

EAIE BAROMETER

INTERNATIONALISATION IN EUROPE

Third edition

BY LAURA E. RUMBLEY & JODY HOEKSTRA-SELTEN



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We achieve this mission through a combination of training, conferences, and knowledge acquisition and sharing. We partner with key stakeholder organisations and institutions to promote our membership's interests and advance international higher education in Europe and the rest of the world.

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**EAIE BAROMETER: INTERNATIONALISATION IN EUROPE
(THIRD EDITION)**

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ACRONYMS

AI - Artificial intelligence

COIL - Collaborative Online International Learning

EAIE - European Association for International Education

EHEA - European Higher Education Area

EU - European Union

FTE - Full-time equivalent

GDPR - General Data Protection Regulation

HEI - Higher education institution

IAU - International Association of Universities

NGO - Non-governmental organisation

UK - United Kingdom

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GEOGRAPHICAL SCOPE¹

DIVISION OF REGIONS²

Based on United Nations definitions

Eastern Europe	Northern Europe	Southern Europe	Western Europe	Western Asia
Belarus	Denmark	Albania	Austria	Armenia
Bulgaria	Estonia	Andorra	Belgium*	Azerbaijan
Czechia	Finland	Bosnia and Herzegovina	France	Cyprus
Hungary	Iceland	Croatia	Germany	Georgia
Moldova	Ireland	Greece	Liechtenstein	Kazakhstan**
Poland	Latvia	Holy See	Luxembourg	Türkiye
Romania	Lithuania	Italy	Netherlands	
Russian Federation	Norway	Malta	Switzerland	
Slovakia	Sweden	Montenegro		
Ukraine	United Kingdom	North Macedonia		
		Portugal		
		San Marino		
		Serbia		
		Slovenia		
		Spain		

**Includes both Belgium-Flemish Community and Belgium-French Community*

*** Per the United Nations, Kazakhstan is part of Central Asia but for the purpose of this study it is included in Western Asia, as it is the only Central Asian country included in the European Higher Education Area.*

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1. Following the list of countries on the Bologna Process/EHEA website as of March 2024: https://www.ehea.info/page-full_members.
 2. Following the list of geographical regions on the United Nations Statistics Division website as of March 2024: <https://unstats.un.org/unsd/methodology/m49/>

EXECUTIVE SUMMARY

The EAIE Barometer (third edition) offers up a remarkably comprehensive set of insights into the state of internationalisation in European higher education today, specifically through the eyes of the professionals directly involved in carrying out this work across the European Higher Education Area (EHEA). In doing so, it provides important indications of the health and vitality of the sector at a moment of significant challenge, opportunity and change. As the third iteration in an ongoing series since 2015, it also offers insight into how perspectives on some issues have evolved over the last decade and presents indications of emerging priorities or concerns.

The full EAIE Barometer (third edition) report provides detailed insight into these issues, through respondents' perceptions in 5 key areas:

1. Their own professional roles in international higher education
2. Their institution's or organisation's structure and strategy for internationalisation, goals and stakeholder influences
3. Budgets for internationalisation
4. The impact of internationalisation
5. How their institutions are performing in relation to specific topics of current interest in the field

WHO RESPONDED TO THE EAIE BAROMETER SURVEY?

The EAIE Barometer (third edition) survey was available for completion from 28 September to 28 November 2023. It was open to anyone working in the European Higher Education Area whose work at the time of survey completion was focused on internationalisation in higher education, as either a main or partial aspect of their work.

The survey generated a total of 2817 individual respondents from 46 EHEA countries – slightly more than both the 2015 and 2018 iterations of the survey. Responses were received from all regions of Europe, with Western Europe the most represented in the data and Western Asia the least. This is consistent with the past Barometer exercises, although in the current iteration there was a noticeable drop in representation from Northern Europe alongside increases in survey participation in all other regions.

The majority (68%) of respondents are individuals for whom internationalisation is a main (rather than a partial) focus of their work. The respondents are based at institutions of various types and sizes, however most (55%) report working at a research university and 77% indicate that their employer is a public institution or organisation. They hold a variety of distinct professional positions across nearly a dozen different functional areas and represent the full range of career tenure, from fewer than two years of experience in the sector to 15 or more years in the field.

Notably, at a time of high interest in matters of diversity and inclusion in internationalisation activities and programmes, fewer than one fifth (17%) identify as belonging to an ‘underrepresented group’³. While there is no previous Barometer data against which to compare this data, it does establish a baseline of information and opens the door on potentially important conversations about the participation of underrepresented populations in a field that overtly values international and intercultural engagement.

Perhaps not surprisingly, a solid majority of respondents report having had a study or a professional experience abroad of more than one to two months. Even still, more than a quarter (26%) have not studied outside their home country and 29% have not worked outside their home country for these indicative periods of time; this points to the idea that international education careers can be accessible to individuals who have not had prior physical mobility experiences of significant duration.

Employment changes are another notable finding in the data. That is, whilst 28% of respondents have worked in the *sector* for five years or less, a much larger group (53%) has only been in their *current role* for five years or less. This means a notable proportion of respondents have made job or role changes in the last several years. It is unclear if this is the result of some particular characteristic of the last several years – including, for example, the tumult brought about by the global COVID-19 pandemic – as comparable data from past EAIE Barometer exercises is not available. However, it does raise interesting questions about the recent flux in employment experienced by many of the current respondents.

The professional or functional areas that the largest percentages of respondents indicate their work is focused on include student and staff mobility, partnerships, and European-funded programmes. The smallest proportion of participants (3%) indicated focusing on social responsibility in their work.

3. This question was specifically worded as, “Do you identify as belonging to an underrepresented group based on language, religion, gender, sexuality, ability, age, or other criteria? No specific criteria for ‘underrepresented’ are provided here; we simply would like to know how you identify.”

HOW DO RESPONDENTS PERCEIVE THEIR ROLES?

Overall, respondents report a high level of satisfaction with the jobs they hold and the sense of purpose their work provides. This is less so amongst those who identify as academic staff, and amongst those with three to five years of experience in the field.

There also seems to be a strong sense of commitment to continue working in the field, as 80% of respondents expect to still be working in international higher education in the next three years, and just 3% feel they will definitely transition out of the field within that timeframe.

Respondents report less positivity with regard to their salary/compensation (40% unsatisfied), work-life balance (one third unsatisfied) and feeling valued by their employer (25% unsatisfied).

Change has been a reality in the daily working lives of respondents over the last several years. In addition to the indications of actual changes in position noted above, 80% of respondents who have been working within the same role over the last three years indicate that this role has changed in some way. Amongst the specific new or different skills required in their work, a notable 40% referenced in some way digital skills, including AI (artificial intelligence).

When asked about the clarity of career development opportunities “from entry level to advanced level” at their institutions or organisations, just one third of EAIE Barometer respondents indicated agreement that a clear career trajectory exists. A larger percentage (40%) indicated that such a career trajectory is not visible to them at their employing institution/organisation, whilst a notable 28% were ambivalent on this question.

WHAT DO RESPONDENTS THINK ABOUT THEIR INSTITUTIONS/ ORGANISATIONS?

The organisation of responsibility for internationalisation in a single central office or with a single centralised team has decreased notably and consistently since the first iteration of the EAIE Barometer in 2015. Just 24% of respondents reported this type of configuration in 2023, as compared to 35% in 2018 and 51% in 2015. Half of all respondents indicated that responsibility for internationalisation is currently structured instead around “coordinated central and decentral teams”.

Respondents provided some conflicting signals around leadership and goal achievement. On the one hand, more than one third of Barometer respondents indicated being (very) unsatisfied with how responsibilities for internationalisation are organised at their

institution/organisation and had limited confidence in their leadership. At the same time, a solid majority (56%) of respondents believed the internationalisation goals set by their institution/organisation were clearly defined and a convincing majority of 79% felt these goals were achievable.

A clear strategy, inspiring and effective institutional leadership, and strong support amongst administrative and academic staff were considered the main drivers to successfully establishing a clearly defined set of goals for internationalisation.

When asked which topics required specifically 'more attention' for institutions to achieve their internationalisation goals over the next three to five years, the three topics most frequently chosen were: strengthening international/intercultural content of the curriculum (65%), virtual internationalisation activities (58%), and student/staff well-being (57%). However, there are strong indications that an overwhelming majority of respondents feel that all of the key topics included in this analysis need 'more' or 'continued' levels of attention.

WHAT DO RESPONDENTS THINK ABOUT THEIR BUDGETS FOR INTERNATIONALISATION?

Concerns about insufficient funding for internationalisation were clearly registered in the findings from the 2015 and 2018 iterations of the EAIE Barometer. To shed more light on this topic, the current Barometer edition sought input on several key questions about the size and stability of budgets dedicated to internationalisation, but this time specifically from individuals with budget responsibilities.

Just under 1500 Barometer respondents indicated having some type of budget or spending responsibilities in the context of their work.

Overall, the data from these individuals produced a relatively positive picture: more than 70% indicated being 'satisfied' or 'very satisfied' with the size of the budget they work with. A similar percentage perceived the source(s) of the budget they are responsible for as either 'very' or 'somewhat stable/predictable'. However, those working with the largest budgets (*ie* €5 million or more) were much more likely (at 26%) to indicate being 'very satisfied' with their budgets than those working with smaller budget amounts, only 10% to 15% of whom selected the 'very satisfied' option for budget size.

When it comes to dissatisfaction with budget sizes by place of employment, respondents working at research universities were more likely (at 26%) to express this position than respondents from other institutional or organisational types.

In terms of perceptions regarding the (in)stability of budgets, some variation across regions was in evidence. Somewhat higher percentages of respondents in Northern Europe (29%) and Eastern and Southern Europe (28%) noted unstable/unpredictable funding sources than in Western Europe (23%) and Western Asia (22%).

When queried as to what respondents would do if presented with a significant increase in budget, the largest percentage (34%) indicated that they would focus on adding additional staff or providing more opportunities for existing staff, including training, higher pay/compensation, and other activities geared towards retention and general “staff happiness”.

HOW DO RESPONDENTS PERCEIVE NATIONAL AND EUROPEAN-LEVEL DYNAMICS?

A majority of respondents see national (58%) and European-level (53%) authorities as either ‘highly influential’ or ‘influential’ when it comes to being drivers of their institution’s goals for internationalisation. However, a look back at past EAIE Barometer data indicates that the influence of both national and European-level actors may be waning. For example, in 2015, 68% of respondents felt that the national policy level exerted a strong or relatively strong influence on their institution’s internationalisation policy, and 66% perceived the same regarding EU-level influence.

Even still, when asked about the effects from national policies, programmes or initiatives on their institution’s actual internationalisation activities (as opposed to influences on institutional policies or goals), a solid 41% of respondents indicated a positive effect.

When it comes to European Union-funded programmes, policies and initiatives, several specific priorities yielded clear indications of beneficial influence. For example, a solid percentage of respondents (43%) characterised the effect of the European Universities Initiative on their institution’s internationalisation activities as positive, with a miniscule proportion (1%) noting negative effects. Separately, 57% of respondents (strongly) agree that “Erasmus+ staff mobility has positively impacted my career.” Importantly, there are very real differences apparent in the data when it comes to the influence of national and European-level policies and programmes, depending on national contexts, professional roles of respondents and other variables.

WHAT DO RESPONDENTS THINK ABOUT ‘IMPACT’?

Without necessarily defining the precise nature of impact for respondents, the EAIE Barometer (third edition) nonetheless sought to gain insight into how professionals working in international higher education across the European Higher Education Area perceive the conversation about impact at their institutions and organisations.

A solid 63% of respondents to the Barometer survey indicated some level of urgency around “the debate or discussion about the impact of internationalisation” at their institution or organisation. At the same time, it is notable that nearly one third of respondents perceived there is no such debate or discussion, or that there is no urgency in relation to it.

Just under half of all respondents (47%) reported feeling ‘significant’ or ‘very significant’ pressure in their roles when it comes to demonstrating the impact of internationalisation.

The most common sources of pressure to demonstrate impact reported by respondents were the leadership from within their own institutions or organisations, followed by national governments or national higher education authorities.

Respondents were asked to select up to three different areas in which they perceive that their institution/organisation is most concerned with delivering impact from its internationalisation activities. Here, it is notable that impact in relation to reputation or rankings was pointed to as a top concern as frequently (47%) as the core higher education interests of student learning outcomes (46%) and research activity (46%).

WHAT DO RESPONDENTS THINK OF CURRENT KEY TOPICS IN INTERNATIONALISATION?

Noting the focus in international higher education circles on a number of key topics in recent years, the Barometer survey also sought to zero in on specific issues of personal or professional interest to respondents. The aspiration here was to gain insight into these key topics from professionals who really care about them, and to understand how they perceive their institution’s/organisation’s engagement with and ‘performance’ with respect to these matters.

From a predetermined list that was generated from several wide-ranging environmental scanning exercises, respondents were asked to select up to two topics of particular interest to them personally or professionally. The topic options included:

- Crisis preparedness/management
- Data knowledge/security
- Digitalisation of administrative tasks
- Environmental sustainability and climate action
- Inclusion and diversity
- Student/staff wellbeing
- Virtual internationalisation activities (COIL, virtual exchange, etc)
- Other

The three topics most frequently selected by respondents were ‘student/staff well-being’, ‘digitalisation of administrative tasks’ and ‘inclusion and diversity’, with only slight variations amongst different respondent groups. Respondents from Northern and Western Europe picked ‘inclusion and diversity’ and ‘environmental sustainability and climate action’ considerably more often as a topic of interest than other EHEA regions.

For each topic selected, respondents were also asked to agree or disagree with a series of statements designed to provide further indications of how they see their institution/organisation engaging with that topic. These statements covered such aspects as clear planning with respect to the key topic, committed leadership with respect to the topic, investment of sufficient financial and non-financial resources to address the topic, and more. Respondents were also asked to indicate if they thought their institution/organisation had “made progress with respect to” the topic over the last 12 months. Some notable findings from this data include the following:

- When looking at whether an institution/organisation has a clear plan for the activities it is pursuing, ‘inclusion and diversity’ came out on top with a large percentage of respondents agreeing with this statement.
- Across all of the key topics, respondents were most commonly inclined to indicate that their institution/organisation was underperforming in relation to providing sufficient financial resources and non-financial resources.
- Overall, respondents interested in ‘Virtual internationalisation’ were most negative about the way their institution/organisation deals with this topic, from planning to leadership to investment of financial resources.
- ‘Data knowledge/security’ scored highest against the question of committed leadership, with 61% of respondents agreeing with this statement. As a whole, the respondents choosing this topic were quite positive about how their institution/organisation is doing.
- When it comes to having made progress in the last 12 months, the results are quite positive. For most of the topics at least half of respondents felt progress was made, and especially in relation to ‘digitalisation of administrative tasks’ and ‘data/knowledge security’. Interestingly, ‘crisis preparedness/management’ scored lowest, with roughly one third agreeing that progress has been made over the last year, but also almost one third disagreeing.

Future Barometer reporting will focus in greater detail on these key topics.

WHAT HAVE WE LEARNED AND WHERE DO WE GO FROM HERE?

Overall, the current EAIE Barometer survey provides clear indications of positivity, change and important work ahead in a variety of areas.

At an individual level, professionals in international higher education across the EHEA appear to be largely satisfied with their work, although as a group they are less satisfied with the salary/compensation they receive than with the personal satisfaction they derive. For many, their roles and responsibilities have been changing over the last several years, with an appetite for training and professional development evident across the board.

At an institutional level, they are also fairly satisfied with the budgets they have responsibility for and are largely confident in the achievability of their institution's or organisation's internationalisation goals. However, there seem to be some concerns about how responsibilities for internationalisation are organised and confidence in leadership is lacking in some quarters. Meanwhile, the perceived influence of national and European-level actors remains significant but may have waned over the last decade.

The sense of urgency professionals feel around demonstrating the impact of internationalisation is widespread but not omnipresent. Interestingly, professionals in the field perceive that their institutions are as focused on demonstrating the impact of internationalisation via reputation and rankings performance as demonstrating student learning outcomes or achieving certain levels of research activity.

Institutions are, overall, perceived to be making progress over the last 12 months in regard to a range of topics currently of high interest to respondents and the wider field, but additional attention to key activities and priority issues is still required. Indeed, the data highlights the ongoing need for the sector to attend simultaneously to a multitude of activities and considerations. It also raises important questions about the extent to which, and in what ways, different stakeholders and national and European-level initiatives exert influence on internationalisation across the EHEA.

