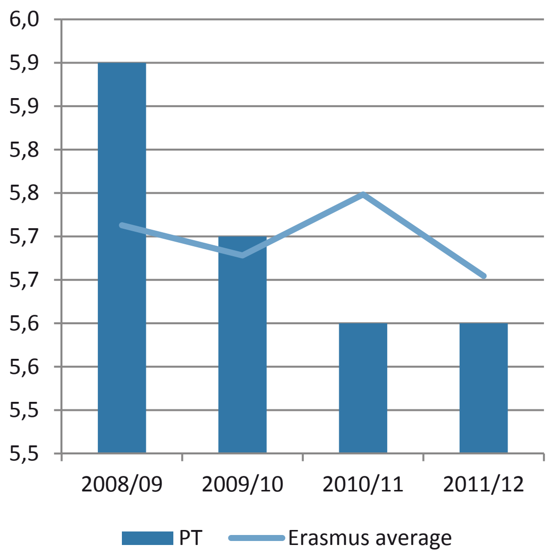
Average growth per study year for outgoing study mobility



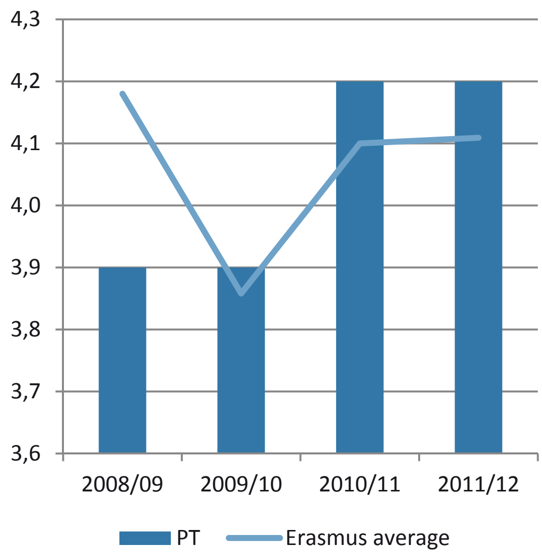
Average growth per study year for outgoing placement mobility



Average duration abroad for study mobility (in months)



Average duration abroad for placement mobility (in months)



Top 5 host countries for study mobility

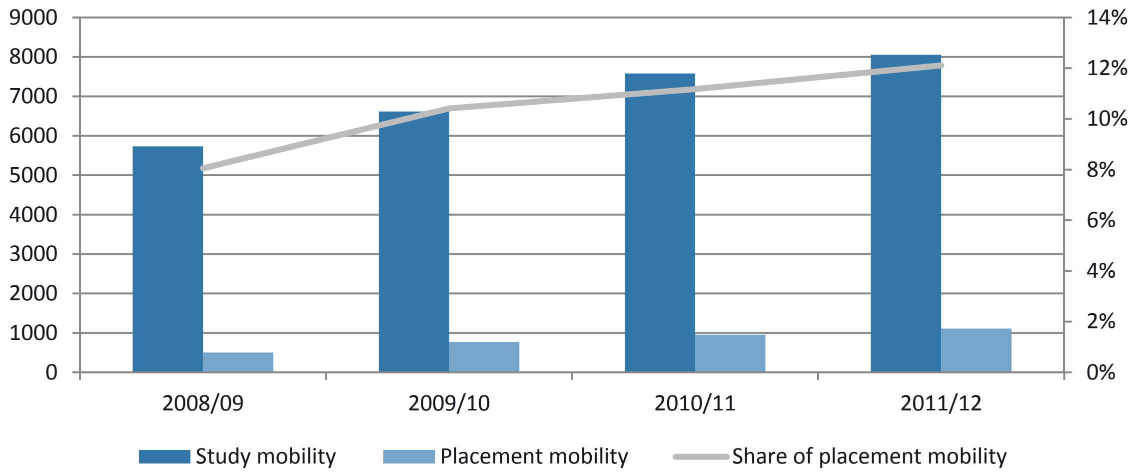
2008/09		2009/10		2010/11		2011/12	
ES	24%	ES	22%	ES	21%	ES	20%
IT	18%	IT	18%	IT	16%	IT	14%
PL	9%	PL	11%	PL	13%	PL	14%
CZ	6%	CZ	6%	CZ	6%	CZ	6%
FR	6%	FR	5%	FR	5%	DE	5%

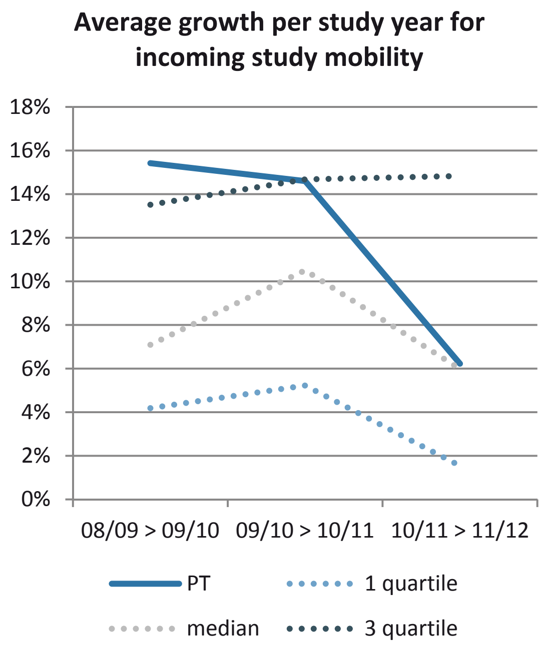
Top 5 host countries for placement mobility

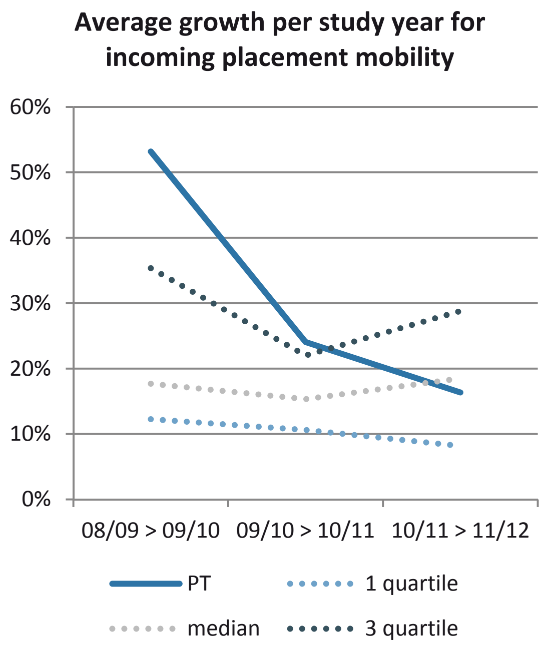
2008/09		2009/10		2010/11		2011/12	
ES	44%	ES	46%	ES	41%	ES	43%
FR	7%	IT	8%	IT	10%	UK	8%
IT	6%	UK	7%	UK	7%	IT	8%
BE	5%	BE	6%	FR	7%	DE	6%
UK	5%	FR	6%	BE	6%	FR	5%

2. Incoming student mobility

Number of incoming students by type of mobility, share of students coming for placements







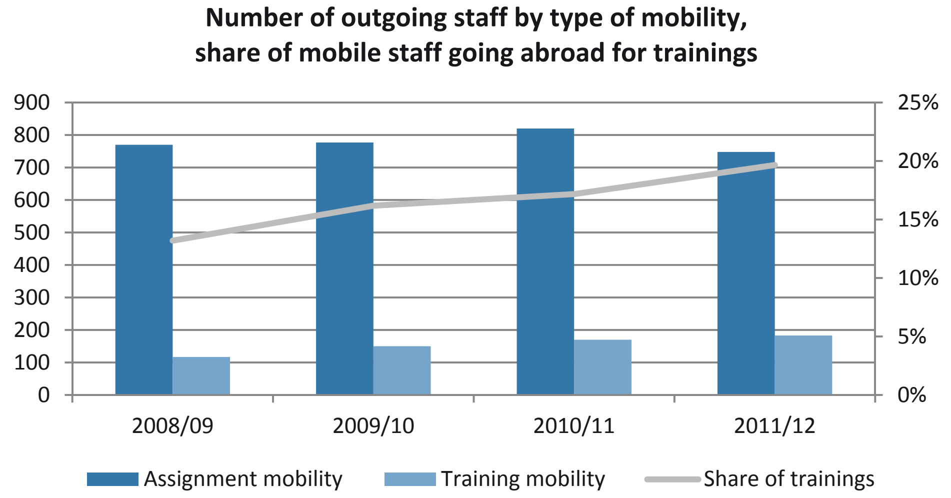
Top 5 sending countries for study mobility

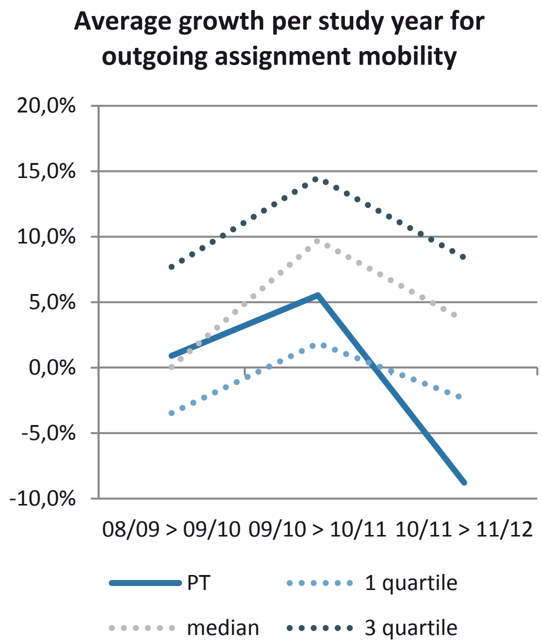
2008/09		2009/10		2010/11		2011/12	
ES	23%	**ES**	25%	**ES**	29%	**ES**	29%
IT	14%	**IT**	14%	**PL**	12%	**IT**	13%
PL	13%	**PL**	12%	**IT**	12%	**PL**	13%
DE	7%	**DE**	6%	**DE**	7%	**DE**	6%
TR	5%	**TR**	5%	**TR**	5%	**TR**	5%