As seen through the lens of the current EAIE Barometer survey exercise, the community of international higher education professionals in Europe presents as essentially optimistic in spirit, measured in its sense of recent progress in key areas and hungry for opportunities to improve practice and deliver results. Understanding their interests and aspirations, while harnessing their energy and expertise, is vital, given their frontline role in supporting the many and varied internationalisation agendas in European higher education today.

INTRODUCTION

The departure of the UK from the European Union. The COVID-19 pandemic. The increasing presence of artificial intelligence in our everyday lives. The accommodation crisis. The Russian invasion of Ukraine. Much has happened in Europe, and the world as a whole, since the publication of the EAIE Barometer (second edition) in 2018, let alone the first iteration in 2015. Indeed, although originally planned for 2021, the third instance of this large and important research project was delayed by the unprecedented uncertainty and turmoil of the pandemic period. Now in 2024, in the face of rapid and constant change, it is as important as ever to continue mapping the landscape of internationalisation in the European Higher Education Area (EHEA) from the perspective of professionals working directly on this process at higher education institutions (HEIs) and other stakeholder organisations across Europe. Such is the aim of this third edition of the EAIE Barometer, which serves as the latest instance in a large-scale, ongoing research project that aspires to enhance understanding of the realities of internationalisation in higher education across the EHEA.

Through periodic survey and analysis exercises, the EAIE seeks to inform and empower the international higher education community in Europe – including institutional leaders, policymakers and other stakeholders – when it comes to understanding the state of internationalisation today, its evolving profile over time, and possible future directions and developments.

BUILDING ON PREVIOUS BAROMETER EXERCISES

The EAIE Barometer research project was initially launched in 2014. It employed an innovative-for-its-time survey exercise that was designed to provide new and useful insights into the current practices employed by higher education institutions with respect to internationalisation, as well as the enabling factors and the challenges inherent in this work. The results of that exercise were published in 2015 as *The EAIE Barometer: Internationalisation in Europe*. This report focused on the state of internationalisation in Europe, key developments and challenges in the field, as well as the specific skills and needs of staff involved in internationalisation. It provided valuable insights into changes in the field, actual practices employed by European institutions and tools required for the further professionalisation of internationalisation. A spin-off report was also published, titled *International Strategic Partnerships* (Sandström & Weimer, 2016), which spoke to a clear

current interest in the issue of partnerships at that time. This publication looked into the state of strategic partnerships in Europe at that moment and was aimed at international officers seeking to improve their knowledge of the topic.

Following another large-scale survey exercise in 2017, the second edition of the Barometer was published in 2018 and built upon the results of the first edition in order to detail changes and growth within the field and highlight trends. It led to two spin-off reports. The EAIE Barometer: Signposts of Success (Sandström & Hudson, 2016) delved into nine commonalities shared by institutions where practitioners were most confident about internationalisation's current and future state, and EAIE Barometer: Money Matters (Sandström & Rumbley, 2016), which focused on the ways in which funding and financial considerations can act as an enabler as well as an obstacle to internationalisation in Europe.

Building on the knowledge gained from these two previous EAIE Barometer surveys, this current and third edition addresses themes covered in these previous exercises as well as several new and contemporary issues in internationalisation, in order to reflect on and better understand the field as it looks today. From its beginnings, the EAIE Barometer project has examined internationalisation from the point of view of the actors directly involved in international higher education. For this third edition, the main aim was to collect important data about how these professionals operating on the frontlines of internationalisation are personally experiencing the various challenges and opportunities currently framing the field. This viewpoint can provide important indicators of what is working well and how policy and practice can evolve in constructive ways. Key questions this survey aimed to explore include: What is really going on at ground level in these rapidly changing times? How do professionals in the field feel about their roles, their institutions or the policy environments that affect their work? What levels of confidence do they feel when it comes to the achievability of their institution's/organisation's internationalisation goals or the ability of leadership to lead? What specific topics deserve extra attention in the years to come and to what extent do they perceive that progress has recently been made in key areas?

CONTENTS OF THE EAIE BAROMETER (THIRD EDITION) REPORT

The current EAIE Barometer report is divided into seven sections. Within each section, the analysis focuses on the aggregate EHEA results and compares results by region, country, and other key variables, as appropriate. Where possible, comparisons to similar data captured from previous Barometer reports is also presented, to provide indications of continuity or change over time. The report sections are as follows:

- **Respondents**

This section provides an overview of all respondents that filled in the 2023 Barometer survey, including information on the country/regional breakdown of responses, years of experience working in the sector/current role, general focus of work and type of institution/organisation.

- **How do respondents feel about their roles?**

This section focuses on respondents' perceptions of their specific role at their employing institution or organisation. Data covers topics such as satisfaction with their overall job, work/life balance and salary/compensation; expectations of continuing to work at their institution/organisation specifically, or in the sector generally, in three years' time; how their role has changed over the past three years; and the need for professional development.

- **How do respondents feel about their institutions/organisations?**

This section provides insights into how respondents feel about their employing institution/organisation. How responsibility for internationalisation is organised at HEIs and how satisfied respondents are with that approach; confidence in leadership for internationalisation; the achievability of internationalisation goals; which stakeholder groups drive internationalisation; and which topics require more, less or continued attention in the next few years.

- **Perceptions about budgets**

This section attempts to shed some light on perceptions about the size and stability of budgets dedicated to internationalisation efforts. The data analysed was collected solely from individuals who indicate they have budget responsibilities of some type and the analysis addresses such issues as the size of the budgets respondents are responsible for, how satisfied they are with the size of this budget, and satisfaction levels with the stability of the budget size and funding sources.

- **National and European-level dynamics**

In this section, the main focus is on the influence of national and European-level authorities and developments. Questions covered in this section include: How influential are these players? What effect do national policy(ies)/programmes/initiatives have on institutions' activities? How do respondents characterise their individual and/or institutional experience with various aspects of the Erasmus+ programme? And how have institutions engaged with or been affected by other priorities and opportunities emanating from the European Commission?

- **Perceptions about impact**

This section sheds light on how respondents perceive the nature of the conversation about the impact of internationalisation at their institution/organisation. What kinds of impact are most valued? Which stakeholders are most invested in questions of impact and what is the general level of urgency about demonstrating impact?

- **Topics of Interest**

Last but not least, this section provides more information about how professionals in international higher education relate to current topics of interest to the field. Respondents were asked to pick up to two topics that are particularly interesting/important to them, either professionally or personally, and answer several questions about how they think their institution/organisation is performing in relation to those topics. Topics included, amongst others, climate change and environmental sustainability, inclusion and diversity, student/staff well-being and digitalisation of administrative tasks.

The study concludes with reflections on the implications of the EAIE Barometer (third edition) findings for the higher education sector in Europe, now and looking toward the future.

METHODOLOGY

OVERVIEW

The EAIE Barometer is the largest, most geographically representative study of its kind focused on internationalisation in higher education in Europe. The research explores the current state of affairs with respect to internationalisation in European higher education as viewed by professionals directly involved in this work. The EAIE Barometer forms an ongoing series of studies (with previous data collection exercises completed in 2015 and 2018), providing insights into developments in internationalisation over time.

For the current edition, the EAIE retained McKinley Advisors (McKinley), a market-leading consulting firm focused exclusively on serving the association sector, to support study design and data collection.

POPULATION AND SAMPLE

The population for this study included professionals working at higher education institutions and relevant stakeholder groups within the European Higher Education Area (EHEA). The sample included all current and prospective EAIE members and the networks of a broad range of national agencies and partner organisations across the EHEA. The survey was also promoted via various EAIE communication channels.

SURVEY INSTRUMENT

The primary data collection instrument was a structured questionnaire comprising closed-ended and Likert-scale questions to quantify responses and gather detailed insights. The instrument also included open-ended questions to provide additional nuance to the data. The questions were divided into seven sections. These addressed aspects such as respondents' perceptions of their role and institution, budgets for internationalisation and the impact of internationalisation. One section was specifically devoted to current topics of interest to the field, to uncover challenges, emerging trends and the future outlook for the sector.

The instrument was developed by EAIE staff, with input from an international advisory group with expertise in both internationalisation and data collection, as well as McKinley research experts. Additionally, the instrument development process drew inspiration from previous EAIE survey activities and a comprehensive review of other major recent surveys on internationalisation in higher education. Before launching the survey, a pilot test was

conducted with a small group representing the target population. The pilot test aimed to identify any ambiguities in the questionnaire and assess the clarity of questions, and the survey instrument was revised accordingly after the pilot testing period.

DATA COLLECTION

The survey was launched on 28 September 2023 and closed on 28 November 2023 after fielding for 61 days. Respondents received an invitation email and six reminder emails from the EAIE. Multiple channels were utilised to maximise responses and ensure a diverse sample. The survey received 2817 total responses, including 2001 complete and 816 partial responses.

In appreciation for participation, every 500 respondents who completed the survey were entered in a drawing to win one of three prizes: one conference fee waiver for the 2024 EAIE Annual Conference and Exhibition in Toulouse, one free EAIE annual membership for 2024, or one registration fee waiver for the 2024 EAIE training offer of their choice. From amongst all of the completed surveys, one grand prize was also awarded, consisting of a conference fee waiver for the 2024 EAIE Annual Conference and Exhibition in Toulouse, plus an invitation to the EAIE President's Reception in Toulouse.

DATA ANALYSIS

Quantitative data collected through the survey was analysed overall and in terms of various key variables, including institution/organisation type, role, institution size, country and other important segments. The analysis included partial responses as they contribute valuable insights and prevent potential biases. This practice ensures a more inclusive representation of participant perspectives. It also acknowledges the diversity in respondent engagement levels, *ie* their willingness or ability to complete a rather extensive online survey. Taken together, these approaches enhance the overall reliability of the study's findings.

Open-ended responses from the survey were thematically analysed to identify recurring patterns, themes, and qualitative insights. This qualitative analysis provides a deeper understanding of the nuances of respondents' experiences and perspectives with respect to the various topics and issues addressed in the survey questions.

ETHICAL CONSIDERATIONS

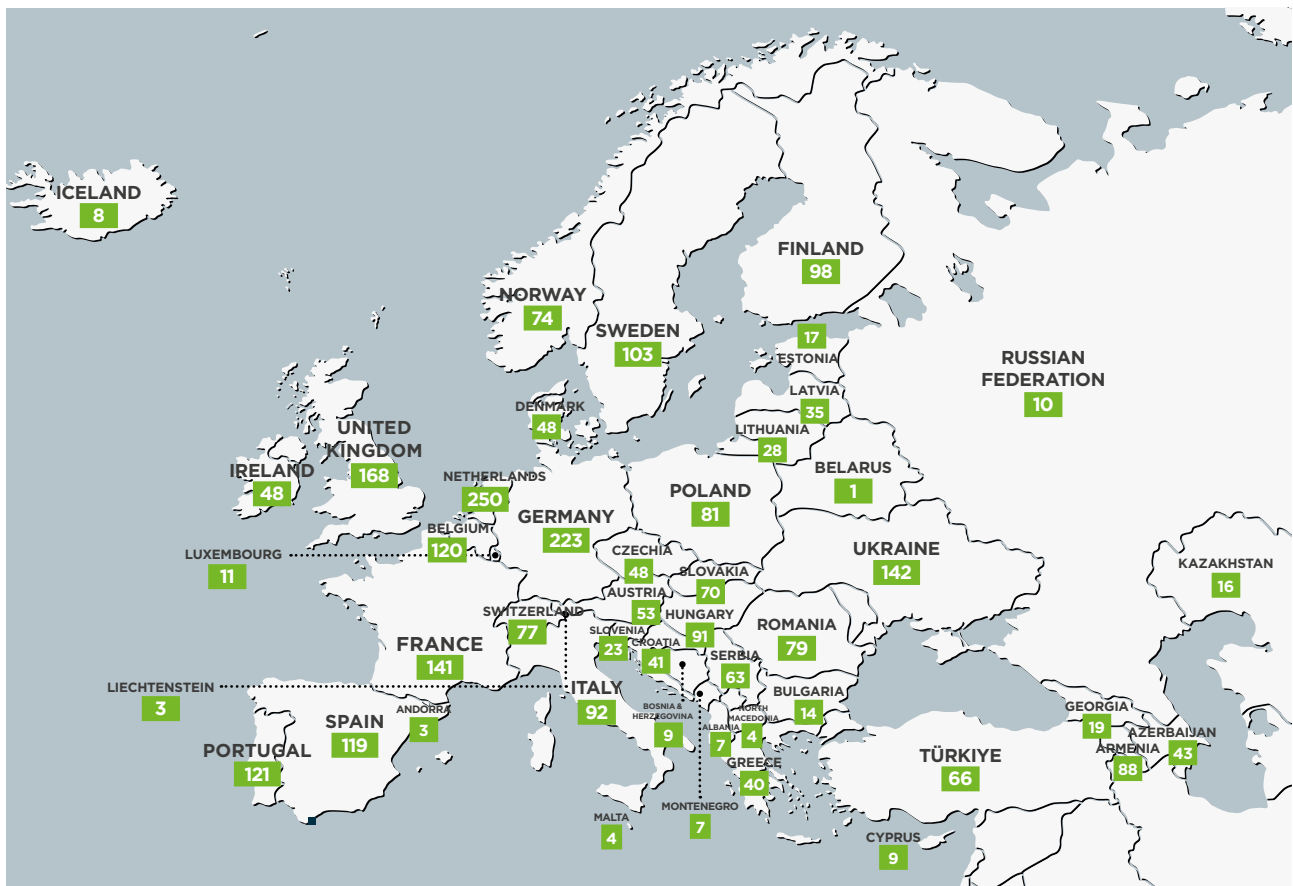
This survey adhered to ethical guidelines outlined by the European Union's General Data Protection Regulation (GDPR), ensuring the confidentiality and anonymity of respondents. Informed consent was obtained from participants, and their data was used solely for research purposes.

RESPONDENTS

The 2023 Barometer survey exercise generated a total of 2817 individual respondents from 46 EHEA countries. This shows a slight increase in comparison to the two previous Barometer surveys: 2411 respondents participated in the 2015 survey (representing 32 EHEA countries), whilst 2317 individual responses were collected for the 2018 edition (representing 44 EHEA countries). In this most recent survey, the highest number of respondents came from the Netherlands (9%, 250 respondents), Germany (8%, 223 respondents), the United Kingdom (6%, 168 respondents), Ukraine (5%, 142 respondents), and France (5%, 141 respondents). This was followed by roughly 4% of respondents each from Belgium, Portugal, Spain and Sweden. Other countries represented in the survey each made up 3% or less of the respondents (**Figure 1**). There were only three countries that are part of the EHEA from which no responses were received: Holy See, Moldova and San Marino.

Figure 1

Geographical distribution of respondents (n=2817)



Meanwhile, in comparison to the previous Barometer report, large increases in responses were seen in the cases of Serbia (from 0 to 63), Armenia (from 2 to 88), Azerbaijan (from 8 to 43), Ukraine (from 35 to 142), and Portugal (49 to 121). There are also notable decreases in responses as compared to the EAIE Barometer (second edition, 2018), including from Estonia, Finland, Georgia, Kazakhstan, Lithuania and the Russian Federation.

When looking at the distribution of respondents across the various regions within the EHEA (see **Figure 2**), the most represented region is Western Europe and the least represented is Western Asia, although in absolute numbers the participation of respondents from Western Asia has doubled since the first Barometer report in 2015. The representation amongst the other three regions is quite even. There has been a noticeable drop in representation from Northern Europe since the first iteration of the EAIE Barometer (2015), both in terms of numbers of respondents and as a percentage of total respondents. Conversely, there has been a notable increase in respondent numbers from Western Europe in 2024 as compared to previous Barometer surveys, along with some increases in Eastern and Southern Europe, as well.

Figure 2

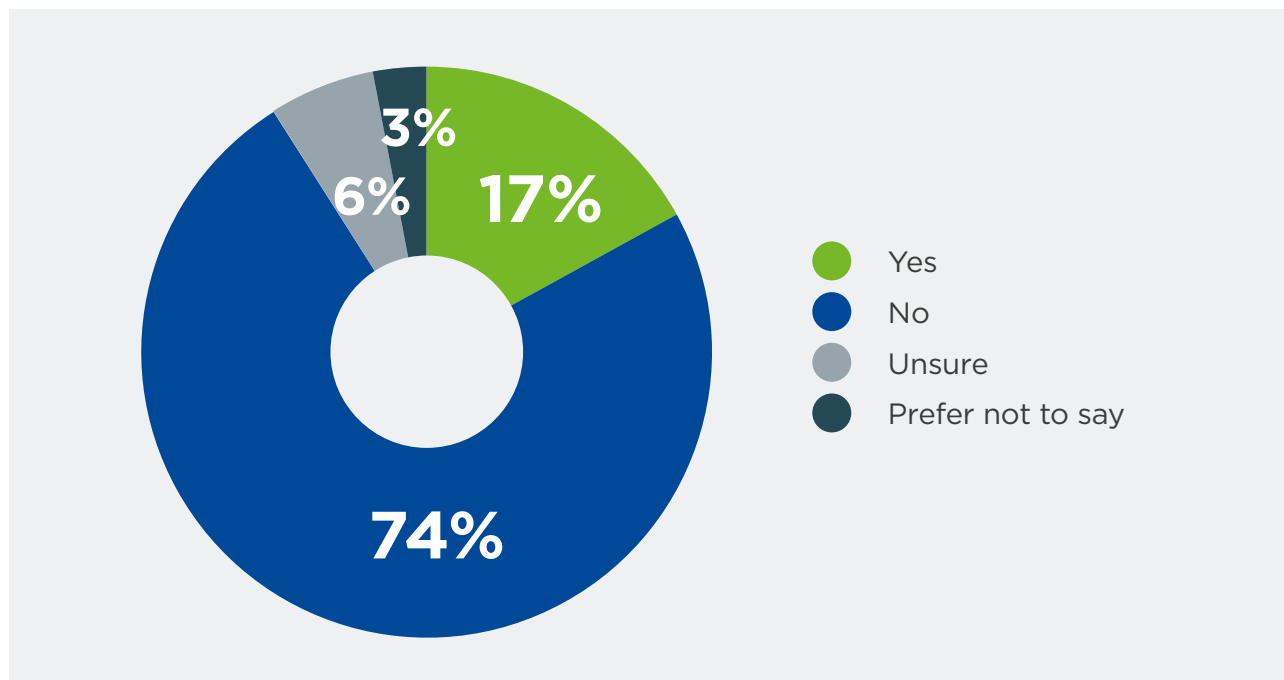
Regional distribution of respondents per Barometer edition

Region	EAIE Barometer 2015	EAIE Barometer 2018	EAIE Barometer 2024	Change in respondent numbers (2015 vs. 2024)
Eastern Europe	419 (17%)	411 (18%)	536 (19%)	117
Northern Europe	764 (32%)	673 (29%)	627 (22%)	-137
Southern Europe	447 (19%)	339 (15%)	533 (19%)	86
Western Europe	658 (27%)	669 (29%)	878 (31%)	220
Western Asia	123 (5%)	225 (9%)	241 (9%)	118

In addition to country information, respondents were also asked whether they identify as belonging to an “underrepresented group”.⁴ Of the roughly 2000 respondents who answered this question, close to three quarters (74%) did not consider themselves part of an underrepresented group, whilst 17% did (see **Figure 3**). Interestingly, in countries such as Austria, the Netherlands and the UK, where respondents indicated that ‘inclusion and diversity’ is a topic that is of interest or needs more attention (as explored in Section 6), a higher percentage of respondents considered themselves as belonging to an underrepresented group.

Figure 3

Do you identify as belonging to an underrepresented group based on language, religion, gender, sexuality, ability, age, or other criteria? (n=2025)



Without significant additional information, of course, the picture of ‘representation’ or ‘underrepresentation’ amongst international higher education professionals across Europe cannot be effectively illustrated. However, it does perhaps begin to hint at a reality that has also surfaced in the context of research focused on senior international education officers in the United States, where a 2017 survey found that “the profession lacks racial diversity, with 69% of the respondents marking white” (AIEA, p. 5).

4. Do you identify as belonging to an underrepresented group based on language, religion, gender, sexuality, ability, age, or other criteria? No specific criteria for ‘underrepresented’ are provided here; we simply would like to know how you identify.

INDIVIDUAL CHARACTERISTICS

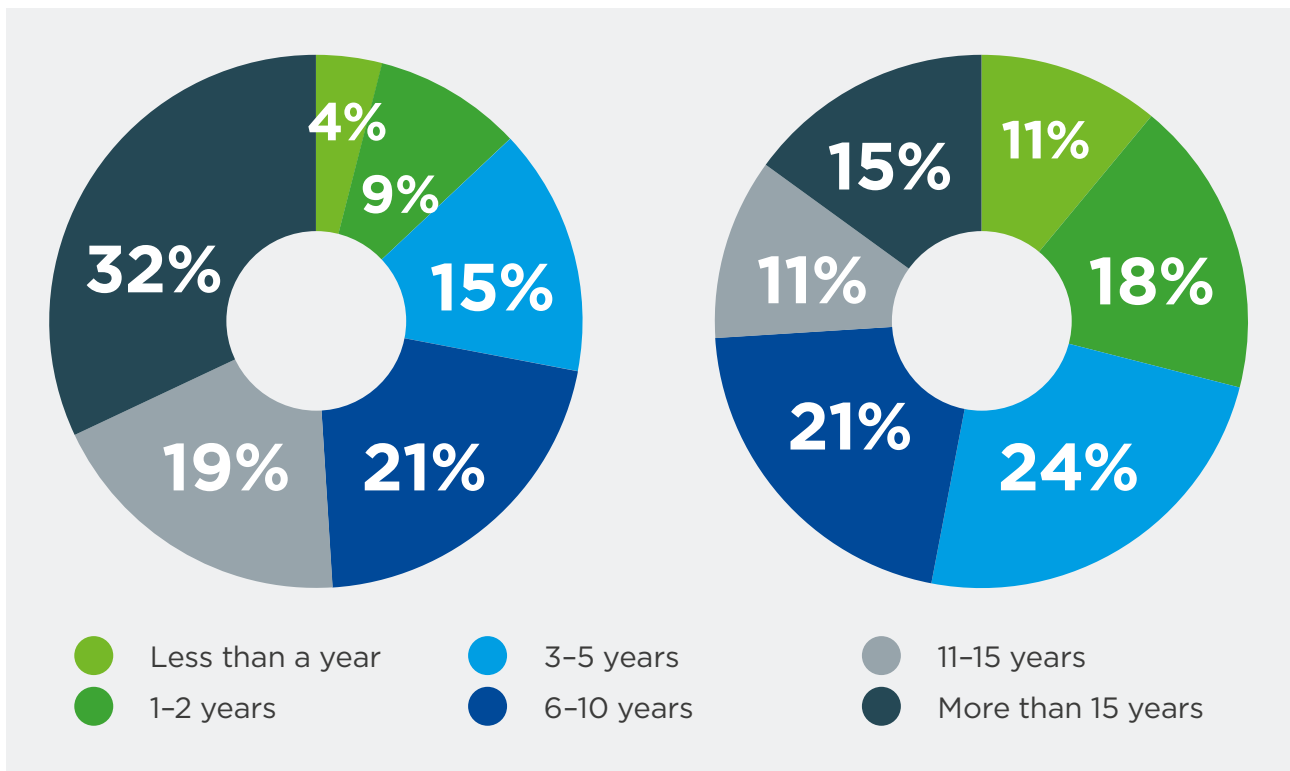
Close to 75% of all respondents have been working in the international higher education sector for over five years, with one third of respondents (32%) having over 15 years of experience in the sector (see **Figure 4**). When looking at how many years of experience respondents have within their current roles, the results were divided quite equally, with 53% of respondents being in their current role for five years or less, and 47% for more than five years (see **Figure 5**).

Figure 4

How many years of experience do you have working in international higher education? (n=2684)

Figure 5

How many years of experience do you have in your current role in international higher education? (n=2682)



Interestingly, whilst 28% of respondents have worked in the sector for five years or less, a notably larger group (53%) reported that they have only been in their current role for five years or less. This means that, while a strong majority of respondents (72%) are seasoned professionals with more than five years' experience in international higher education, a much slimmer majority (47%) have enjoyed more than five years' experience in their current role within the sector. This indicates that a significant proportion of respondents have made job or role changes in the last several years, including during the rather tumultuous period of the COVID-19 pandemic. As described in Section 1 of this report, some of this transition may account for the strong percentages of individuals who report the need for some level of training in their current position.

For the majority of respondents, internationalisation is the main focus of their everyday work (68%), whilst 32% indicate it as a partial focus of their job. In terms of position types, almost half (48%) define themselves as ‘Professional staff – Specialist or Coordinator’ (35%) or ‘Professional staff – Director or Manager’ (13%). One quarter of respondents work as the ‘Head of international office or equivalent’, and 13% consider themselves a ‘Faculty member/academic staff’. Other answer options included, amongst others, ‘Policy advisor’ (4%), ‘Deputy head or Vice Rector at HEI’ (3%), and ‘Head or Rector at HEI’ (1%) (see **Figure 6**).

Figure 6

Which of the following best describes your position? (n=2633)

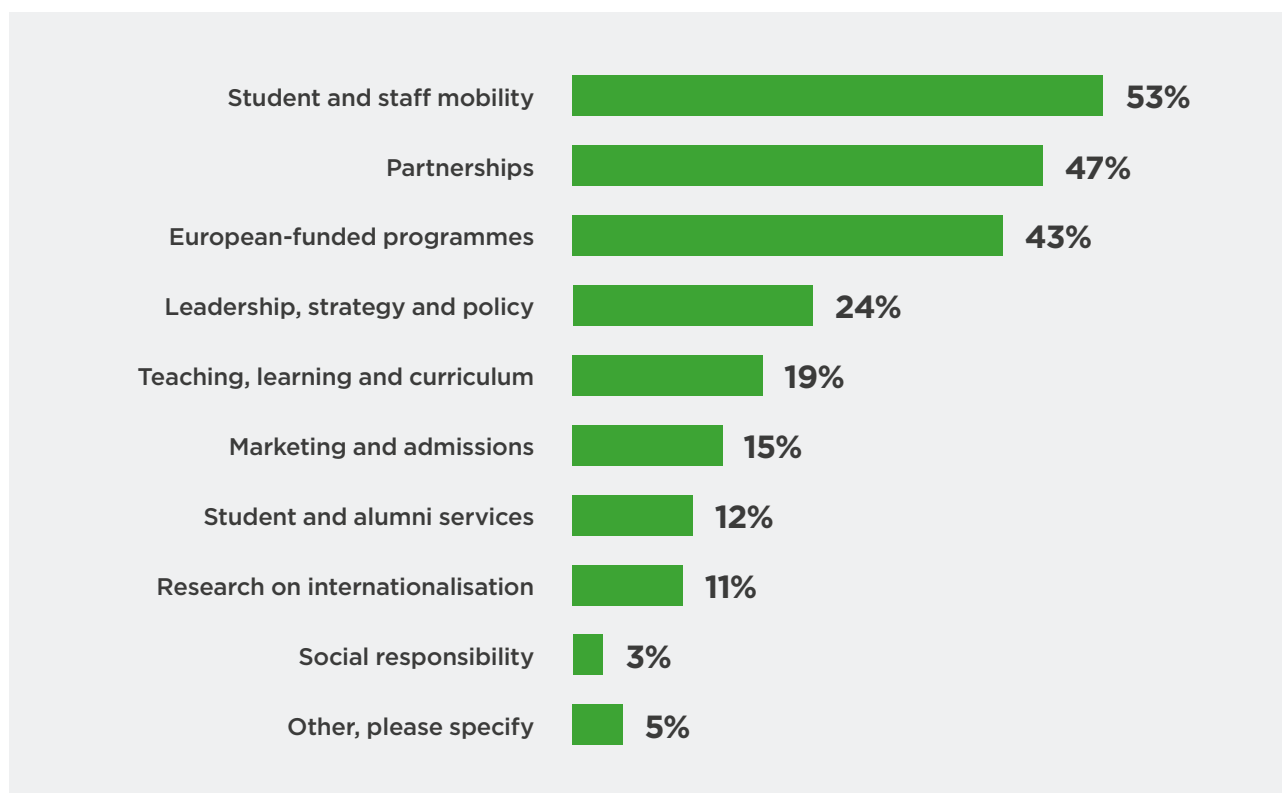


Respondents were also asked to pick up to three categories that best describe the general focus of their work, based on the EAIE Taxonomy⁵.

5. For more information on the EAIE Taxonomy, see <https://www.eaie.org/resource/eaie-taxonomy.html>.

Figure 7

Which of the following categories best describes the general focus of your work? (select up to three) (n=2608)



As seen in **Figure 7**, the most chosen categories were ‘Student and staff mobility’ (53%), ‘Partnerships’ (47%), and ‘European-funded programmes’ (43%). A striking regional difference worth mentioning is that in Eastern Europe (53%), Southern Europe (49%), and Western Asia (59%) more respondents specifically linked their work to European-funded programmes than in Northern (32%) and Western Europe (37%).

INSTITUTIONAL CHARACTERISTICS

A convincing majority of respondents work at a public institution (77%), with the remaining 23% working at either a private non-profit, private for-profit or other type of organisation (see **Figure 8**). That same majority of respondents, 77%, work at a higher education institution, either a research university (55%) or university of applied sciences (22%) (see **Figure 9**). These percentages are almost exactly the same as for the previous Barometer report from 2018.

Figure 8

Which best describes the institution/organisation where you work? (n=2608)

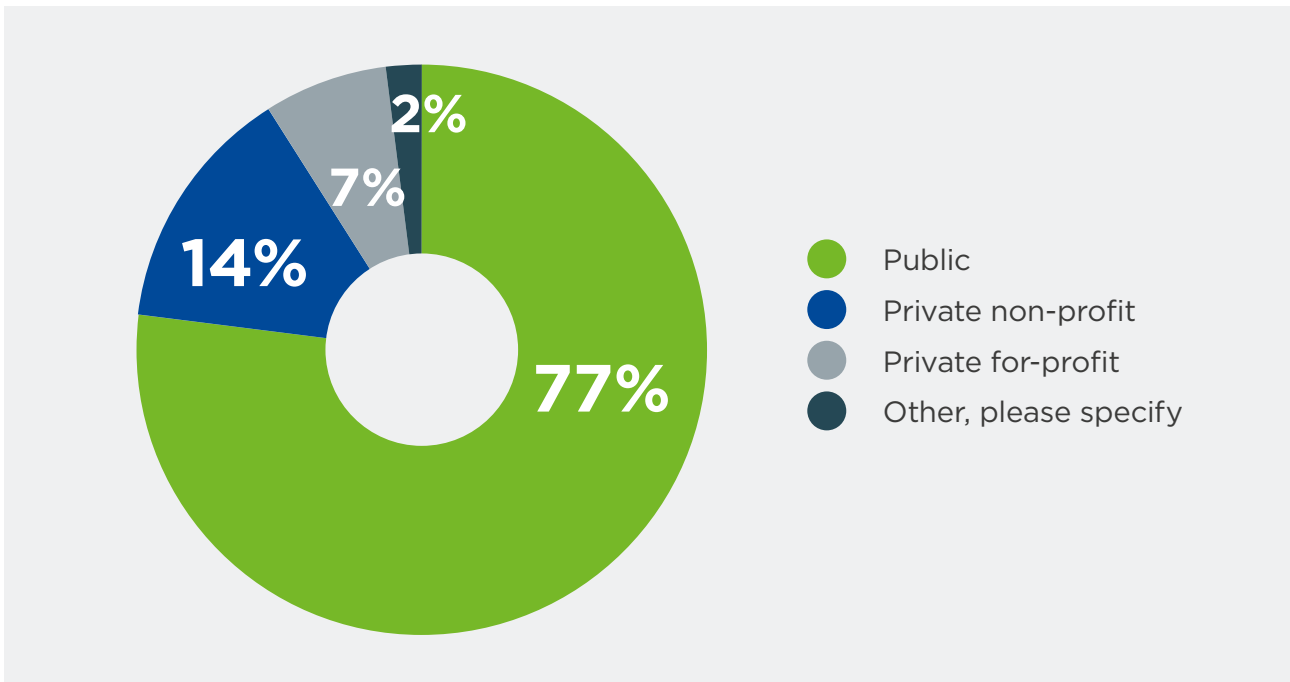
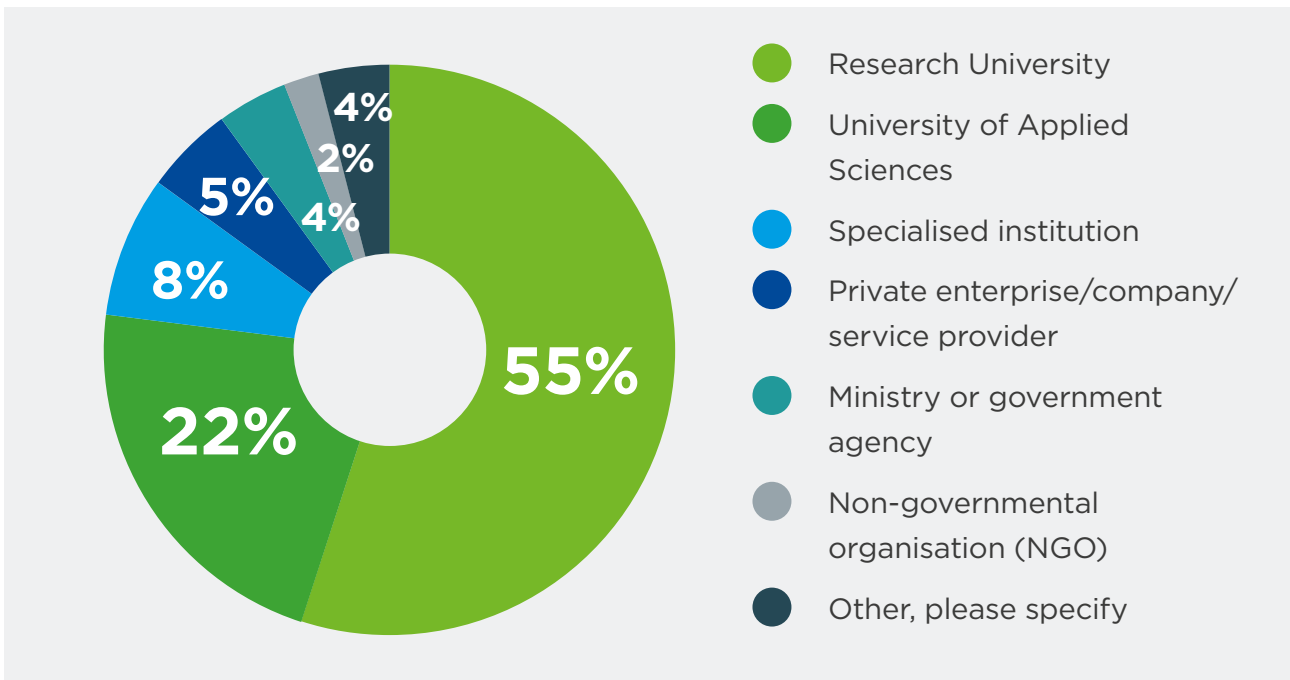