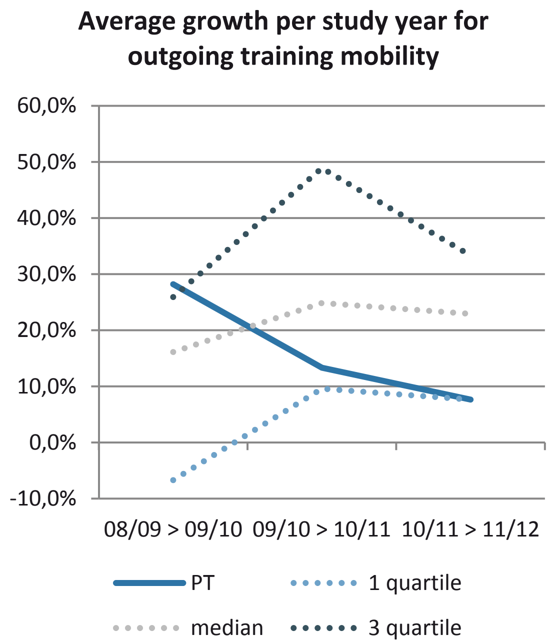
Top 5 sending countries for placement mobility

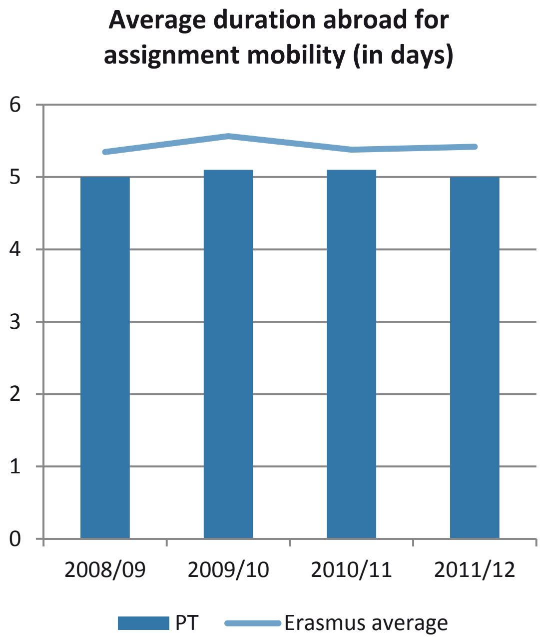
2008/09		2009/10		2010/11		2011/12	
ES	21%	**ES**	21%	**ES**	25%	**ES**	25%
PL	10%	**PL**	14%	**PL**	12%	**PL**	12%
DE	9%	**IT**	9%	**IT**	8%	**IT**	8%
FR	9%	**FR**	8%	**RO**	7%	**FR**	6%
IT	8%	**DE**	6%	**DE**	5%	**DE**	6%

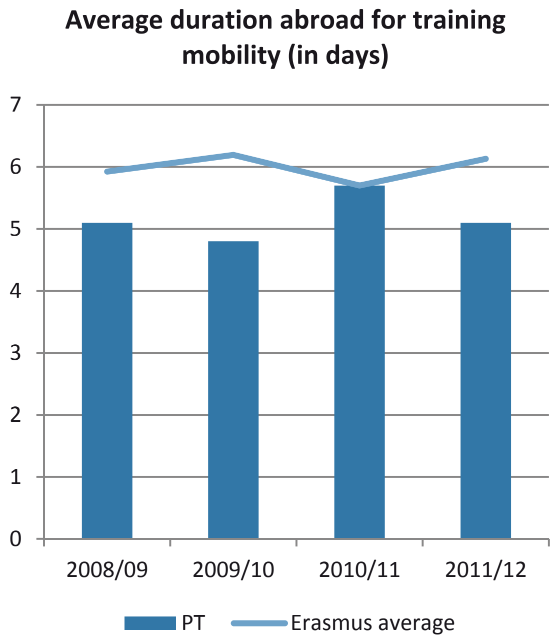
3. Outgoing staff mobility











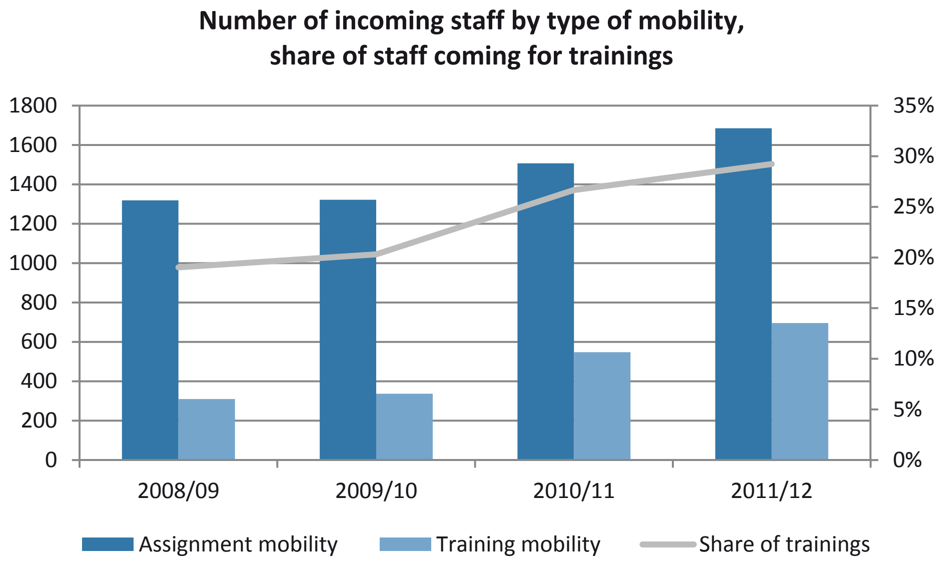
Top 5 host countries for assignment mobility

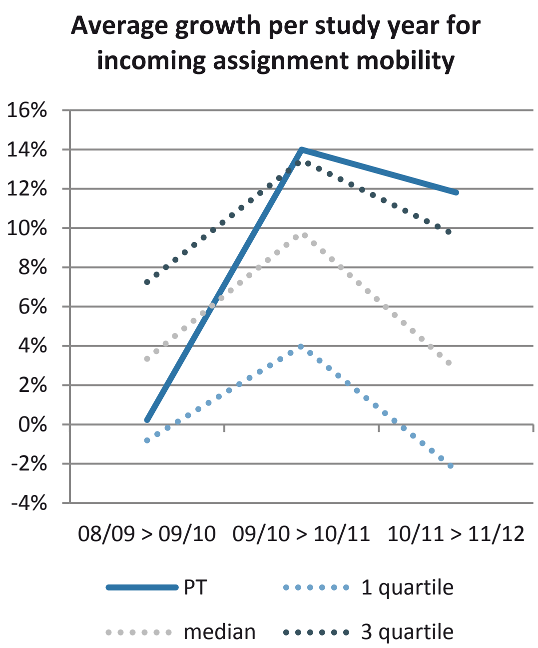
2008/09		2009/10		2010/11		2011/12	
ES	28%	**ES**	26%	**ES**	28%	**ES**	34%
IT	12%	**IT**	11%	**IT**	11%	**IT**	10%
FR	6%	**FR**	8%	**BE**	6%	**FR**	6%
FI	5%	**BE**	6%	**FR**	6%	**PL**	6%
BE	5%	**CZ**	5%	**PL**	5%	**DE**	4%

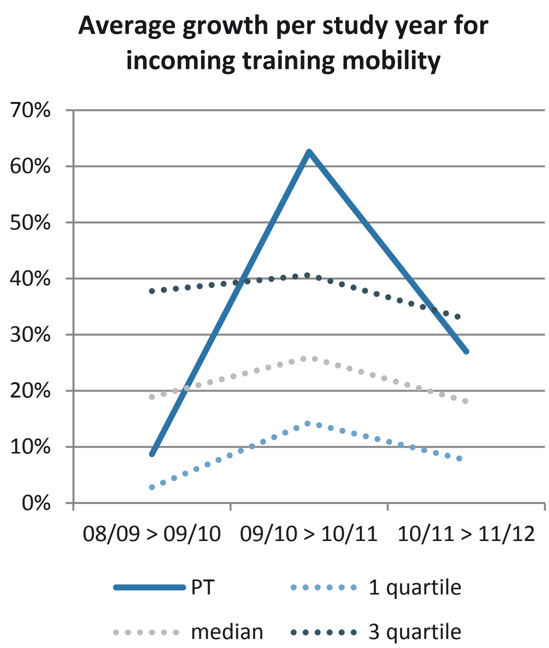
Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	26%	**ES**	33%	**ES**	37%	**ES**	30%
UK	11%	**UK**	9%	**IT**	11%	**IT**	9%
DE	8%	**FR**	9%	**BE**	6%	**HU**	7%
NL	7%	**FI**	7%	**DK**	5%	**PL**	7%
FI	6%	**NL**	7%	**PL**	5%	**FI**	5%

4. Incoming staff mobility







Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
ES	30%	**ES**	29%	**ES**	28%	**ES**	28%
PL	11%	**PL**	12%	**PL**	13%	**PL**	14%
CZ	8%	**FR**	7%	**IT**	6%	**TR**	6%
BE	6%	**IT**	6%	**BE**	6%	**IT**	5%
IT	6%	**CZ**	6%	**LT**	5%	**CZ**	5%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
PL	25%	**PL**	24%	**PL**	21%	**PL**	24%
ES	17%	**ES**	23%	**ES**	17%	**ES**	19%
CZ	7%	**RO**	10%	**RO**	7%	**RO**	6%
SI	5%	**IT**	6%	**IT**	5%	**TR**	5%
RO	5%	**LT**	6%	**TR**	5%	**CZ**	5%

SPAIN

1. Summary of analysis

STUDENT MOBILITY

Main trends

The number of outgoing students has been increasing in Spain during the economic crisis and the average growth per study year was also increasing but started to slow down in 2011/12 compared to the previous study year. Looking at the trends in outgoing study mobility Spain has had one of the highest average growth rates per study year, it used to be the case also for placement mobility, but the downturn in average growth in 2011/12 made Spain more similar to the Erasmus median. The share of mobile students in the total student population in Spain has been very high compared to the average share in all Erasmus countries: in 2008/09 the share of mobile students was 1.6% in Spain while in all Erasmus countries the average share was 1.1%. During the years of economic crisis the share of mobile students increased to 2.1% in Spain and 1.5% in all Erasmus countries on average by 2011/12. The average duration of studies abroad has remained the same and the average duration of placements abroad has been increasing during the crisis. Compared to the average duration in all Erasmus countries, students from Spain stay abroad for a longer period of time for studies but a shorter period of time for placements. The top five host countries for studies and placements for students from Spain have remained the same since 2008/09 although the share of students going to Italy has been decreasing. The number of incoming students in Spain has increased steadily since 2008/09 although the average growth per study year has been relatively slow for study mobility and similar to the Erasmus median for placement mobility. The top five sending countries have remained mainly the same since 2008/09 although the share of students coming for placements from Germany has been decreasing.