Figure 9

How would you categorise the institution/organisation where you work? (n=2565)



Especially in Western Europe, the difference between the number of research university respondents (42%) and university of applied sciences respondents (36%) is quite small, in contrast to the other regions where research universities were by far the most frequently represented type of institution/organisation.

When looking at the size of the institutions respondents work for, the distribution is quite equal across institutional types: 29% work at relatively small HEIs (fewer than 5001 full-time equivalent [FTE] students), 33% at medium-sized HEIs (5001-20,000 FTE students), and 32% at large HEIs (more than 20,000 FTE students). This breakdown roughly matches the EAIE Barometer (second edition) numbers.

INTERNATIONAL CHARACTER OF RESPONDENTS

To begin to form an understanding of the international character or experiences of the Barometer respondents themselves, two questions were included in the survey focusing on the number of international educational and/or professional experiences respondents have had. As shown in **Figures 10 and 11**, a large majority of 74% has had at least one international educational experience of two months or more. Similarly, 71% of respondents indicated they have had at least one international professional experience of one month or more. This signals that international education professionals largely 'practice what they preach' in terms of engaging in international experiences in the context of their own education and career activities. Meanwhile, it also shows that mobility experiences are not required in order to work in this field.

Figure 10

In how many different countries (excluding your home country) have you had educational experience(s) of 2 months or more? (n=2047)

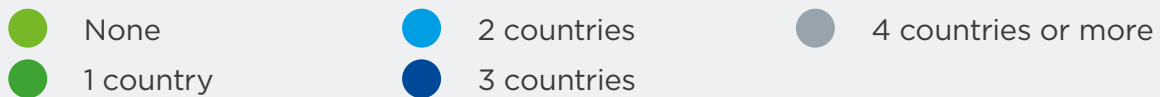
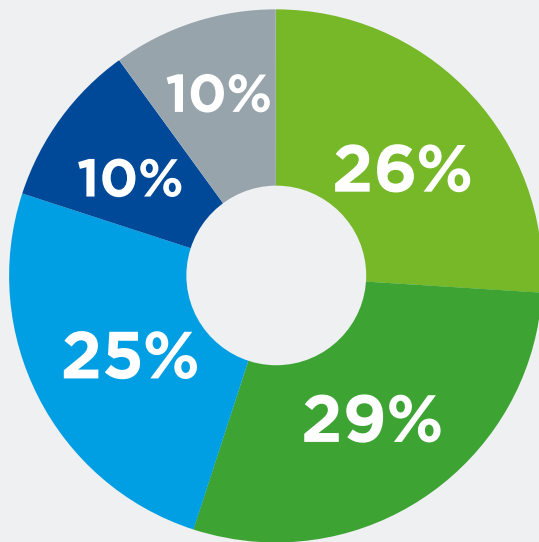
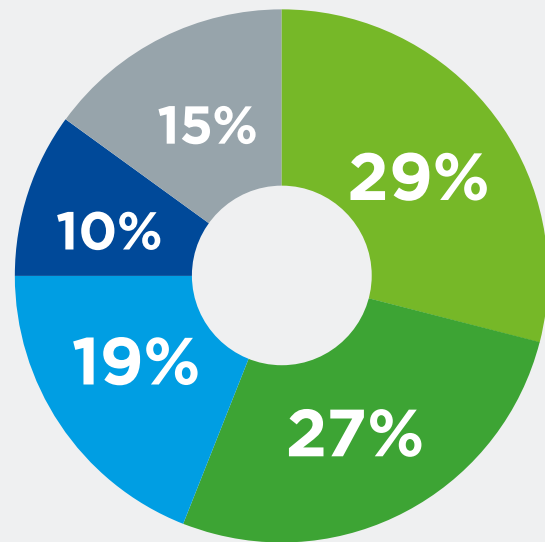


Figure 11

In how many different countries (excluding your home country) have you had professional experience(s) of 1 month or more? (n=2047)



Zooming in to individual countries, the largest percentages of respondents per country with at least one international education experience are Switzerland (94%) and Germany (91%). For the international professional experiences, the highest scoring countries are France (89%) and Austria (86%). Countries where most or sizable proportions of respondents have had no international *educational* experiences include Serbia (50%), Portugal (47%) and Slovakia (44%). Meanwhile, the top countries with a large part of respondents without international *professional* experiences are Slovenia (60%), once again Portugal (51%), and Romania (44%).

SECTION 1

HOW DO RESPONDENTS FEEL ABOUT THEIR ROLES?

SECTION HIGHLIGHTS

- Overall, respondents report a high level of satisfaction, with their jobs and the sense of purpose they feel. This is less so amongst academic staff members, and amongst those with three to five years of experience.
- The image is also less rosy when we look closer at the satisfaction linked to salary/compensation (40% unsatisfied), work-life balance (30% unsatisfied) and feeling valued by one's employer (25% unsatisfied).
- Nearly 80% of respondents expected to still be working in international higher education in the next three years, whilst just 3% felt they will definitely leave the field within that timeframe.
- 81% of respondents who have worked in the same role over the past three years, indicated that that role has changed in some way. Looking at the specific new or different skills required, a notable 40% referenced in some way digital skills, including AI (artificial intelligence).
- There is a robust interest in training, regardless of years of experience, with nearly 85% of respondents perceiving a 'significant' or 'moderate' need for training or professional development.
- When looking at satisfaction related to training opportunities, close to two thirds of respondents were satisfied, but a solid 36% indicated being unsatisfied.

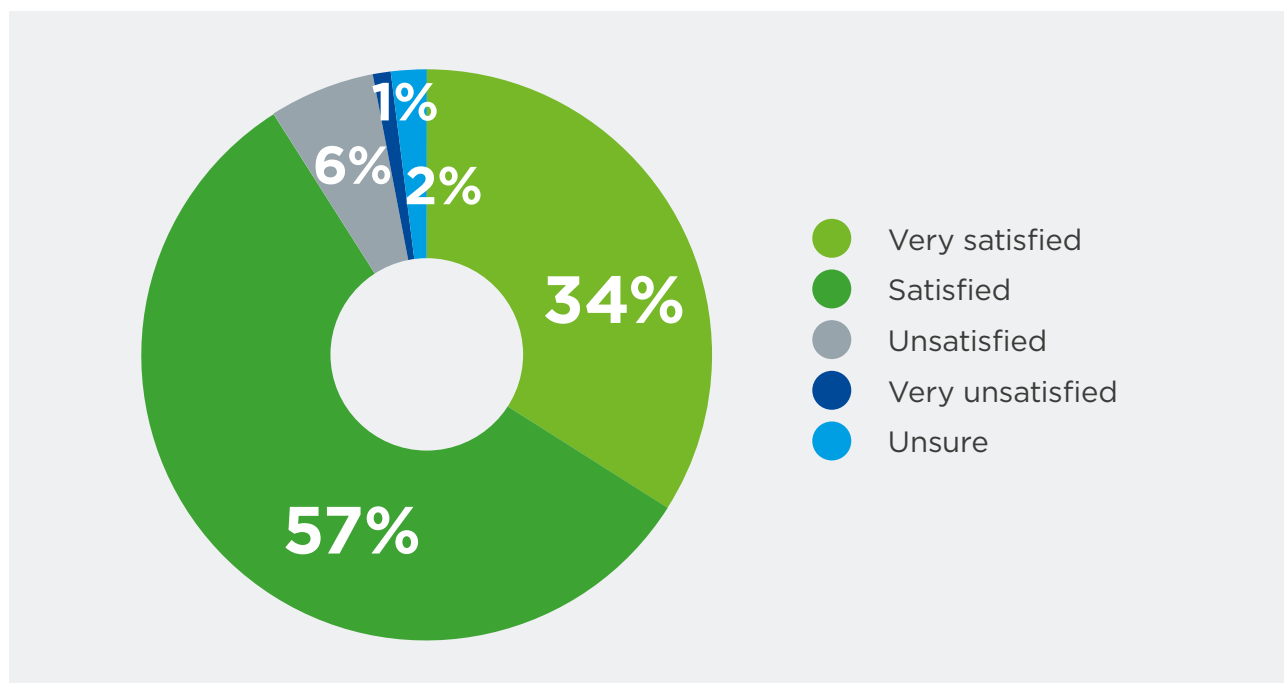
An argument can be made that the strength of any given sector relies heavily on the extent to which the individuals working within that sector are energised by the work they do, feel committed to their jobs and feel supported in their roles by the institutions and organisations that employ them. The EAIE Barometer findings provide important insights into these questions amongst professionals working in the field of international higher education across Europe today.

SATISFACTION WITH JOB, SENSE OF PURPOSE AND COMPENSATION

Overall, as seen in **Figure 12**, there appears to be a high level of job satisfaction: 91% of respondents reported being either 'very satisfied' or 'satisfied' in their current positions, and nearly as many (89%) indicated the same levels of satisfaction with the 'sense of purpose' their job/role/position provides.

Figure 12

Overall job/role/position (n=2423)



The types of roles held by respondents correlate with different levels of reported overall satisfaction. Here, holding a position of authority of some type seems to matter, with those indicating that they have higher levels of responsibility also reporting satisfaction with their positions more frequently.

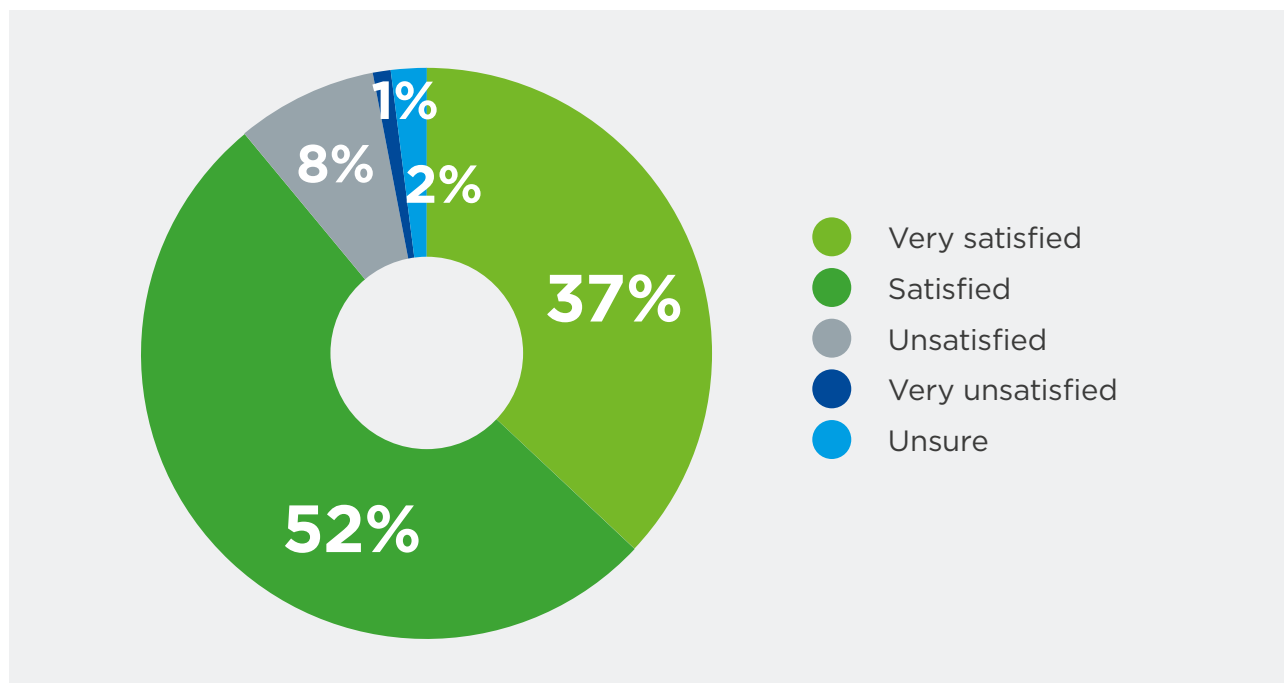
For example, 55% of individuals working as heads of international offices and 42% in 'other leadership' roles reported being 'very satisfied' in their positions, notably above the EHEA average of 34% 'very satisfied'. And whilst just 1% of total respondents reported being 'very unsatisfied' with their roles, a much larger 10% of those identifying as academic staff indicated being 'very unsatisfied' with their jobs. Along these same lines, those reporting that the main focus of their work falls in the category of 'leadership, strategy and policy' were most likely (at 40%) to indicate high satisfaction with their jobs overall, whilst those who say their work is mostly focused on 'research on internationalisation' were the least likely (at 12%) to report being 'very satisfied' with their work.

Due to the wide difference in numbers of respondents per country, comparing percentages across countries can be misleading. However, amongst those countries with at least 40 responses to the survey, the country with the largest percentage of respondents reporting that they were either 'unsatisfied' or 'very unsatisfied' (18%) was Ireland.

A positive sense of purpose was widely reported across the responses (see **Figure 13**). As with overall job/role/position satisfaction, respondents identifying as focused in their work on 'leadership, strategy and policy' most frequently indicated being (very) satisfied, and those identifying as academic staff were – at 11% – slightly more inclined than the overall average to indicate being (very) unsatisfied with the sense of purpose that comes with their work.

Figure 13

Sense of purpose (n=2423)

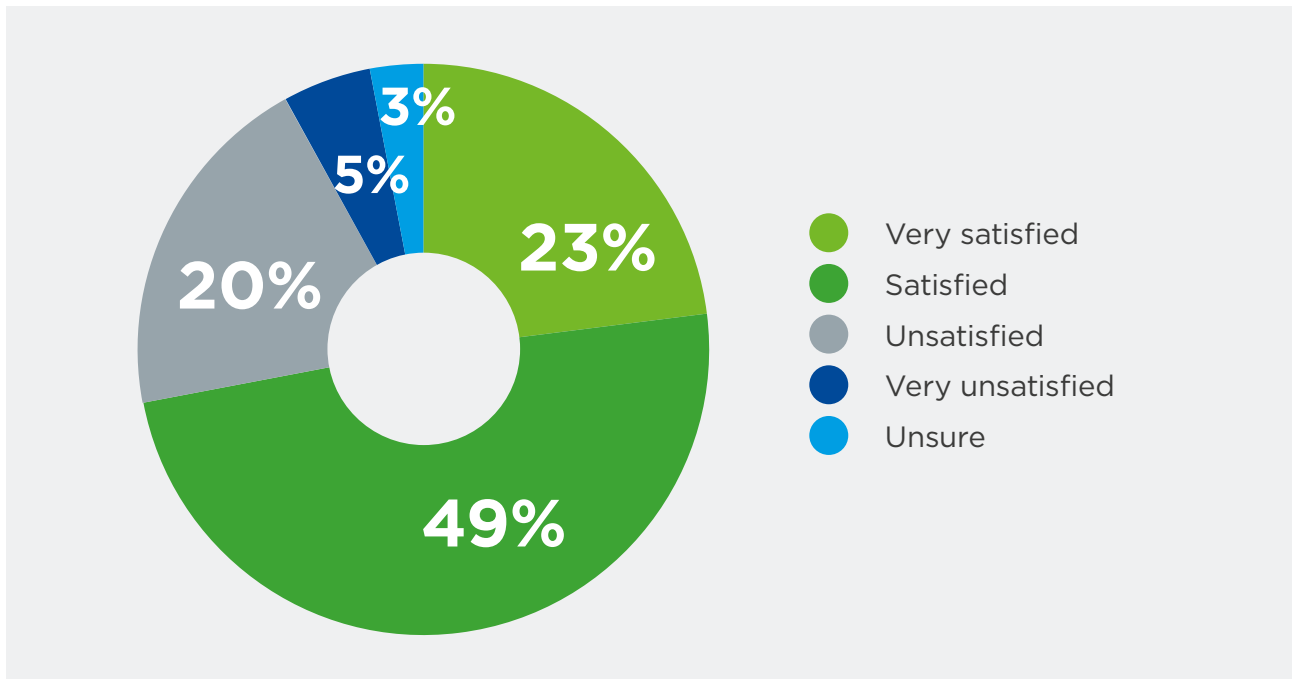


In terms of results per country, a resounding 99% of Swiss respondents indicated being 'satisfied' or 'very satisfied' with the sense of purpose that comes from their jobs. Countries representing the least satisfied end of the spectrum include Serbia (20% 'unsatisfied' or 'very unsatisfied') along with Slovakia, Romania and Italy, all registering 15% (very) unsatisfied in this area.

When it comes to the questions of feeling appreciated by one's employer, sense of work-life balance and satisfaction with compensation, the picture is a bit less rosy. One quarter of respondents indicated they are either 'unsatisfied' or 'very unsatisfied' when it comes to feeling valued by their employer (**Figure 14**), one third reported the same when it comes to work-life balance (**Figure 15**), and a full 40% are not satisfied by their salary or compensation level (**Figure 16**).

Figure 14

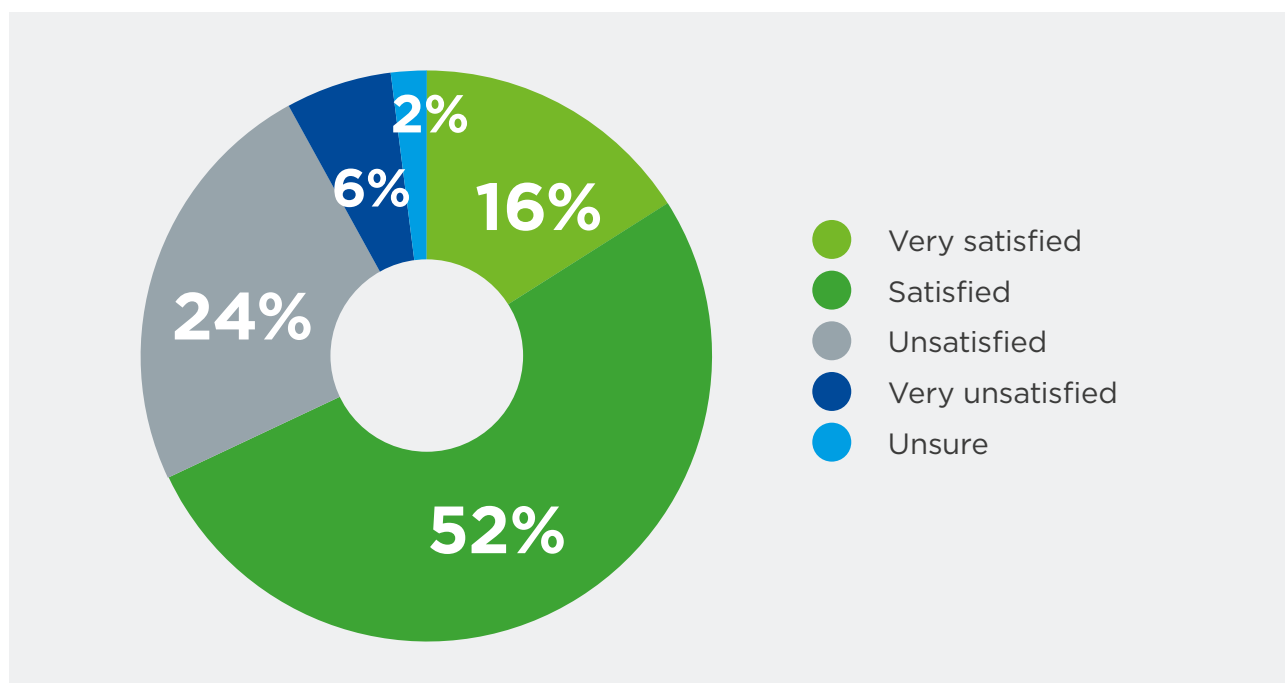
Feeling valued by employer (n=2423)



In regard to work-life balance, there is an interesting and sharp distinction between those who are very new to the sector (*ie* working for less than two years in international higher education) and those who have been employed for a period of three to five years in the field. Nearly three quarters (74%) of the earlier career respondents reported being (very) satisfied with their work-life balance, whilst just 34% of those with three to five years of experience in the sector indicated this same level of satisfaction. Something of a similar distinction can be seen across position types, whereby 74% of those identifying as ‘professional staff - specialist or coordinator or equivalent’ are (very) satisfied with work-life balance and a significantly smaller 49% of those identifying as ‘faculty member/academic staff or equivalent’ indicated being (very) satisfied in relation to work-life balance.

Figure 15

Work-life balance (n=2423)

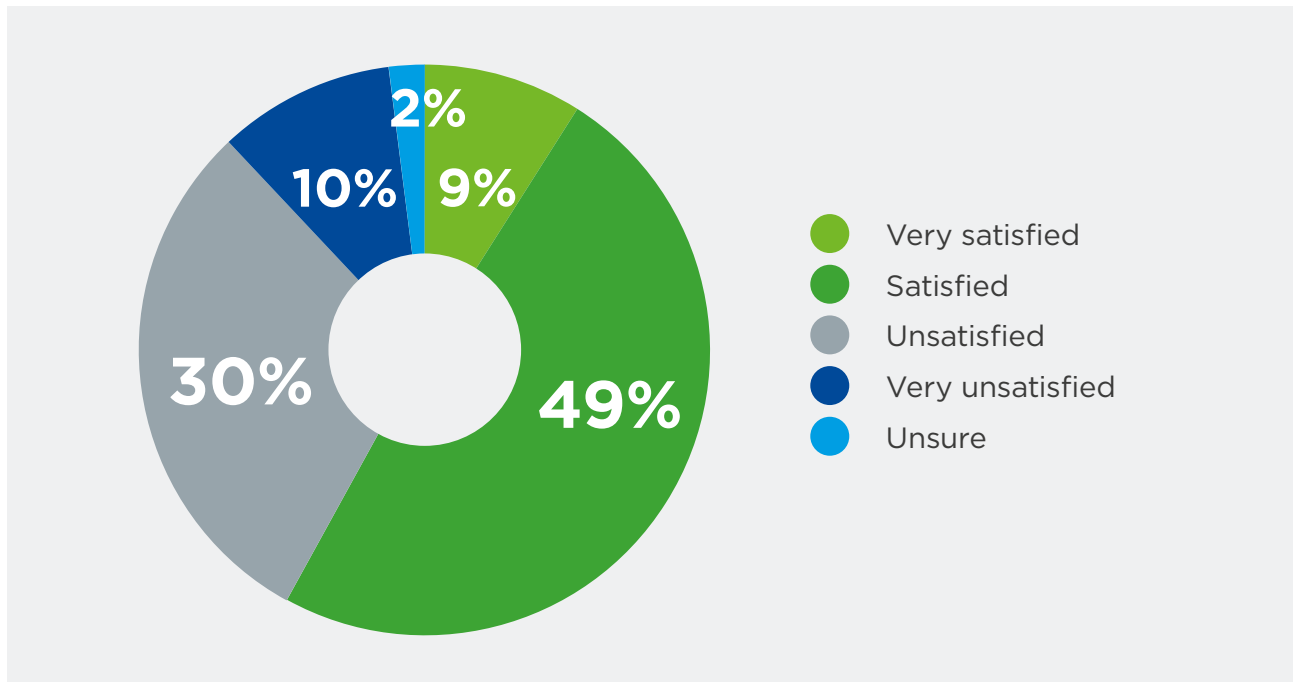


Considering this question from the perspective of respondents’ countries, the data indicates that those working in Spain and Denmark are most likely (around 80% to 90%) to enjoy satisfactory work-life balance, whilst those in Czechia and Ukraine (61% and 56%, respectively) are amongst the respondents least likely to report being (very) satisfied in this area.

Set against the strong indications of satisfaction with one’s overall job/role/position and sense of purpose, the data on satisfaction with salary or compensation is starkly different, at least in terms of the percentages of individuals who are ‘very satisfied’ with this aspect of their employment.

Figure 16

Salary or compensation level (n=2423)



As compared to the 9% of total respondents who report being 'very satisfied' with their salary/compensation, a notable 16% of those working at private higher education institutions and 22% working at other kinds of private organisations also report this same high level of satisfaction with their income. This same tendency toward satisfaction with salary/compensation can also be seen in relation to years of experience and in terms of type of role held. That is, those with more experience more frequently report satisfaction than those with less experience, whilst 72% of those holding 'other leadership' roles report being (very) satisfied with their salary against 52% of 'professional staff/specialist/coordinator' respondents and 51% of 'faculty/academic staff' respondents.

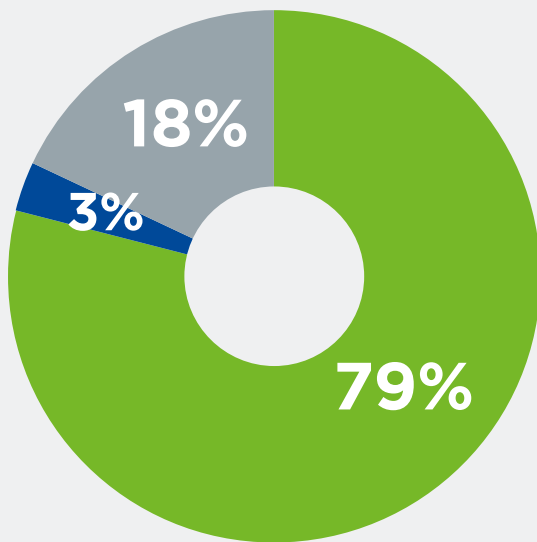
From a cross-country comparison perspective, Dutch and Swiss respondents are most often satisfied with their pay, whilst those from countries such as Ukraine, Italy, Poland and Slovakia are least likely to report satisfaction.

CHANGES IN ROLES AND PLANS TO STAY IN THE SECTOR

Perhaps in keeping with the overall high levels of work satisfaction, nearly 80% of respondents expect to still be working in international higher education in the next three years, whilst just 3% feel they will definitely leave the field within that timeframe (see **Figure 17**). Though inclined to stay in the field, nearly 10% of these same respondents indicate they expect to leave their current institution or organisation, and a full quarter of respondents are not sure if they will still be working for the same employer in three years' time (see **Figure 18**).

Figure 17

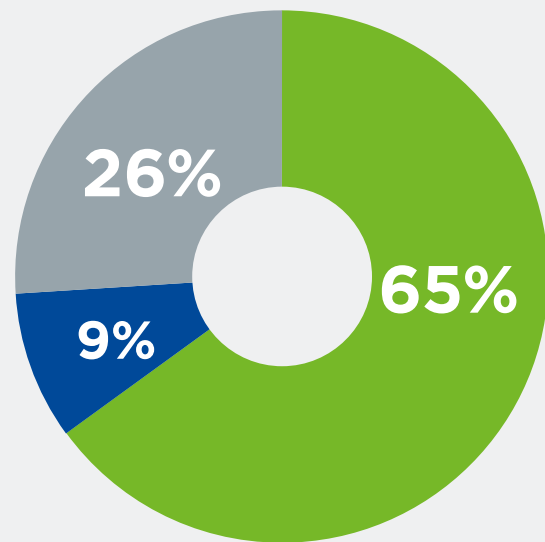
Plans to continue working in the field in the next three years
(n=2423)



● Yes ● No ● Unsure

Figure 18

Plans to continue working at the same institution/organisation in the next three years
(n=2426)



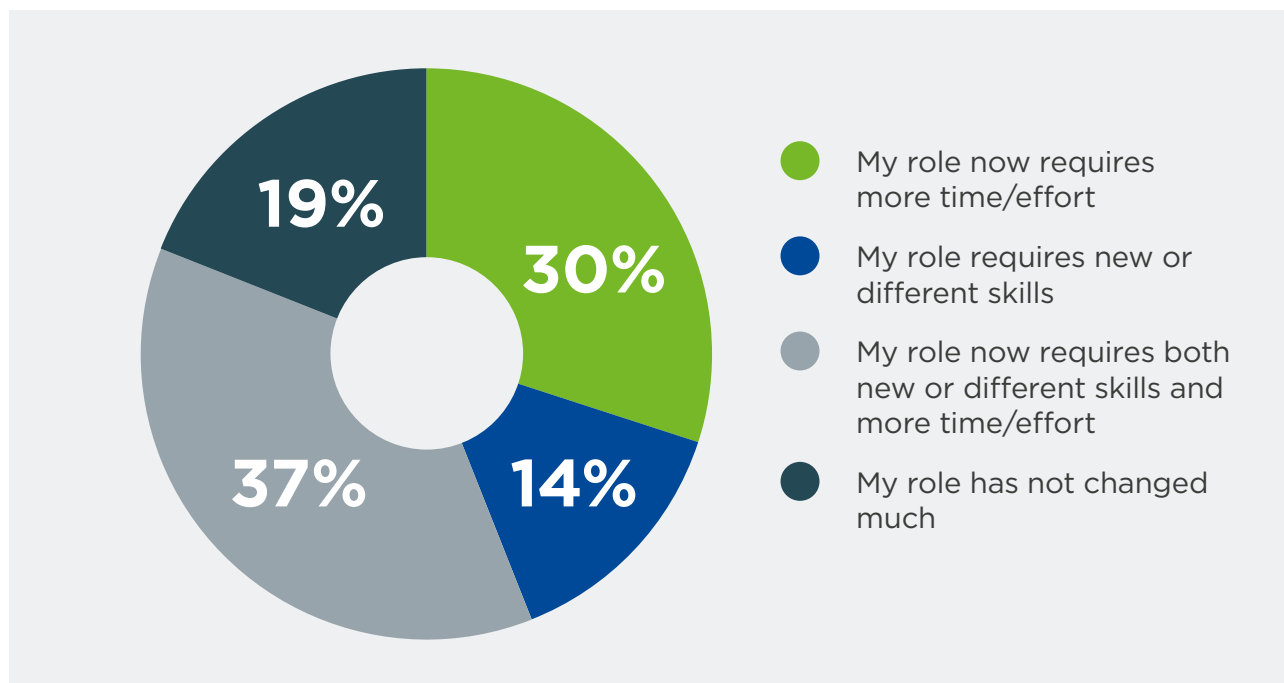
In comparison to the 3% of total respondents who do not see themselves working in the field in the next three years, countries with amongst the most sizable percentages of respondents with plans to exit the sector included Austria (15%), Poland (16%), Czechia (18%) and France (18%).