Context

According to the opinion of the national agency, the economic crisis has certainly had an effect on Erasmus mobility in Spain, especially in 2011/12 and 2012/13. As co-funding from the Ministry of Education and the regional governments for mobility have decreased considerably, more students have started to withdraw from Erasmus mobility as they are not able to cover the costs of mobility. Student mobility has been financed mainly by students' families in Spain and in the times of crisis more families are affected by unemployment and cannot afford to support their children's mobility aspirations.

These have been substantial changes to higher education funding system in Spain but these have occurred only in 2013 and not during the years observed in this analysis. At the beginning of 2013, the Ministry of Education approved a Royal Decree to increase tuition fees for national and foreign students in Spain. In addition, the registration fees for students who do not pass the evaluation of a subject have been increasing significantly: 30-40% for the second registration, up to 90-100% for the fourth registration. Since July 2013, the Ministry has also established different criteria in order to receive a needs-based grant (students has to have obtained at least a 6.5 average grade out of 10 in the previous academic year) or to have free registration in the first academic year (a minimum 5.5 average grade in the admission examinations).

There has been a significant increase in living costs during the past two years in Spain but in comparison to 2008, accommodation costs have decreased about 25% which means that it is now much cheaper for students to rent a flat in Spain than some years ago. The unemployment rate of young people in Spain is the highest in Europe, nearly 50% in the case of youth with higher education. The few job opportunities that are offered are mainly temporary jobs with low wages and mostly not compatible with the competences acquired in higher education. This is one of the main reasons why most Spanish graduates and postgraduates (Master's and doctorates) are leaving Spain to go to other European countries (engineers and architects) and to some Latin-American countries.

The national agency is expecting a decrease in student mobility numbers in the near future in Spain, not because of the economic crisis, but rather due to the changes in the Erasmus Programme itself, although it is not sure yet how these changes will affect mobility in general.

STAFF MOBILITY

Main trends

The number of outgoing staff has been increasing during the crisis and the average growth per study year has been showing similar trends to the average growth in all Erasmus countries: an increase in the average growth in 2010/11 compared to the previous study year was followed by a slowdown the next study year for both types of outgoing staff mobility. The share of mobile staff in Spain has been relatively low compared to the average share in all Erasmus countries: in 2008/09 the share of mobile staff was 3% in Spain while in all Erasmus countries the average share was 5.2%. During the years of economic crisis the share of mobile staff increased to 3.6% in Spain and to 7.3% in all Erasmus countries on average by 2011/12. The average duration of staff mobility abroad has decreased since 2008/09 and compared to the average duration in all Erasmus countries outgoing staff from Spain stays abroad for a shorter period of time for both types of mobility. The top five host countries for staff from Spain have remained mainly the same since 2008/09 although the share of staff going to Italy and the UK has been decreasing. The number of incoming staff has also been increasing in Spain and similarly to outgoing staff mobility the increase was the highest in 2010/11 compared to the previous study year and slowed down the next study year. For incoming assignment mobility, Spain has had one of the fastest increasing numbers but for incoming training mobility it has mostly had a slow average growth (except for 2010/11). The top five sending countries for incoming staff mobility have mainly remained the same during the crisis with a slight increase in the share of staff coming from Poland and a decrease of staff coming from France.

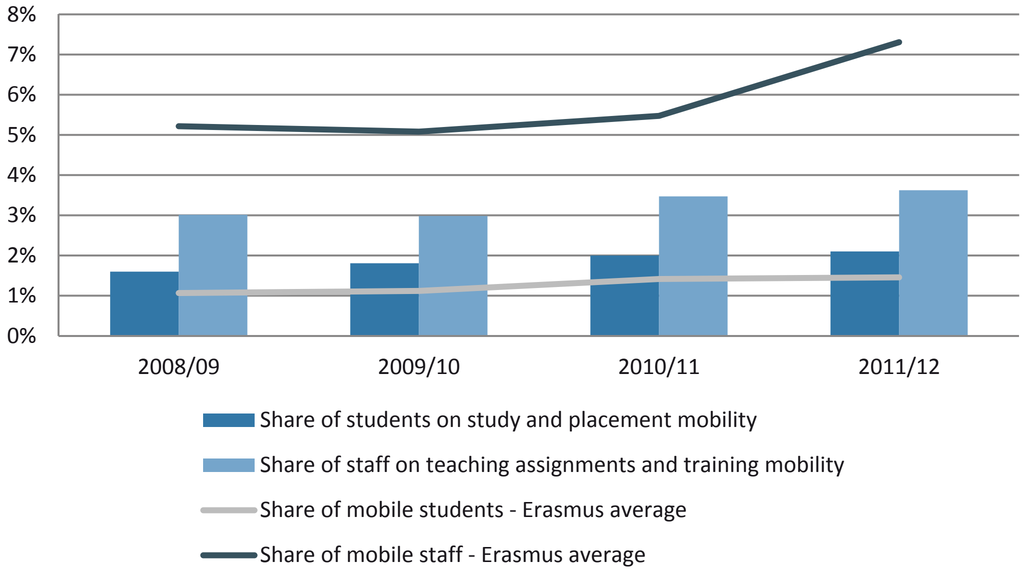
Context

Salaries (including extra wages) of staff have been reduced by approximately 12% in the last two years and it is foreseen that in 2014 there will be no increase. Also, due to the fact that grants from the

Spanish HEIs, the Ministry of Education and regional governments have been reduced due to the crisis, academic and research staff have increasingly started to apply to participate in training seminars and workshops. Short visits abroad are being seen as good opportunity to search for other professional perspectives in other countries. Thus, staff mobility numbers have increased but the duration has decreased. The national agency predicts that the number of outgoing staff will continue increasing in the near future as people see European funds as a very important source of funding for mobility opportunities.

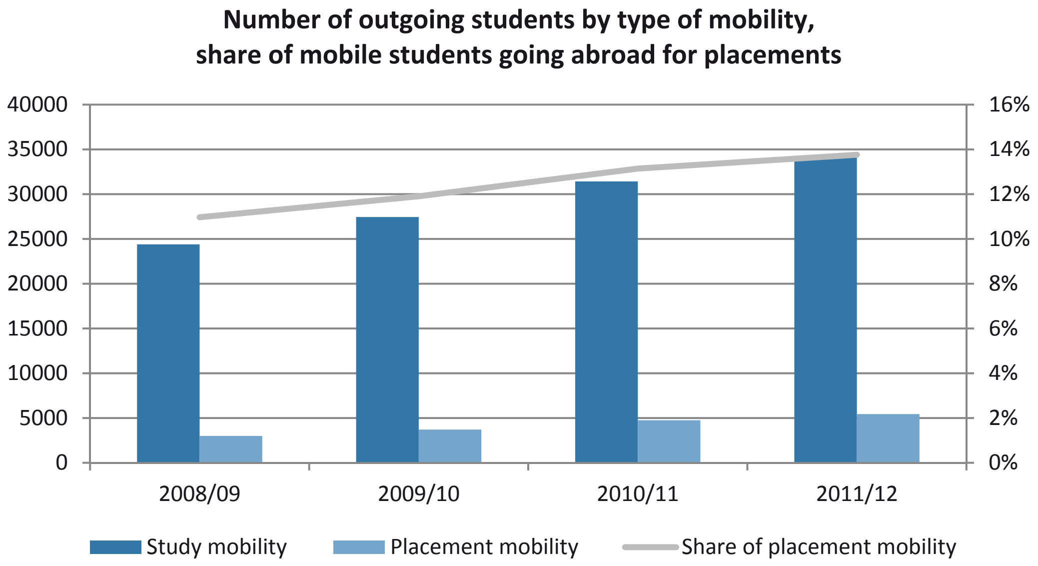
2. Data appendix

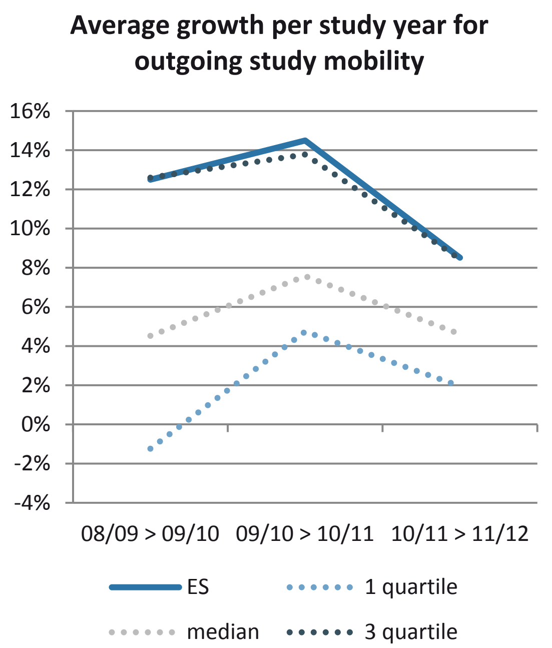
Share of mobile students and staff in Spain[15]

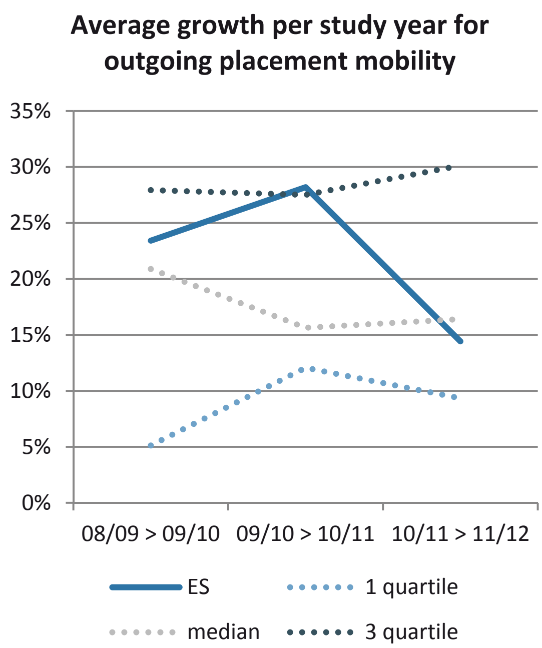


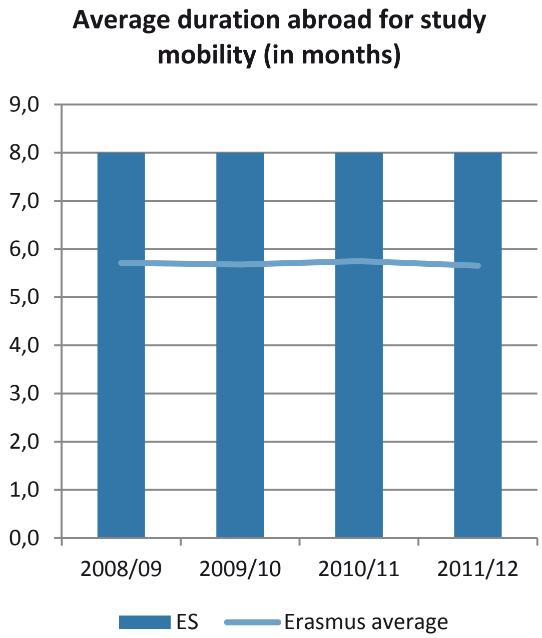
1. Outgoing student mobility

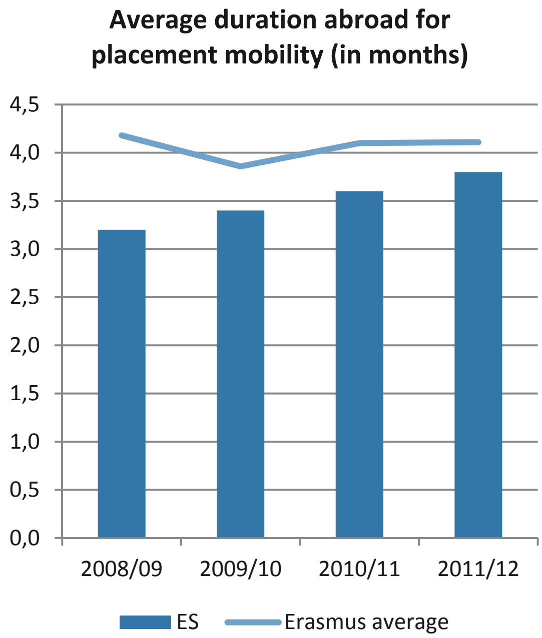
[15] Calculations based on Eurostat data: total number of students (ISCED 5a+5b) and total number of academic staff (ISCED 5+6) in full-time equivalent.


Number of outgoing students by type of mobility,
share of mobile students going abroad for placements
40000
35000
30000
25000
20000
15000
10000
5000
0
16%
14%
12%
10%
8%
6%
4%
2%
0%
2008/09
2009/10
2010/11
2011/12
Study mobility
Placement mobility
Share of placement mobility


Average growth per study year for
outgoing study mobility
16%
14%
12%
10%
8%
6%
4%
2%
0%
-2%
-4%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
ES
1 quartile
median
3 quartile


Average growth per study year for
outgoing placement mobility
35%
30%
25%
20%
15%
10%
5%
0%
08/09 > 09/10
09/10 > 10/11
10/11 > 11/12
ES
1 quartile
median
3 quartile





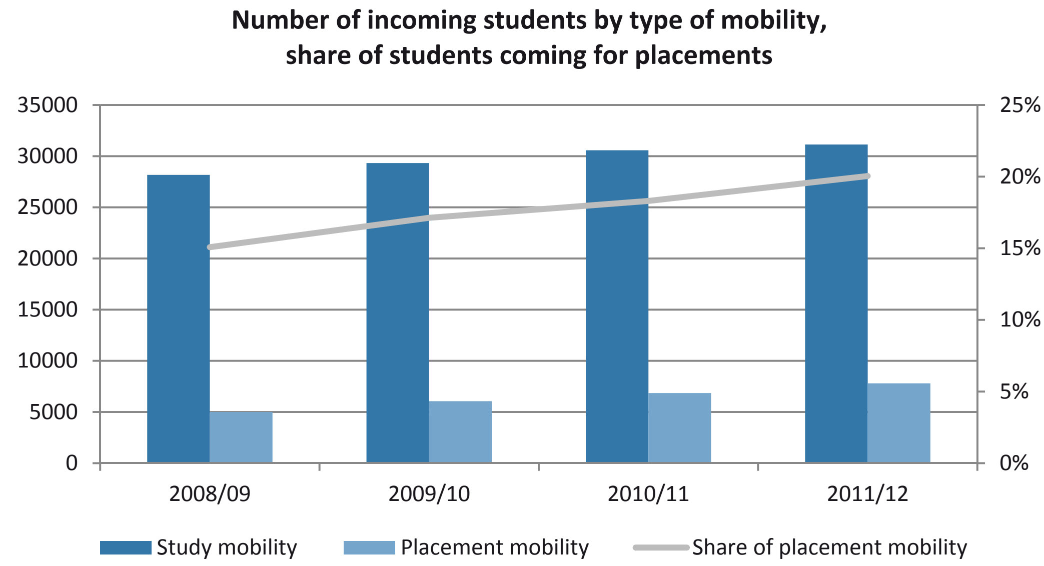
Top 5 host countries for study mobility

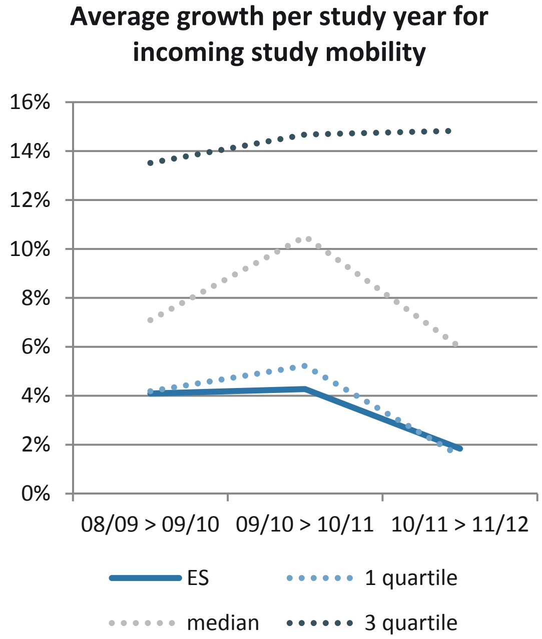
2008/09		2009/10		2010/11		2011/12	
IT	24%	**IT**	23%	**IT**	23%	**IT**	21%
FR	14%	**FR**	14%	**FR**	13%	**FR**	12%
DE	11%	**DE**	10%	**DE**	10%	**DE**	11%
UK	10%	**UK**	10%	**UK**	10%	**UK**	9%
PT	6%	**PT**	6%	**PT**	7%	**PT**	7%

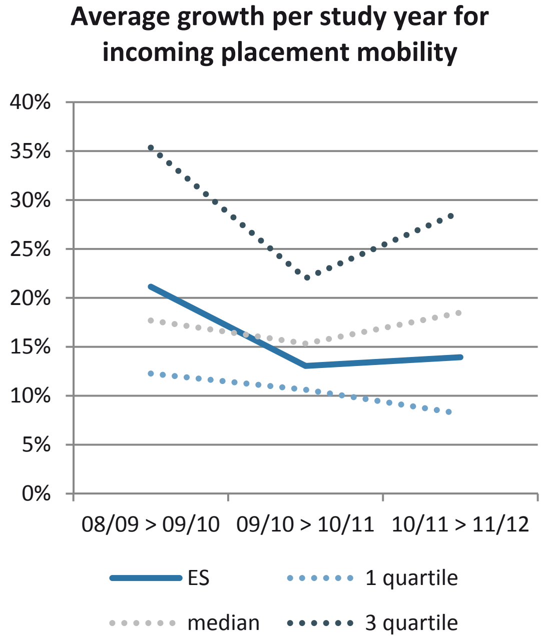
Top 5 host countries for placement mobility

2008/09		2009/10		2010/11		2011/12	
IT	24%	**IT**	22%	**IT**	21%	**IT**	18%
UK	19%	**UK**	18%	**UK**	18%	**UK**	18%
DE	12%	**DE**	13%	**DE**	13%	**DE**	15%
FR	12%	**FR**	12%	**FR**	10%	**FR**	10%
IE	9%	**IE**	6%	**IE**	7%	**IE**	7%

2. Incoming student mobility







Top 5 sending countries for study mobility

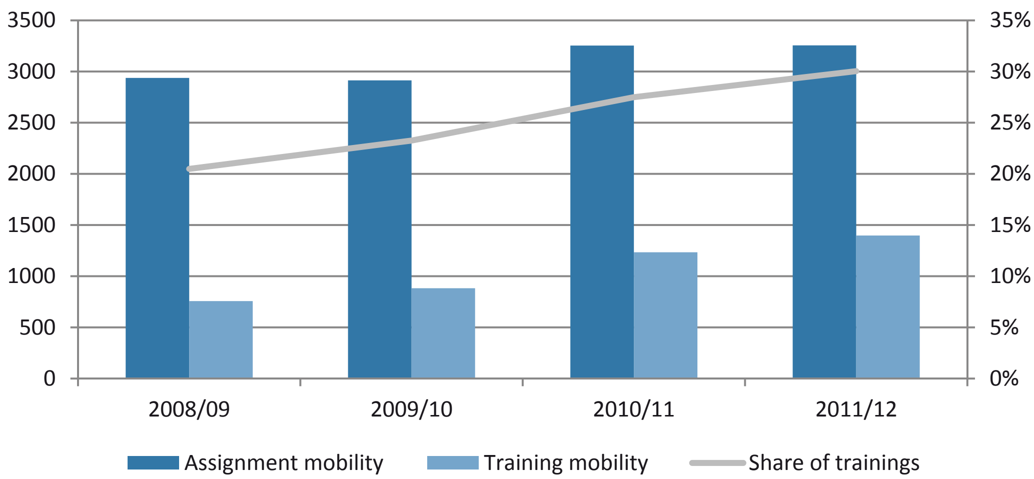
2008/09		2009/10		2010/11		2011/12	
IT	23%	IT	23%	IT	23%	IT	22%
FR	19%	FR	19%	FR	18%	FR	17%
DE	17%	DE	17%	DE	16%	DE	16%
UK	6%	UK	6%	UK	7%	UK	7%
PL	6%	PL	6%	PL	6%	PL	7%