The primary reason cited for leaving the field was retirement, followed by lack of opportunities for advancement. Those providing additional information about why they might leave their specific institution/organisation also cited retirement and lack of career advancement opportunities, but also referenced the need for better pay, as well as issues such as poor management and not feeling valued by their current employer.

In addition to asking Barometer respondents to look ahead to the next three years, the survey also asked them to reflect on any perceived changes in their role over the *previous* three years. Amongst those respondents who have been working in the same position for that period of time, just over 80% indicate that their roles have changed in some way. Here, it is notable that the answer option most frequently selected by respondents (*ie* 37%) relates to an increase in both time and effort as well as the need for new or different skills (see **Figure 19**).

Figure 19

Perception of role changes over the past three years (n=1737)



When it comes to the specific new or different skills required by respondents in their jobs, a notable 40% referenced in some way digital skills, including AI. Leadership (22%) and project management (17%) were also amongst those new/different skills most frequently mentioned by respondents as relevant to the ways their roles had changed over the last three years. It is interesting here to reflect on the first iteration of the EAIE Barometer (2015), in which skills needs amongst internationalisation staff were also explored. At that time, the survey found that:

“On average, for HEI respondents within the EHEA there is a particular need to improve: a) project or programme management skills; b) staff management and leadership skills; c) skills for developing and maintaining international partnerships; d) marketing skills; and e) proficiency in foreign languages other than English.”
(p. 85)

Whilst the need for leadership and project management skills continues to resonate with professionals in the field, the rise in relevance of digital skills stands out as a notable new priority in this discussion.

Finally, highlighting the extent to which national contexts may differ with respect to role changes or stability, significant percentages of respondents from Hungary (35%), Sweden (36%) and Türkiye (36%) reported that their role has ‘not changed much’ over the last three years.

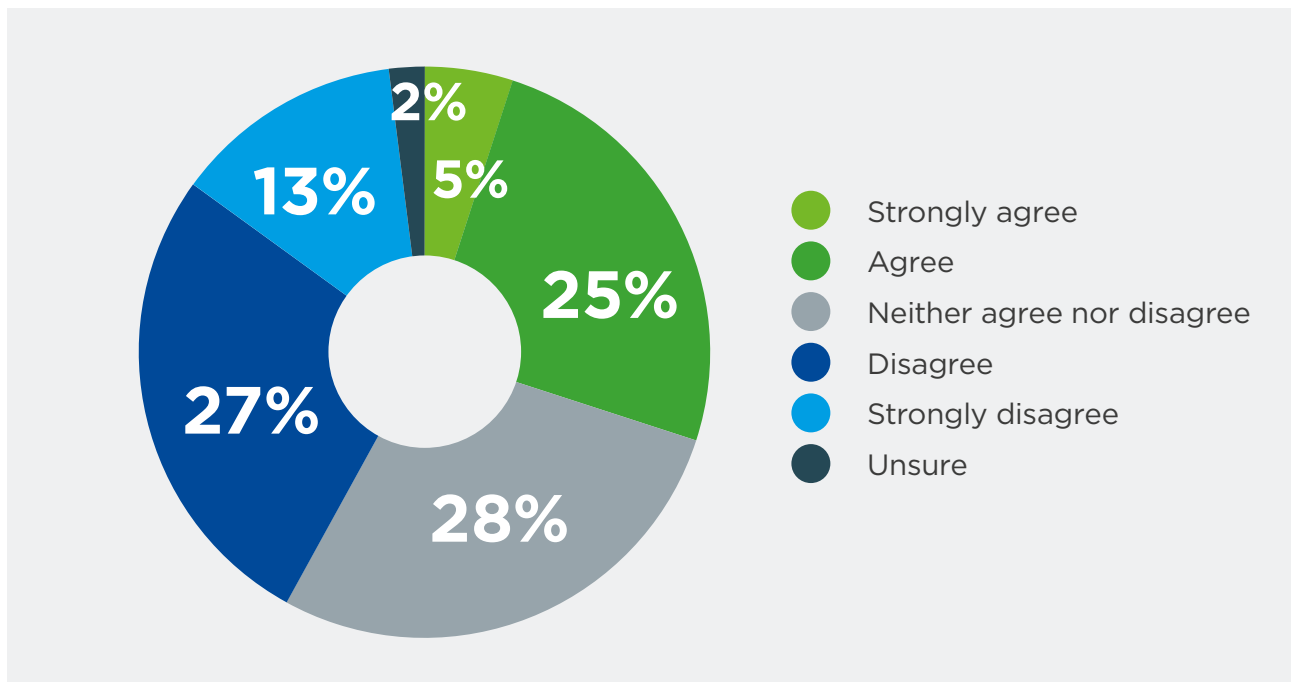
THE CONTINUING IMPORTANCE OF CAREER DEVELOPMENT OPPORTUNITIES

The opportunity to develop professionally and to imagine advancement across a defined career trajectory may be a key component of job satisfaction for individuals. At a more systemic level, the extent to which professional development opportunities are available can provide indications of the commitment that organisations are making to their staff and the seriousness with which they consider the domain in which international higher education professionals work.

When asked about the clarity of career development opportunities “from entry level to advanced level” at their institutions or organisations, just one third of EAIE Barometer respondents indicated agreement that a clear career trajectory exists. A larger percentage (40%) indicated that such a career trajectory is not visible to them at their employing institution/organisation, whilst a notable 28% were ambivalent on this question (see **Figure 20**).

Figure 20

Clear career development opportunities at my institution/organisation (n=2375)



A closer look at the Barometer data indicates that a sense of clear career development opportunities is much more prevalent amongst professionals who are working in private enterprises or the for-profit sector. Some 48% of respondents from these types of institutions/organisations (strongly) agree that such opportunities are available to them, as opposed to roughly a quarter of respondents at research universities or universities of applied sciences.

Additionally, the earliest career respondents (*ie* those with zero to two years in the field) were most likely (at 37%) to register (strong) agreement that clear career development opportunities exist at their institution or organisation. This stands in contrast to those with the most experience in the field (*ie* more than 15 years), 43% of whom (strongly) disagree that clear career development opportunities exist in their current place of employment. Meanwhile, when it comes to perceptions viewed through the lens of job roles, 49% of respondents who indicate holding 'professional staff/specialist/coordinator' positions (strongly) disagree that there are clear career development opportunities at their institution/organisation, whilst only 15% of respondents identifying 'other leadership' roles feel the same way.

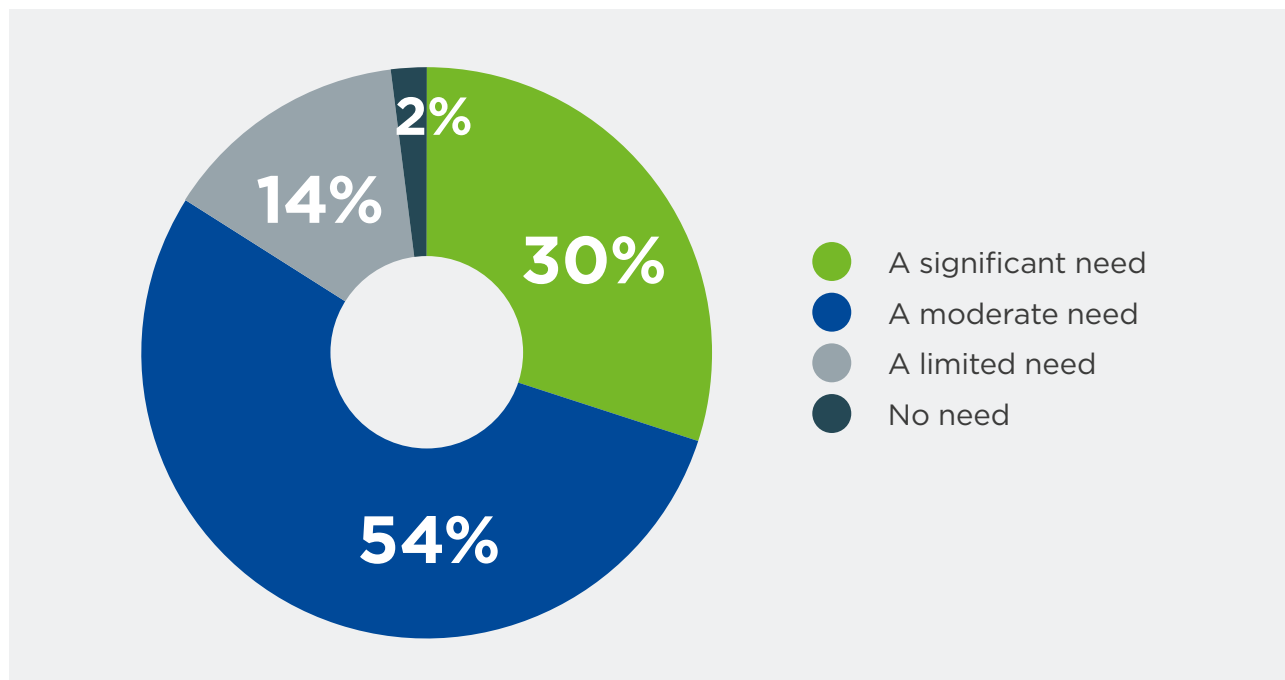
Different national pictures emerge from this data, as well. For example, respondents from Azerbaijan (63%), Romania (55%) and Ukraine (50%) most often (strongly) agree with this statement. The strongest levels of disagreement are seen in the responses from Italy (63%) and Germany (62%).

What may be most notable here is the spread of responses in **Figure 20** across the agree, disagree, and neither agree nor disagree answer options, which seems to suggest a rather fragmented overall set of perceptions about this matter amongst the total pool of respondents.

A much clearer picture emerged from the data in relation to the need for training or professional development (see **Figure 21**): nearly 85% of respondents overall perceive a ‘significant’ or ‘moderate’ need for access to such support in their current roles.

Figure 21

Need for training/professional development opportunities related to current role (n=2376)



Interestingly, the response rates in relation to a ‘significant need’ for training were quite similar across the full pool of respondents (averaging around 30%), no matter respondents’ years of experience in their current role or type of higher education institution. Those who identify as having a general focus of work on ‘European-funded programmes’ or ‘research on internationalisation’ were most inclined to say they have a ‘significant need’ for

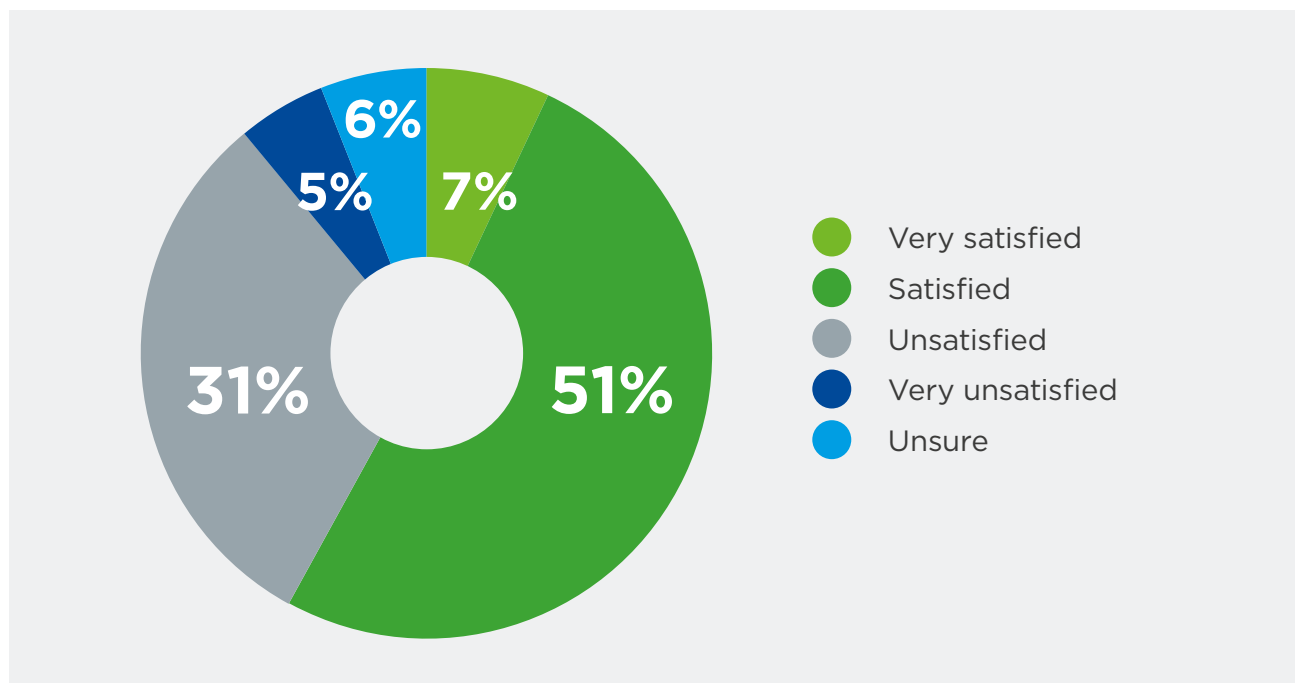
training, at 35% and 38% respectively. And those who indicate their general focus of work is 'leadership, strategy and policy' or 'social responsibility' most commonly reported – at 19% and 20%, respectively – having a 'limited need' for training in support of their roles.

When it comes to organisational types, the largest percentage of respondents indicating a significant or moderate need for training was evidenced by those international education professionals working at NGOs (90%), whilst those employed by private enterprises/companies/service providers were least likely to report a significant or moderate need for training (78%).

Against this backdrop of a clear sense of need for training, it is interesting to note that very few respondents – just 7% overall – are 'very satisfied' about the training/professional development opportunities their institution/organisation offers in relation to their role (see **Figure 22**).

Figure 22

Satisfaction with the training/professional development opportunities offered by institution/organisation related to current role (n=2324)



Respondents working in private for-profit/private enterprise/company contexts most frequently report high levels of satisfaction with the training/professional development opportunities offered by their employers. Those most frequently indicating they are (very) unsatisfied in this area are respondents with either three to five years of experience or six to ten years of experience. When it comes to satisfaction levels by role, individuals identifying as academic staff were most frequently (42%) unsatisfied or very unsatisfied, whilst those identifying as holding 'other leadership' roles were most frequently (71%) very satisfied. National highlights with respect to this question include significant rates of dissatisfaction amongst respondents from Norway and Switzerland (42% each), Hungary and Poland (46% each) and Italy (53%), but a significant 23% of respondents from Romania indicated being 'very satisfied' with their employer's training/professional development offer with respect to their role.

The survey included an open-ended question about "what contributes to your level of satisfaction with the professional development opportunities offered by your institution/organisation". Of the more than 1100 responses to this question, most (58%) simply referenced the fact that such a resource is available to them, whilst another 20% indicated either the partial lack or complete lack of such opportunities as a factor in their satisfaction levels in this area.

SECTION 2

HOW DO RESPONDENTS FEEL ABOUT THEIR INSTITUTIONS/ ORGANISATIONS?

SECTION HIGHLIGHTS

- Since 2015, it has become less common for Barometer respondents to report that their institutions rely on a single international office and more common to see reliance on central and decentral teams.
- More than one third of Barometer respondents indicated being (very) unsatisfied with how responsibilities for internationalisation are organised at their institution/ organisation and having low confidence in their leadership.
- Internationalisation was more often seen to be embedded in the overall institutional strategy instead of being articulated in a stand-alone strategy document.
- Whilst 56% of respondents believed the internationalisation goals set by their institution/organisation were clearly defined, a more convincing majority of 79% felt the goals were achievable.
- A clear strategy, inspiring and effective institutional leadership, and strong support amongst administrative and academic staff were considered the main drivers to successfully establishing a clearly defined set of goals for internationalisation.
- The influence of national authorities in driving institutional internationalisation goals proved to be quite high in individual countries such as Czechia (77%), Norway (76%), Türkiye (74%), Romania (69%) and the Netherlands (66%).
- When asked which topics required more attention for institutions to achieve their internationalisation goals over the next three to five years, the three topics most frequently chosen were: strengthening international/intercultural content of the curriculum (65%), virtual internationalisation activities (58%), and student/staff well-being (57%).