Top 5 sending countries for placement mobility

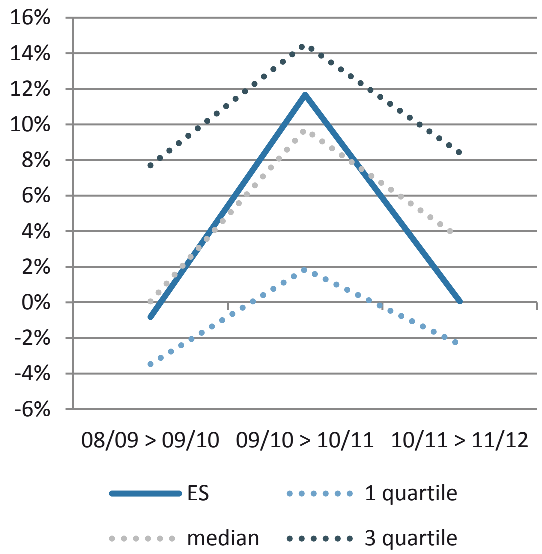
2008/09		2009/10		2010/11		2011/12	
FR	21%	FR	22%	FR	19%	FR	19%
DE	18%	DE	15%	DE	14%	UK	14%
UK	14%	UK	14%	UK	14%	DE	13%
IT	10%	IT	9%	IT	9%	IT	9%
NL	7%	NL	7%	PL	9%	PL	7%

3. Outgoing staff mobility

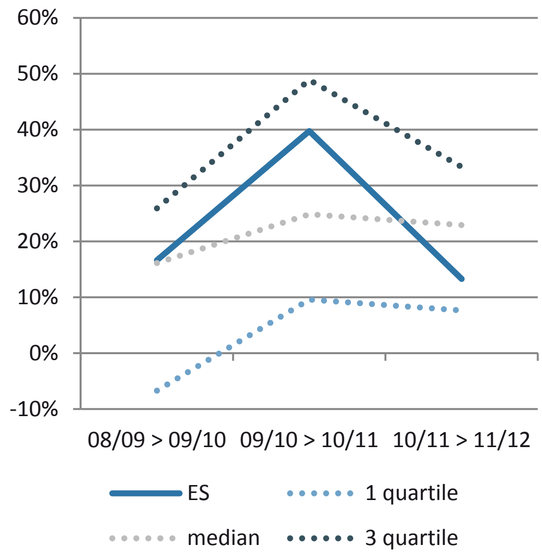
Number of outgoing staff by type of mobility, share of mobile staff going abroad for trainings



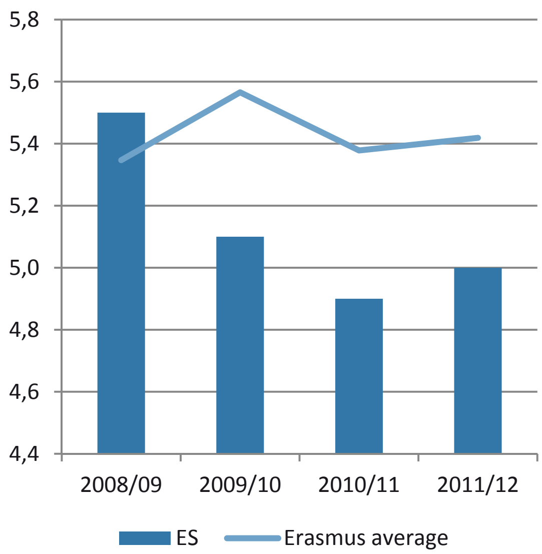
Average growth per study year for outgoing assignment mobility



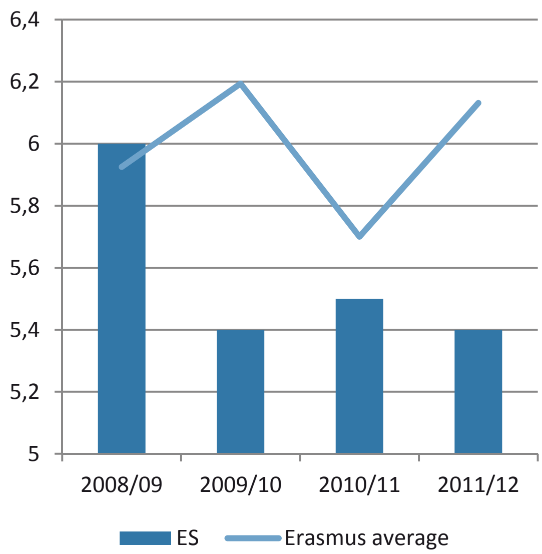
Average growth per study year for outgoing training mobility



Average duration abroad for assignment mobility (in days)



Average duration abroad for training mobility (in days)



Top 5 host countries for assignment mobility

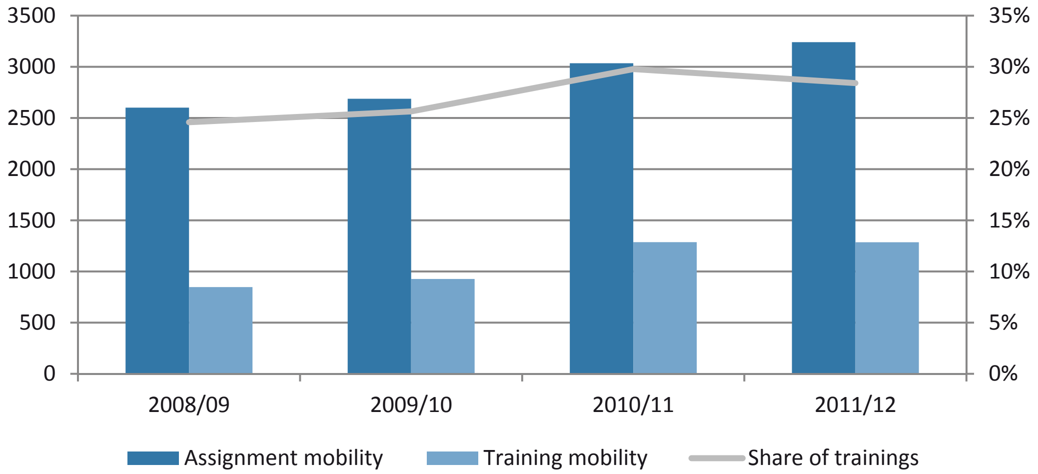
2008/09		2009/10		2010/11		2011/12	
IT	27%	**IT**	24%	**IT**	25%	**IT**	23%
PT	14%	**FR**	14%	**FR**	14%	**PT**	15%
FR	14%	**PT**	13%	**PT**	13%	**FR**	13%
DE	10%	**DE**	10%	**DE**	10%	**DE**	9%
UK	6%	**UK**	6%	**UK**	7%	**UK**	7%

Top 5 host countries for training mobility

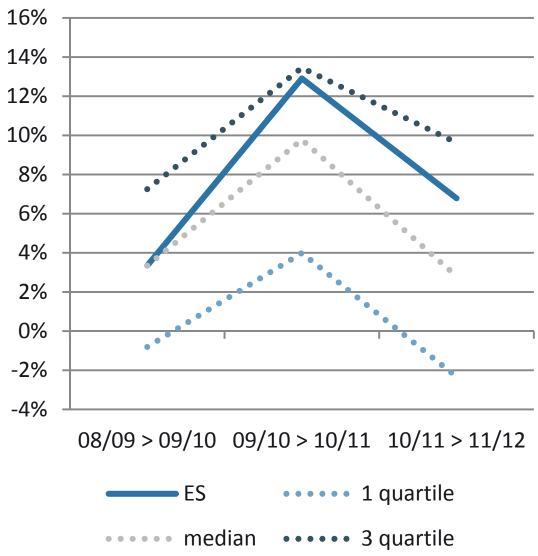
2008/09		2009/10		2010/11		2011/12	
IT	19%	**IT**	22%	**IT**	21%	**IT**	17%
UK	18%	**UK**	11%	**FR**	11%	**DE**	12%
FR	11%	**DE**	10%	**DE**	10%	**UK**	11%
DE	10%	**FR**	10%	**UK**	10%	**PT**	10%
PT	7%	**PT**	9%	**PT**	7%	**FR**	8%

4. Incoming staff mobility

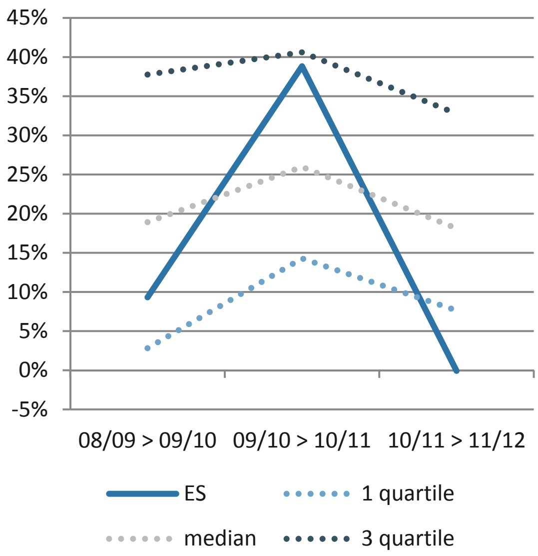
Number of incoming staff by type of mobility, share of staff coming for trainings



Average growth per study year for incoming assignment mobility



Average growth per study year for incoming training mobility



Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
IT	14%	**IT**	15%	**PL**	14%	**PL**	16%
FR	14%	**PL**	13%	**IT**	13%	**IT**	13%
PL	12%	**FR**	12%	**FR**	11%	**DE**	10%
DE	10%	**DE**	11%	**DE**	11%	**FR**	10%
PT	8%	**PT**	7%	**PT**	7%	**PT**	8%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
PL	17%	**PL**	18%	**PL**	19%	**PL**	22%
IT	13%	**IT**	14%	**IT**	10%	**IT**	9%
FI	10%	**FR**	9%	**DE**	9%	**DE**	8%
FR	9%	**FI**	6%	**FR**	7%	**RO**	6%
DE	8%	**RO**	6%	**FI**	6%	**UK**	5%

7. Appendix C: Interviews

In September 2013, named experts from the Erasmus national agencies were interviewed to provide interpretations of the Erasmus data analysis provided by the authors and to add supplementary information on further trends and developments.

The interviews were carried out via Skype or telephone. Before the interviews, each interviewee was sent the Erasmus data analysis by the authors (figures shown in Appendix B for each country) and asked direct questions, which provided the format for a semi-structured interview.

An example of this sheet for the semi-structured interview is provided following the names of each interviewee.

Country	Name	Position	Date of the interview
Cyprus	Roula Kyrillou-Ioannidou	Erasmus and Leonardo Da Vinci Coordinator	19 September 2013
France	Adrien LeLeon and Camille Cholet	Head of Erasmus Programme	17 September 2013
Germany	Siegbert Wuttig	Director of the National Agency	18 September 2013
Greece	Aspasia Karabela	Erasmus/Bologna expert	16 September 2013
Ireland	Gerry O'Sullivan	Head of European Programmes	20 September 2013
Island	María Kristin Gylfadóttir	Special Advisor	17 September 2013
Italy	Luisella Silvestri	Erasmus Unit expert	19 September 2013
Poland	Beata Skibinska	Deputy Director	18 September 2013
Portugal	Ana Rita Ribeiro, Margarida Cardoso and Ana Cristina Soares	Erasmus coordinator	17 September 2013
Spain	Maria del Mar Duque García	Director of the national agency	22 October 2013

Example of the country sheet sent to experts

Mobility in Times of Crisis: Expert comments

The German Academic Exchange Service (DAAD) has commissioned a study on **the effects of European economic and financial crisis on the Erasmus mobility of students and academic staff.** The study includes a quantitative analysis of Erasmus statistics between academic years 2008/09 to 2011/12 in 10 chosen case study countries – Cyprus, Germany, Spain, France, Greece, Ireland, Island, Italy, Poland and Portugal. In order to better understand, interpret and explain the possible statistical changes in different countries, a qualitative analysis is carried out and this is where we would kindly ask for your help and input.

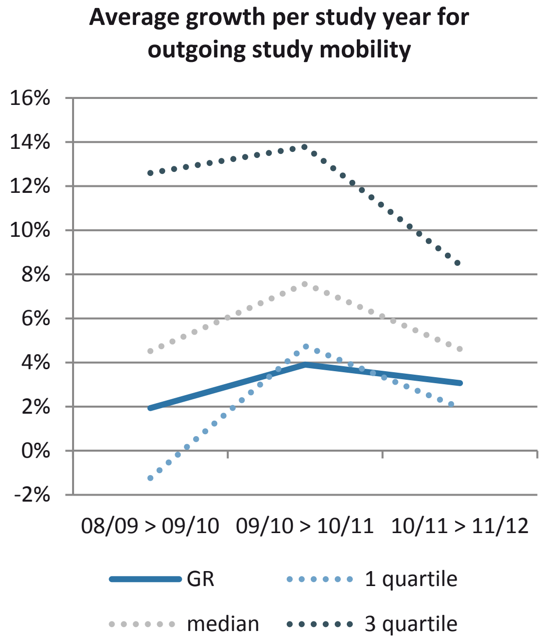
For each of the topic areas, we will point to the trends about your country that we have found through our analysis of the Erasmus data. We would like to explore with you what could account for the changes. To do this, we would like to ask you to use your expertise to answer the following questions.

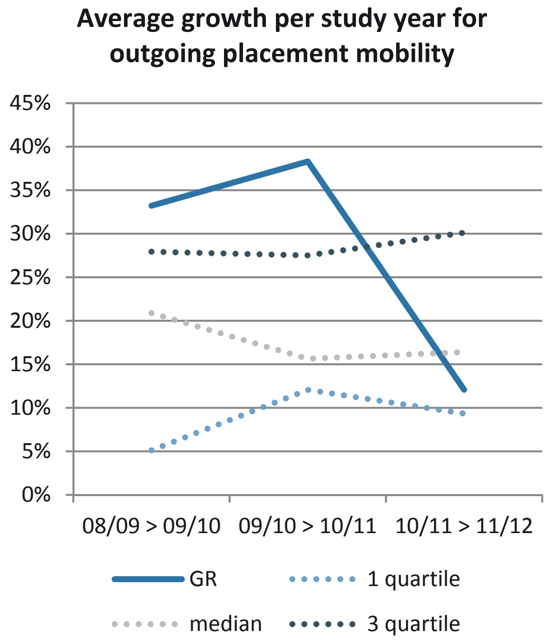
Please also provide comments on your responses, which provide direct insights into developments. We will use these responses as a basis for a discussion with you by Skype or on the telephone (subject to your preferences).

1. Outgoing student mobility

According to our analyses of the Erasmus data, we have found that:

✓ The number of outgoing students has increased steadily from study year 2008/09 in your country, although the average growth per study year has been in general slower for study mobility compared to the average growth in other Erasmus countries. The average growth per study year for placement mobility was the highest in 2010/11 when the number of students going abroad increased 38% compared to the previous study year. This made Greece one of the countries with the highest growth in placement mobility. But in 2011/12 the average growth was only 12%, making Greece more similar to the bottom 25% of Erasmus countries.

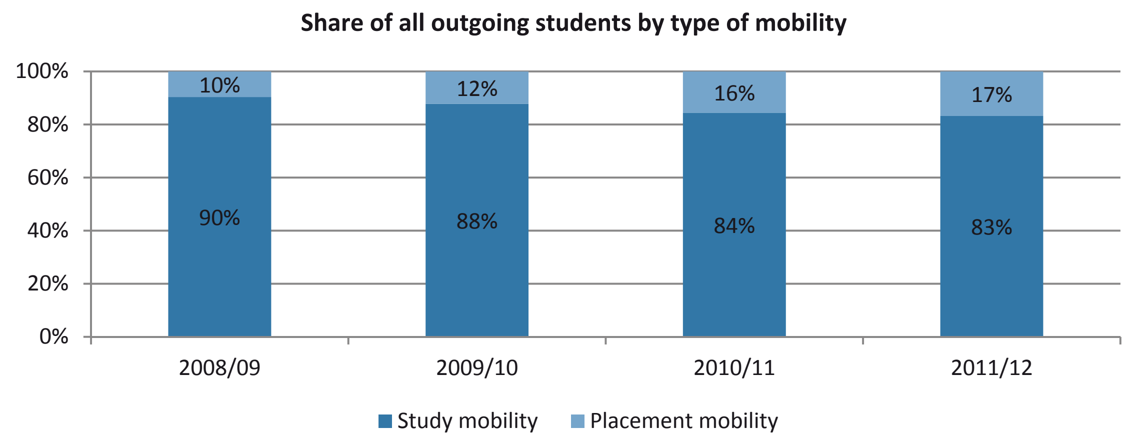




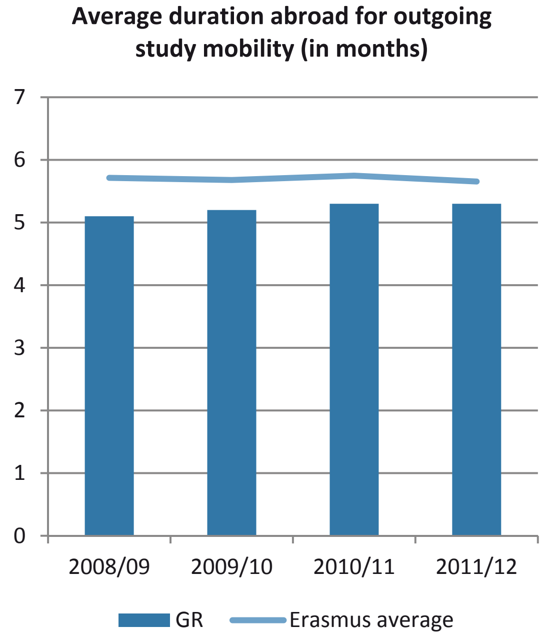
These charts show the average growth in mobility numbers compared to the previous study year in Greece. For example: in study year 2010/11 the number of outgoing students on study mobility was 4% higher than in 2009/10. We are not focussed on the actual mobility rates, because these are different for each of the countries we are looking at. Instead we are looking at the rate of change, under the assumption that the financial crisis and accompanying effects might impact mobility, by decreasing or increasing the number of people going abroad over time.

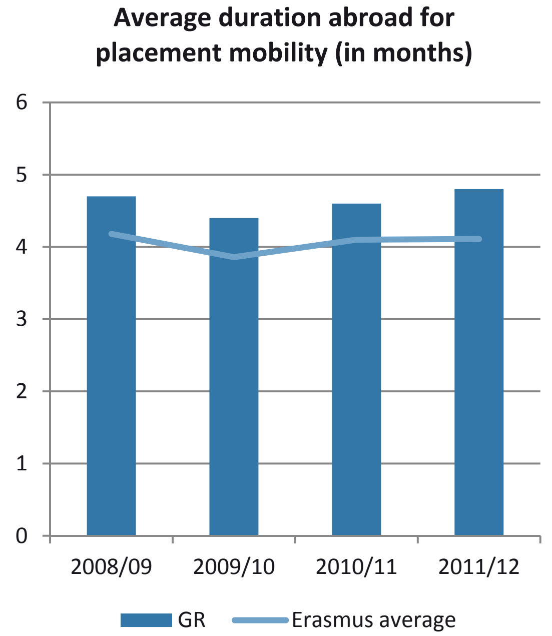
To see how your country is similar / different to other Erasmus countries we have added the average growth per year for the 25% of all Erasmus countries with the lowest growth (1st quartile), the median growth and the average growth per year for the 25% of all the countries that have the highest growth (3rd quartile). For example when in 2010/11 the number of Greece students going on study mobility grew 4% compared to the previous year, it was similar to the average growth in bottom 25% of Erasmus countries (that had the lowest growth). At the same time in top 25% of all the countries the average growth was 14% compared to the previous study year and the median growth was 8%. This indicates that compared to other countries due to some reasons students from Greece were less inclined to study abroad that study year.

✓ The majority of students still undertake studies abroad compared to placements although the share of students in placement mobility has been increasing steadily since 2008/09.



✓ The average duration of studies and placements abroad has been increasing since 2008/09. In comparison to the average duration for outgoing mobility for all Erasmus countries students from Greece spend less time abroad for studies and more time abroad for placements.





✓ The top 5 host countries for studies and placements for students from your country has mainly remained the same since year 2008 although Germany has become a little bit more popular destination for placement mobility for students from Greece.

Top 5 host countries for study mobility

2008/09		2009/10		2010/11		2011/12	
FR	18%	**FR**	16%	**FR**	16%	**FR**	17%
ES	16%	**ES**	16%	**ES**	16%	**ES**	14%
DE	12%	**DE**	13%	**DE**	13%	**DE**	14%
IT	10%	**IT**	8%	**IT**	8%	**IT**	7%
UK	5%	**CZ**	7%	**CZ**	6%	**CZ**	6%

Top 5 host countries for placement mobility

2008/09		2009/10		2010/11		2011/12	
ES	14%	**ES**	18%	**ES**	15%	**DE**	16%
CY	13%	**DE**	15%	**DE**	15%	**ES**	13%
DE	12%	**UK**	12%	**UK**	13%	**UK**	12%
UK	12%	**CY**	11%	**CY**	10%	**CY**	10%
FR	10%	**IT**	8%	**NL**	9%	**IT**	7%

****

Now that you have seen the comparative situation for Greece, we would like you to think about what might have led to the changes seen in the mobility data and especially whether the impacts of the financial crisis might have changed the participation patterns of outgoing students.

1.1 Have there been changes to the accessibility of student grants in your country since 2008 (state grants as well as Erasmus grants)?