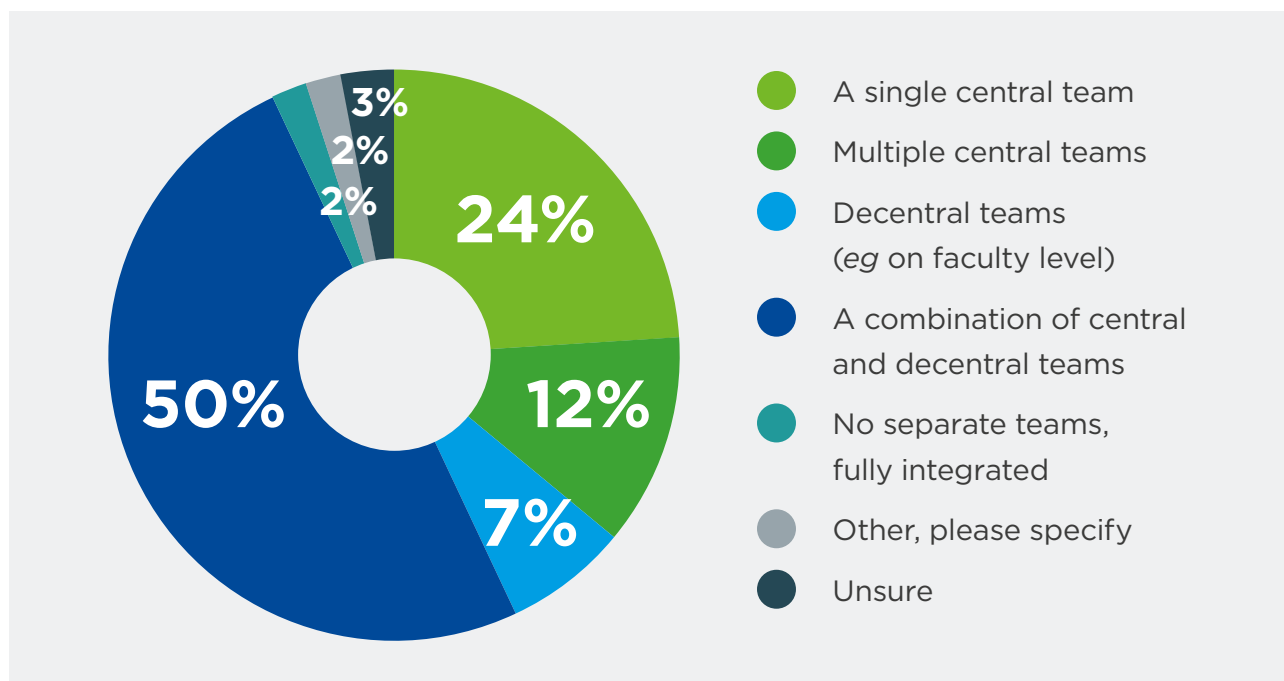
The previous section of this report looked in more detail at how respondents feel about their roles. Yet, topics such as job satisfaction, role changes during the past couple of turbulent years, and needs for professional development all have a crucial link: the place where it all comes together, *ie* higher education institutions and organisations. This section dives into respondents' workplaces and looks more closely at internationalisation strategies and goals, responsibility and leadership, drivers and stakeholders, and topics that require the most attention.

RESPONSIBILITY FOR INTERNATIONALISATION: ORGANISATION AND SATISFACTION

When respondents were asked how responsibility for internationalisation is organised at their institution, half of them indicated it tends to be a combination of central and decentral teams (see **Figure 23**). When we look back at the first Barometer report (2015), it is noticeable that at that time a single international office was the most common way to organise the implementation of internationalisation (51%), followed by multiple offices/teams working in coordination (24%).

Figure 23

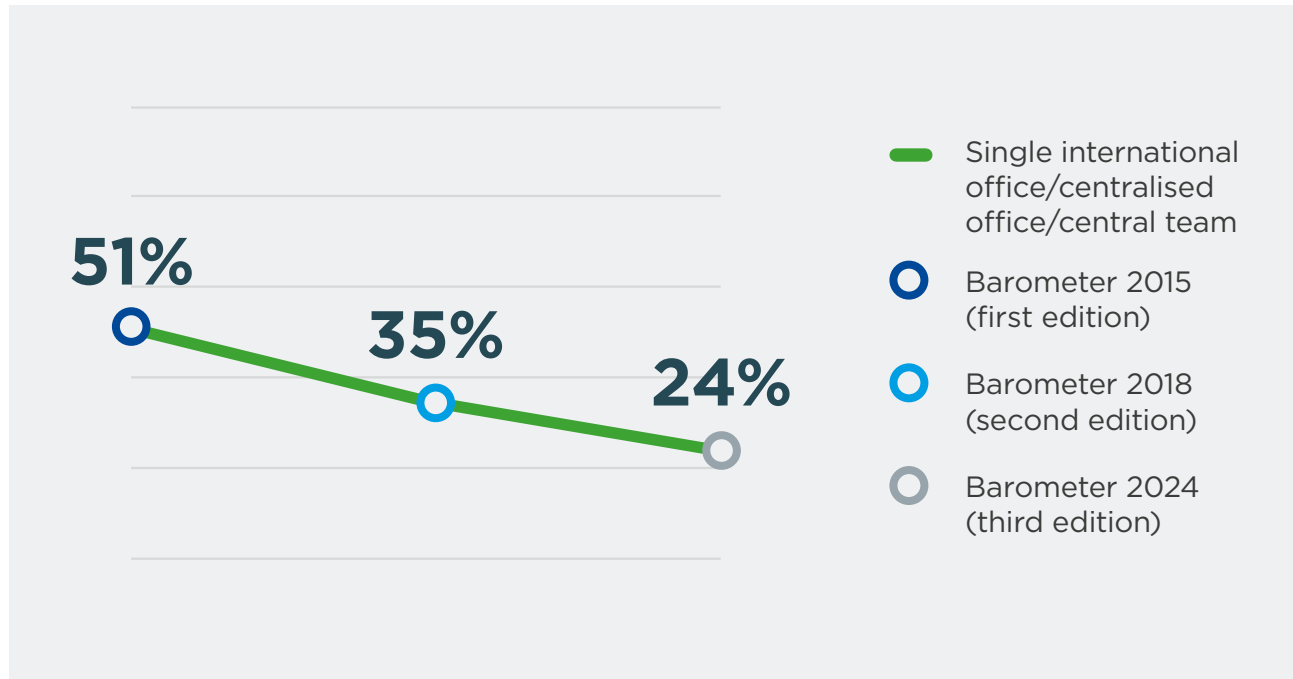
How is responsibility for internationalisation organised (*ie* structured) at your institution? (n=1954)



Three years later, in the Barometer 2018 report, this had slightly shifted to only 35% of respondents working with a single centralised internationalisation office, and an increase in working via multiple coordinated offices (from 24% to 40%). It is interesting to see how this trend has continued in the same direction, with the single central team taking a step back and the central/decentral teams structure rising in prominence (see **Figure 24**).

Figure 24

Change over time in how responsibility for internationalisation is organised



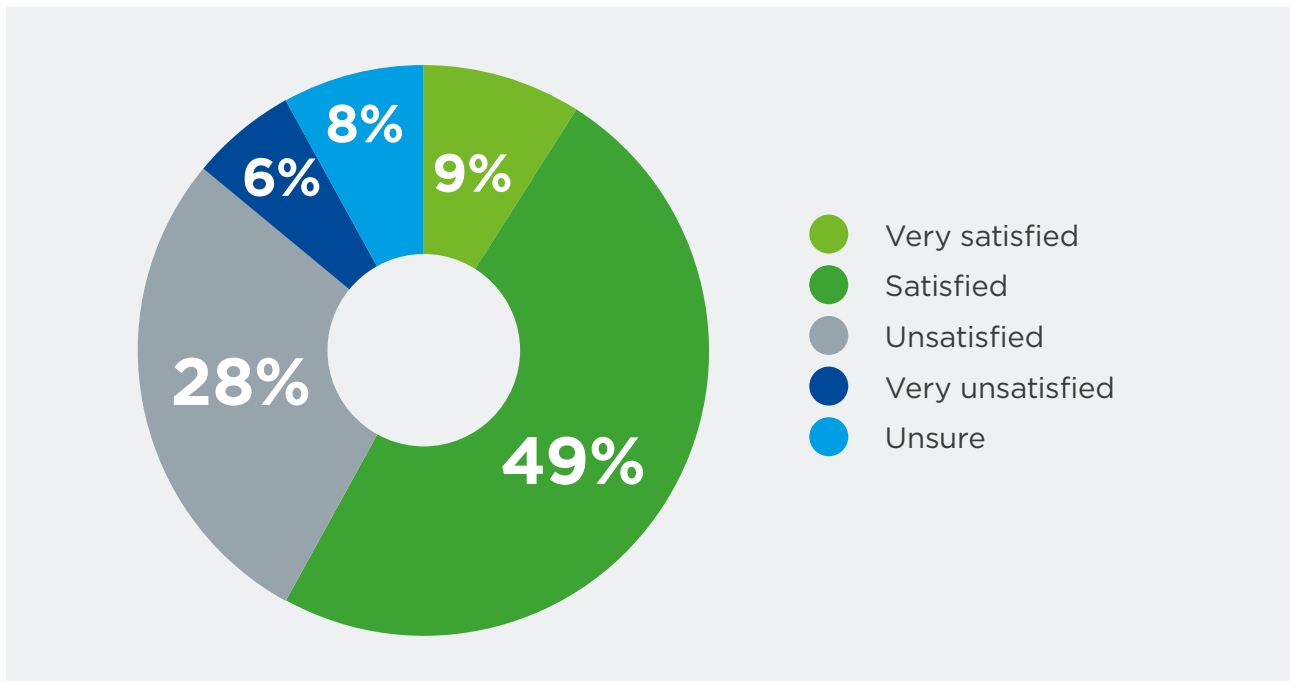
Considering institution type, more than half of the respondents working at research universities (52%) and universities of applied sciences (53%) indicated they work with a combination of central and decentral teams. Meanwhile, 39% of those working at specialised institutions reported that their institution relies on a single central team for internationalisation, which is well above the overall average of 24% shown in **Figure 23**). These findings by institutional type may in part be linked to institutional size: 43% of respondents from HEIs with 5000 students or fewer (which is the student body size indicated by 73% of respondents from specialised institutions) reported that internationalisation is the responsibility of a single central team, as opposed to just 17% of respondents from HEIs with more than 5000 students.

When looking at the different regions, Northern and Western Europe had over half of respondents indicating a combination of central and decentral teams, and 19% choosing a single central office. These two answer options were closer together for Southern and Eastern Europe (30% single team, 40–45% combination), with Western Asia as the only

region where the largest group of respondents (38%) indicated a single central team as the structure chosen, though this was closely followed by a combination of central and decentral teams (32%).

Figure 25

How satisfied are you with how responsibilities for internationalisation are organised (*ie structured*) at your institution/organisation? (n=2293)

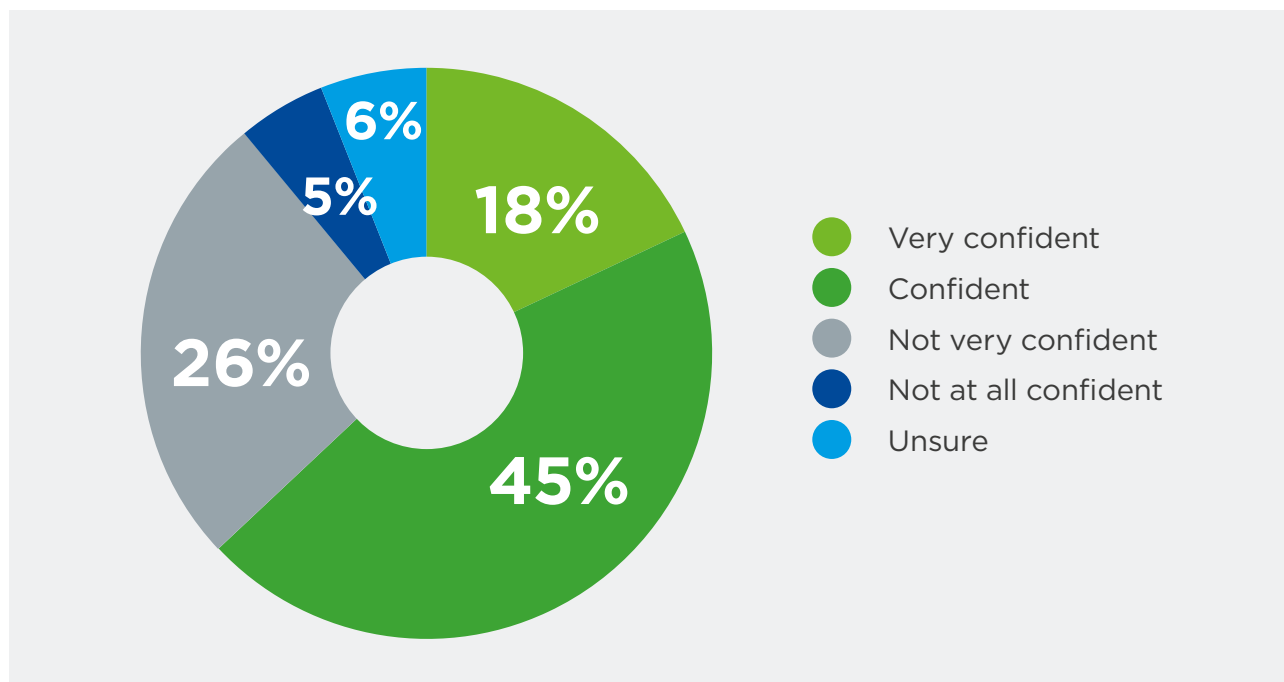


Zooming in on the question of satisfaction with how responsibilities for internationalisation are organised at institutions/organisations, as is visible in **Figure 25**, it is concerning to establish that over one third (34%) of Barometer respondents indicated being (very) unsatisfied, with another 8% being unsure. The highest percentage of respondents that indicated they were unsatisfied work at public institutions/organisations (29%), followed by private non-profits (27%) and private for-profits (19%). When looking at the different roles of respondents, close to one third of all categories chose the 'unsatisfied' answer option, except for 'other leadership', where this is 'only' 19%.

Individual countries that jump out with a relatively high percentage of unsatisfied respondents are Ireland (56%), Slovenia (50%), and Italy and Poland (49% each). On a more positive note, in Lithuania (81%), Denmark (78%) and Romania (74%) respondents indicated being (very) satisfied with the way internationalisation responsibilities are organised at an institutional level. Ultimately, the overall picture shows that over half of all respondents (58%) are (very) satisfied with how internationalisation responsibilities are organised at their institution.

Figure 26

How much confidence do you have in the leadership for internationalisation at your institution/organisation? (n=2288)



We see roughly the same percentages when looking at how much confidence respondents had in the leadership for internationalisation at their institution/organisation (see **Figure 26**). Whilst a majority indicated being (very) confident (63%), a third (31%) stated that they were not very, or not at all, confident. Confidence in leadership scored highest at the private for-profit institutions/organisations, with 33% being very confident (in contrast to 16% at public institutions, for example). Looking in more detail at the type of institution/organisation, NGOs and private enterprise/company/service providers scored considerably higher on satisfaction, with over 80% having confidence in their leadership. When looking at the different roles, ‘professional staff/specialist/coordinator’ (37%) and ‘faculty’ (38%) were the least confident, whilst ‘other leadership’ was most confident (82%).