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

1.2 Have there been changes to the accessibility of student loans in your country since 2008?

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

1.3 Have there been changes to study costs for students (tuition and other fees) in your country since 2008?

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

1.4 Have there been other changes since 2008 in your country's education policy/economy/society (especially in opportunities for temporary work), which make it difficult for students to fund their studies?

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

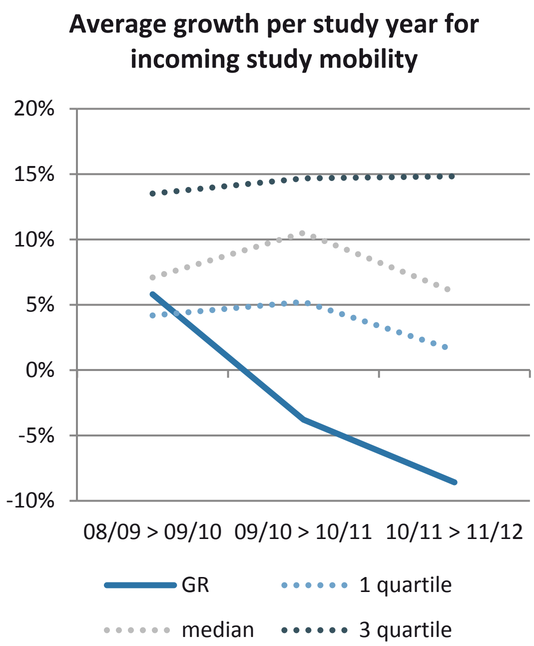
1.5 Aside from these context factors, have there been changes to the mobility aspirations (motivation and obstacles to study abroad) of your country's students since 2008?

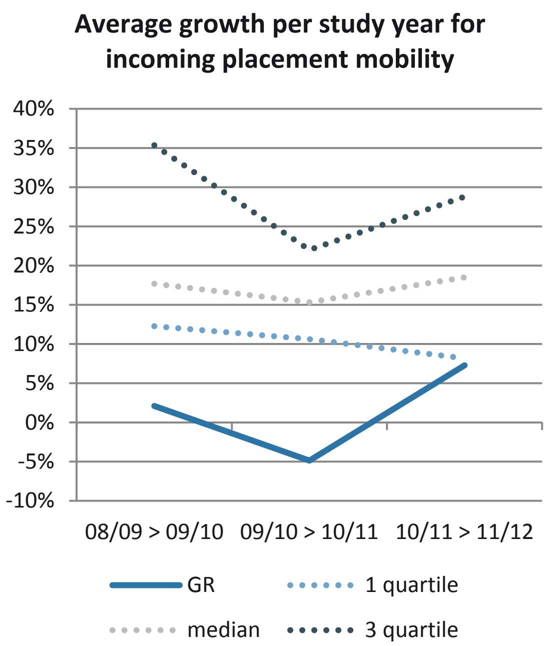
Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

2. Incoming student mobility

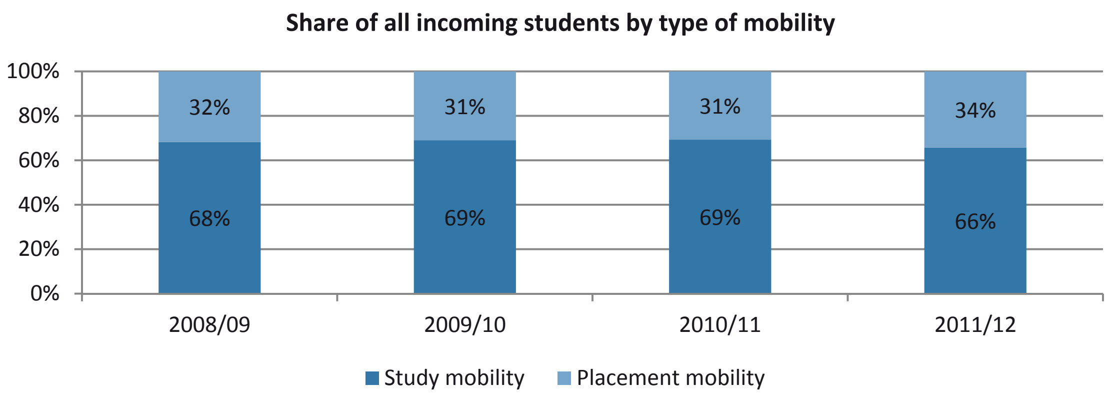
According to our analyses of the Erasmus data, we have found that:

✓ The number of students coming to Greece for study mobility has been decreasing since 2010/11 compared to previous years making the average growth per study year negative and turning Greece into one of the countries with the lowest average growth for incoming study mobility. Incoming placement mobility also saw a decline in 2010/11 but started to grow in 2011/12.





✓ The majority of incoming Erasmus students still choose Greece rather for study mobility than placement mobility and these shares have remained mostly the same since 2008/09.



✓ The top 5 sending countries for studies and internships in your country have remained mainly the same since study year 2008/09, although the share of students from Latvia coming to Greece for placement mobility has seen a noticeable increase in 2011/12.

Top 5 sending countries for study mobility

2008/09		2009/10		2010/11		2011/12	
ES	15%	**ES**	16%	**ES**	17%	**ES**	17%
FR	14%	**FR**	14%	**FR**	14%	**FR**	14%
DE	10%	**PL**	9%	**PL**	9%	**PL**	10%
PL	10%	**DE**	8%	**DE**	8%	**DE**	9%
CZ	7%	**IT**	8%	**IT**	7%	**CZ**	8%

Top 5 sending countries for placement mobility

2008/09		2009/10		2010/11		2011/12	
PL	26%	**PL**	32%	**PL**	21%	**LV**	22%
LV	13%	**LV**	14%	**LV**	14%	**PL**	21%
RO	11%	**RO**	13%	**RO**	13%	**FR**	8%
FI	6%	**FR**	7%	**LT**	7%	**LT**	7%
LT	6%	**FI**	4%	**HU**	6%	**RO**	7%

****

Now that you have seen the comparative situation for Greece, we would like you to think about what might have led to the changes seen in the mobility data and especially whether the impacts of the financial crisis might have changed the participation patterns of incoming students.

2.1 Have there been changes to the opportunities for foreign students to work during their stay in your country since 2008? *Please choose the appropriate characterisation and comment on your response underneath.*

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

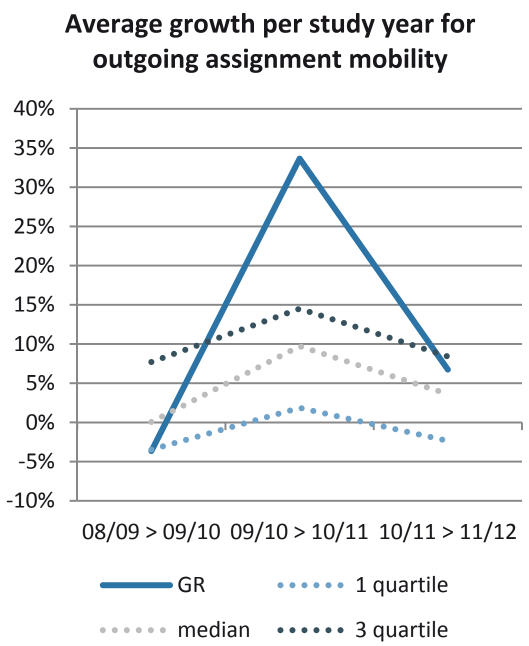
2.2 Have there been other changes which affected the study or living conditions for foreign students in your country since 2008? *Please choose the appropriate characterisation and comment on your response underneath.*

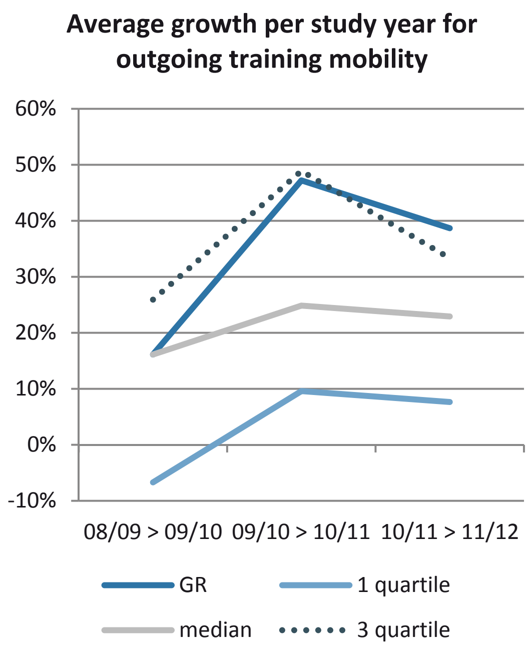
Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

3. Outgoing HEI staff mobility

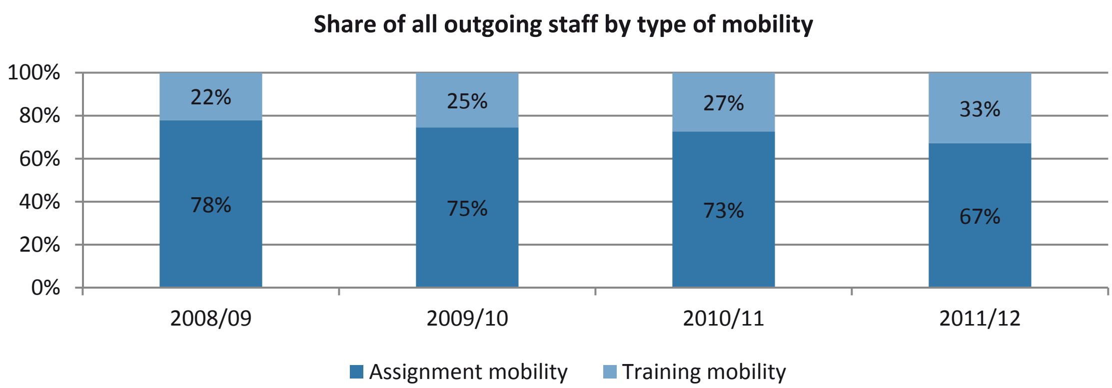
According to our analyses of the Erasmus data, we have found that:

✓ The number of outgoing higher education institutions' (HEI) staff has increased steadily from study year 2008/09 in your country reaching the highest average growth in 2010/11 compared to the previous study year and making Greece one of the Erasmus countries with the highest growth rates.

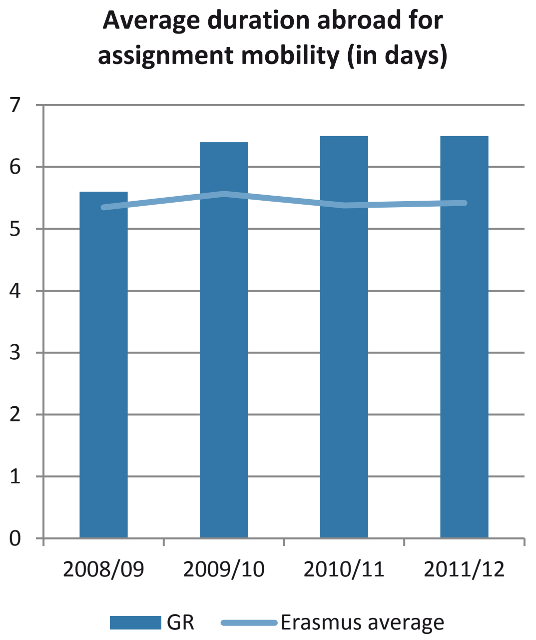


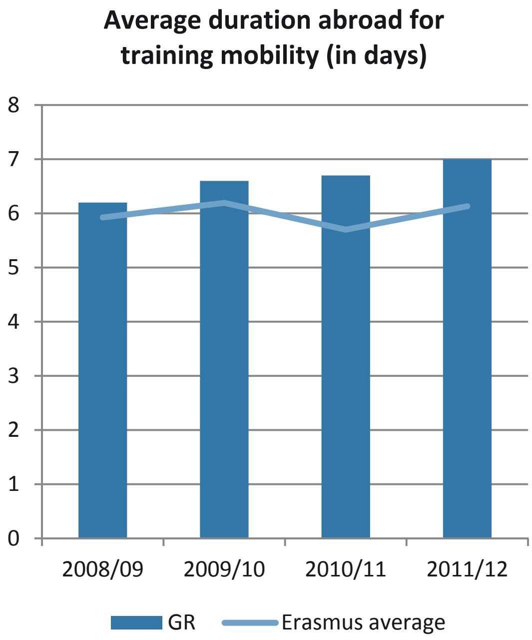


✓ The majority of outgoing staff in Greece still undertake mobility for teaching assignments although the share of staff going abroad for training instead has increased steadily from 2008/09 and in 2011/12 one third of all outgoing staff went abroad for training.



✓ The duration of staff mobility abroad has increased from 2008/09 in your country and compared to the average duration for other Erasmus countries outgoing staff from Greece stays abroad for a longer period of time.





✓ The top 5 host countries for mobile staff from Greece have remained mainly the same since 2008/09.

Top 5 host countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
FR	14%	**DE**	14%	**DE**	13%	**FR**	13%
DE	12%	**FR**	11%	**FR**	12%	**DE**	11%
UK	9%	**IT**	10%	**ES**	9%	**IT**	10%
IT	9%	**ES**	8%	**IT**	8%	**ES**	8%
ES	8%	**TR**	7%	**UK**	8%	**CY**	7%

Top 5 host countries for training mobility

2008/09		2009/10		2010/11		2011/12	
ES	19%	**ES**	13%	**ES**	19%	**ES**	17%
FR	14%	**IT**	10%	**CY**	8%	**DE**	9%
IT	10%	**AT**	10%	**TR**	7%	**IT**	9%
UK	8%	**UK**	10%	**IT**	7%	**CY**	7%
DE	7%	**FR**	8%	**FR**	6%	**PT**	7%

Now that you have seen the comparative situation for Greece, we would like you to think about what might have led to the changes seen in the mobility data and especially whether the impacts of the financial crisis might have changed the participation patterns of outgoing staff.

3.1 Have there been any changes to the working conditions and contracts of HEI staff in your country, which might be related to their outgoing mobility since 2008? *Please choose the appropriate characterisation and comment on your response underneath.*

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

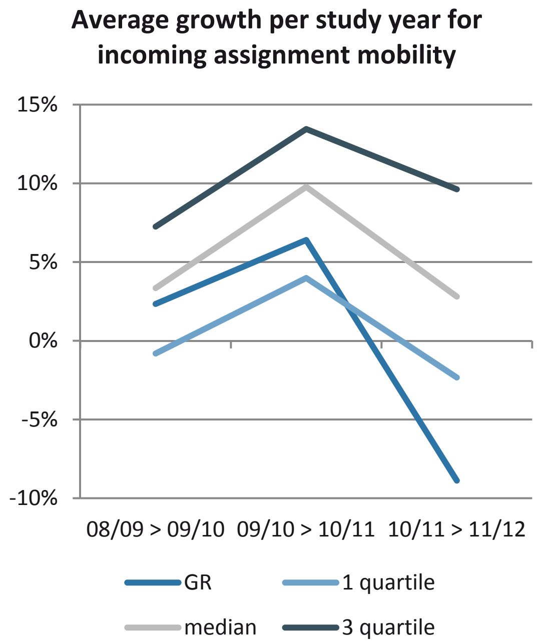
3.2 Have there been changes to the wage levels of HEI staff in your country, which might be related to their outgoing mobility since 2008? *Please choose the appropriate characterisation and comment on your response underneath.*

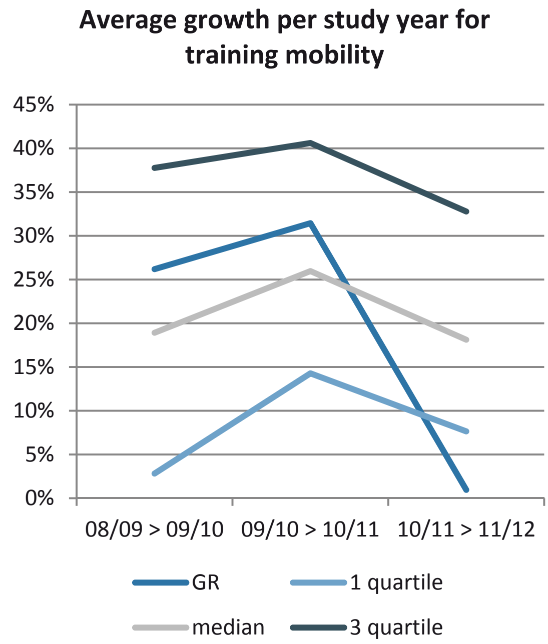
Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

4. Incoming HEI staff mobility

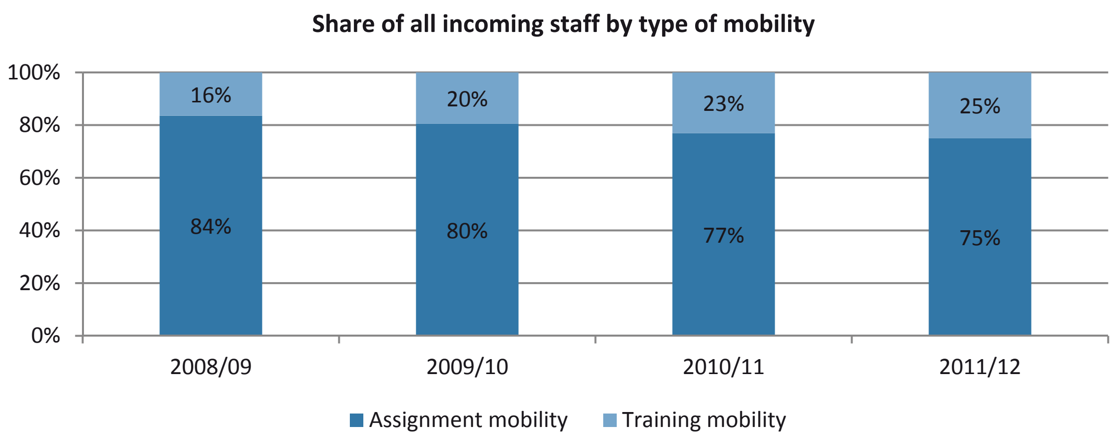
According to our analyses of the Erasmus data, we have found that:

- ✓ The number of incoming HEI staff was increasing until 2010/11 making Greece similar in these trends to the median Erasmus countries. In 2011/12 the average growth per study year started to slow down turning negative for incoming assignment mobility (the number of incoming staff decreased compared to the previous year) and close to zero for placement mobility (the number of incoming staff remained almost the same). In international comparison this has made Greece one of the Erasmus countries with the lowest average growth for incoming staff mobility.





- ✓ The majority of incoming staff still undertakes assignment mobility in Greece, but the share of staff coming for training mobility has increased steadily from 2008/09.



- ✓ The top 5 sending countries for assignment mobility in Greece have remained mainly the same since 2008/09. There have been some changes in the top 5 sending countries for training mobility with an increase in the share of staff from Poland and a decrease in the share of staff from Cyprus.

Top 5 sending countries for assignment mobility

2008/09		2009/10		2010/11		2011/12	
FR	13%	**FR**	13%	**FR**	12%	**FR**	11%
DE	10%	**ES**	10%	**RO**	10%	**DE**	10%
UK	9%	**RO**	9%	**DE**	10%	**PL**	10%
ES	9%	**DE**	8%	**PL**	8%	**RO**	9%
RO	8%	**PL**	8%	**UK**	8%	**UK**	8%

Top 5 sending countries for training mobility

2008/09		2009/10		2010/11		2011/12	
CY	17%	**RO**	14%	**PL**	14%	**PL**	23%
PL	14%	**PL**	12%	**UK**	8%	**RO**	13%
CZ	10%	**ES**	11%	**LV**	8%	**LV**	9%
LV	10%	**FI**	10%	**RO**	8%	**TR**	6%
RO	10%	**CZ**	7%	**CY**	7%	**BG**	6%

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Now that you have seen the comparative situation for Greece, we would like you to think about what might have led to the changes seen in the mobility data and especially whether the impacts of the financial crisis might have changed the participation patterns of incoming staff.

4.1 Have there been any changes in your country, which might be related to incoming staff mobility in your country since 2008? *Please choose the appropriate characterisation and comment on your response underneath.*

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

5. Final remarks

5.1 Have there been any changes in the Erasmus programme itself (budget, participating HEIs, mobility conditions *etc.*) in your country since 2008 that might have had an effect on incoming and outgoing mobility in your country?

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

5.2 The data in this analysis has shown only changes in mobility until study year 2011/2012. In your experience and opinion have there been any changes to the mobility trends in 2012/13 compared to the previous years?

Yes, substantial changes	Yes, moderate changes	No or only minor changes
[comment]	[comment]	[comment]

Thank you very much for these responses! Are there any further points you would like to add on the connection between student and/or staff mobility in the Erasmus programme and the financial crisis?

[comment]

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