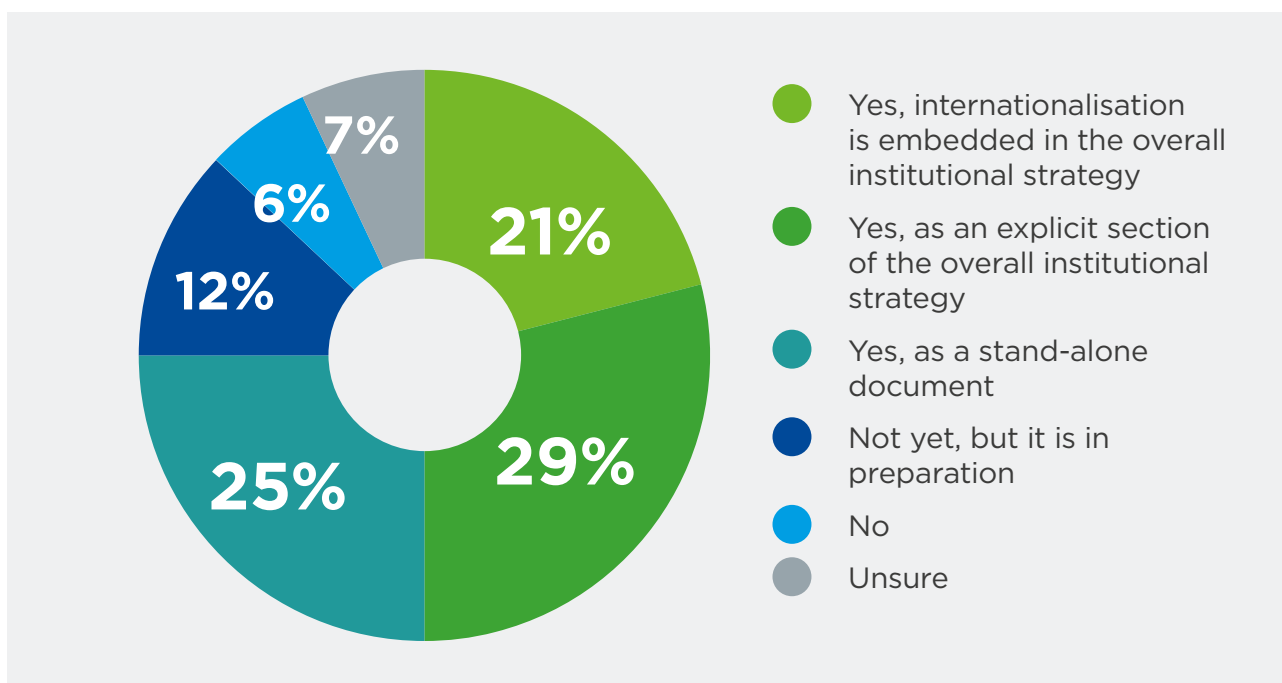
When looking at the different regions, Western and Northern Europe had the least confidence in leadership (35% and 34%), whilst in Western Asia 76% indicated feeling (very) confident about their leaders. Individual countries that stand out here are Italy, Poland and Serbia, where over 40% of respondents indicated being not confident in their internationalisation leadership, whilst Romania (86%), Azerbaijan (83%), and Armenia (79%) have a lot of faith in their leaders.

INTERNATIONALISATION STRATEGY: THE WHAT, WHY AND HOW

As **Figure 27** indicates, a convincing majority of respondents specified that their institution has a formal policy, strategy or plan for internationalisation, whether as a stand-alone document, an explicit section of the overall institutional strategy, or embedded in the overall institutional strategy. This largely aligns with the results collected by IAU (2024) in their 6th Global Survey on Internationalization, which indicates that Europe aligns with the rest of the world when it comes to this particular topic.

Figure 27

Does your institution have a formal policy, strategy or plan for internationalisation? (n=1950)



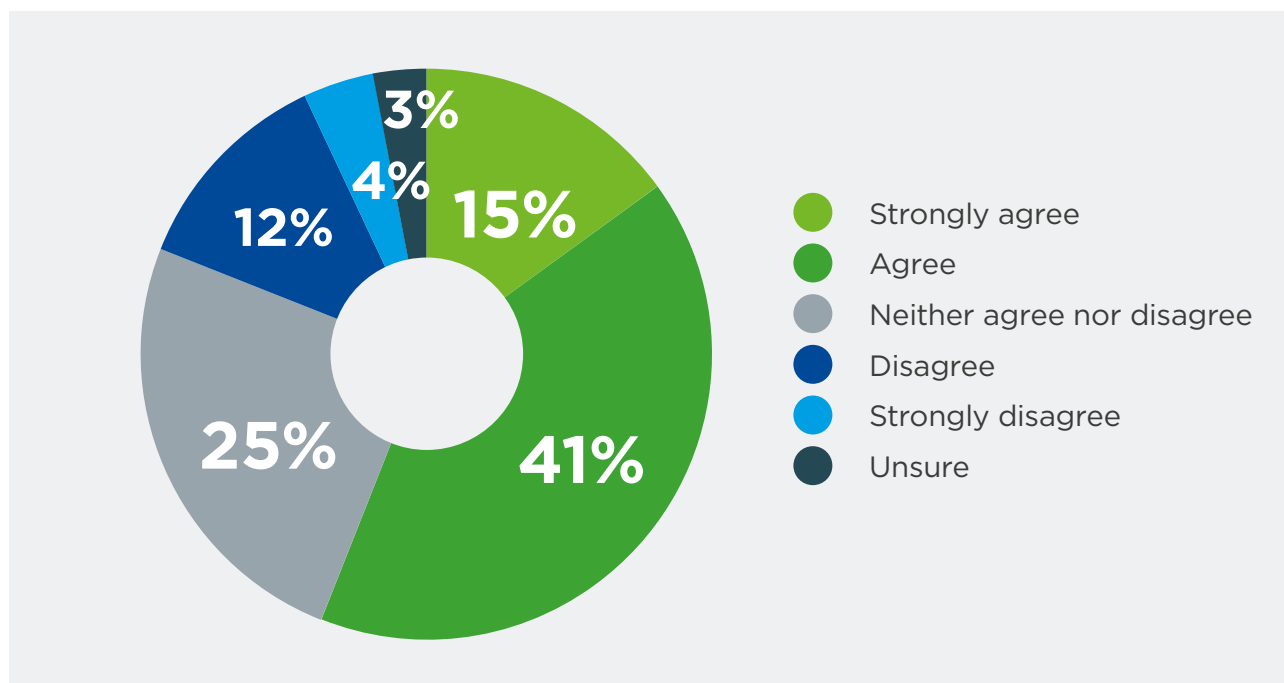
In the 2015 Barometer report, 46% of respondents reported that internationalisation was one of the priority areas addressed in the overall institutional strategy. This number decreased to 39% in the second Barometer edition in 2018, and has now further decreased to 29%. Furthermore, in the first edition 38% of respondents shared that their HEI had a separate strategic plan for internationalisation, which is a number that remained roughly the same three years later (39%). In 2023, fewer institutions report having a stand-alone strategy document for internationalisation (25%) in comparison to the past Barometer reports. Instead, it seems to be more common today to simply embed internationalisation in the overall institutional strategy, which is the answer option chosen by 21% of all respondents. This points to a gradual trend towards embedding internationalisation in the overall institutional strategy, as part of everything an HEI undertakes and aims to accomplish.

Similar to the 2018 Barometer report, it is worth noting that 7% of respondents were unsure about their institution's internationalisation strategy. This includes academic staff in particular, which indicates that this might be a stakeholder group that is not always as effectively involved in internationalisation endeavours. One in five respondents with fewer than two years of experience working in international higher education also indicated they are unsure. This is not surprising, since these respondents might be quite new in their jobs and thus not completely aware of the internationalisation strategy at their institution.

Analysis of the findings by country reveals some pronounced differences in how internationalisation strategies are set up. Whilst in both Finland and Lithuania internationalisation tends to be embedded in the overall institutional strategy (44%), institutions in countries such as Ukraine (42%) and Serbia (41%) more often work with a stand-alone document. Surprisingly, various Northern/Western European countries recorded some of the highest percentages of respondents with no internationalisation strategy at all, namely Denmark (24%), Norway (14%), and France (12%).

Figure 28

My institution has a clearly defined set of goals for internationalisation (n=1947)

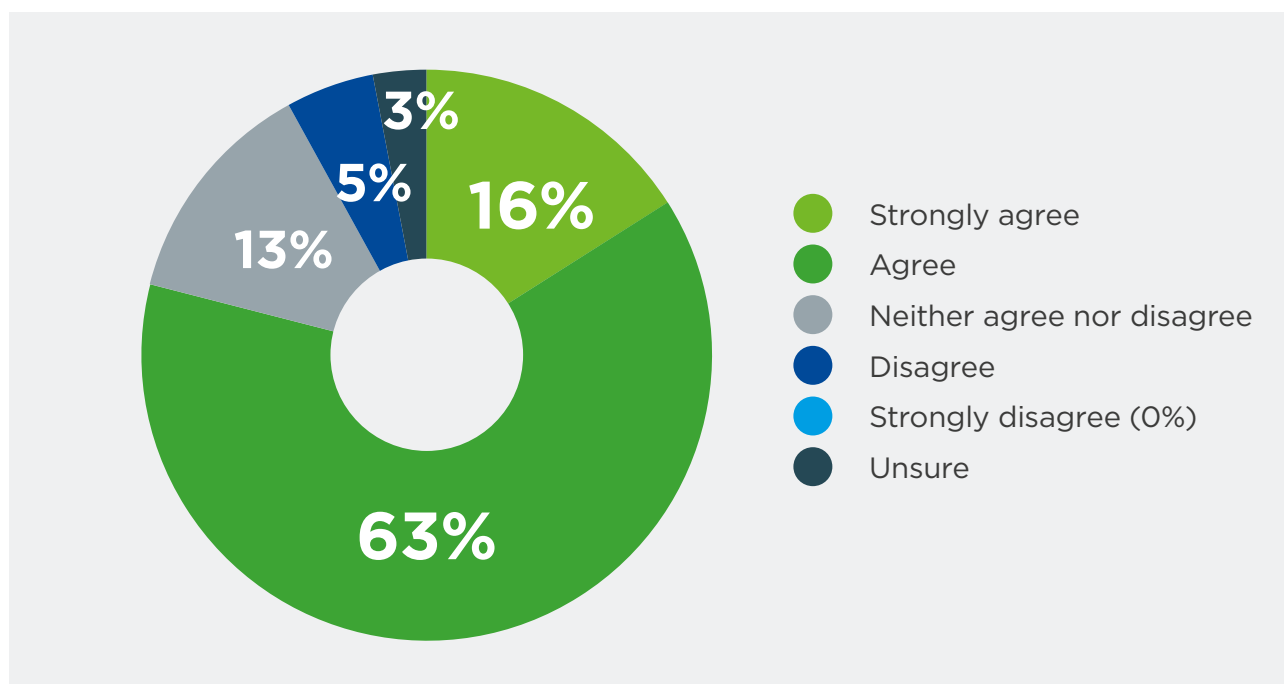


Next to having an internationalisation strategy in one form or another, respondents were also asked whether the goals are clearly defined or not, for which the results can be found in **Figure 28**. Whilst over half (56%) agreed with this statement, it is interesting to see that a quarter of respondents were not sure about this and another 16% (strongly) disagreed. When looking at the different regions, there is some variation visible. Whilst

in Western Asia (69%) and Eastern Europe (67%) more than two thirds of respondents (strongly) agreed with this statement, Northern Europe comes last with 'only' 49% in agreement. Disagreement is highest in Denmark (41%), Switzerland (27%), Italy and Norway (26% each). According to respondents, institutions with a clearly defined set of goals for internationalisation can be found more readily in Romania (86%), Armenia (74%), Czechia (73%) and Ukraine (72%).

Figure 29

My institution's goals for internationalisation are achievable (n=1089)



Even though **Figure 28** showed that there is a bit of doubt across the EHEA about whether internationalisation goals are clearly defined or not, a convincing majority (79%) did feel their institution's goals are achievable (see **Figure 29**). Specialised institutions had an especially positive response to this statement, with 90% (strongly) agreeing, and only 1% disagreeing.

When looking at the categories describing the general focus of respondents' work, there are also some intriguing differences. Whilst people with jobs linked to 'European-funded programmes' (83%) and 'research on internationalisation' (82%) most commonly felt their institution's goals for internationalisation are achievable, it is especially striking to see that those who linked their jobs to 'social responsibility' most frequently disagreed with this statement, namely 15%.

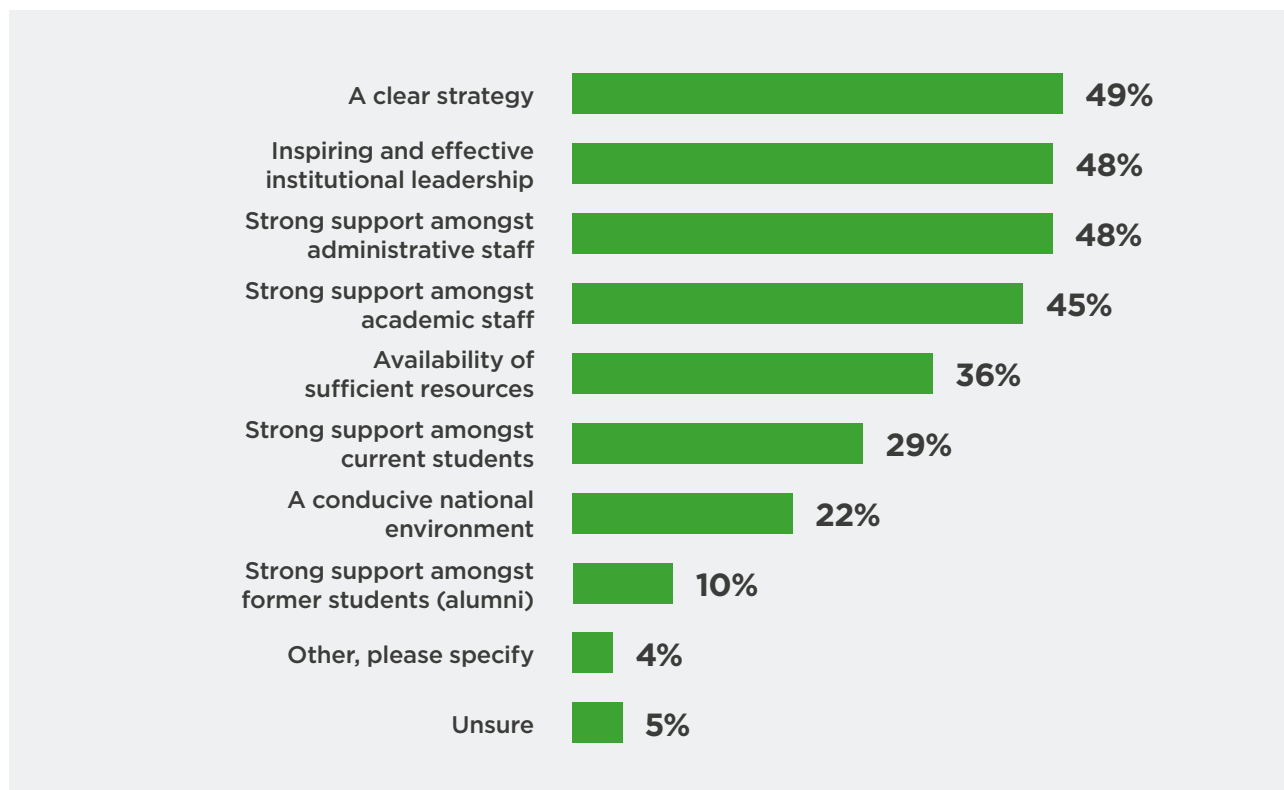
A closer look at individual country response rates shows that perceptions of the achievability of goals were highest in Armenia, Greece and Portugal (92% each), followed closely by Ukraine (91%). Doubt that goals are achievable was highest in Norway (24%), closely followed by Ireland (22%) and Slovenia (17%).

MAIN DRIVERS AND INFLUENTIAL STAKEHOLDERS

After asking about the clarity and achievability of institution’s internationalisation goals, we were also interested to look in more detail at the main drivers that helped establish these goals. Respondents were able to select multiple answers, and the top four answer options all scored between 45% and 49% (see **Figure 30**). Whilst strong support amongst faculty featured amongst the top answers, it seems the availability of resources and strong support amongst current/former students have been less influential.

Figure 30

What are some of the main drivers that you think have allowed your institution to successfully establish a clearly defined set of goals for internationalisation? (select all that apply) (n=854)



Taking into consideration the different roles of respondents, each group seemed to consider themselves as an important main driver. Over half of the heads of international offices and 64% of respondents that fall within the ‘other leadership’ group chose ‘inspiring and effective institutional leadership’ as the main driver. Similarly, the ‘faculty/academic staff’ respondents four most frequently selected ‘strong support amongst academic staff’ (51%) and ‘professional staff – specialist/coordinator’ respondents (54%) saw ‘strong support amongst administrative staff’ as a crucial main driver.

In all regions the most frequently selected answers were overall the same, as can be seen in **Figure 31**, with small changes in the top choice. Whilst in Northern, Western and Southern Europe a clear strategy was considered the main driver to successfully establish those clearly defined goals for internationalisation, Eastern Europe saw strong support amongst academic staff as the main driver, and in Western Asia this was strong support amongst administrative staff.

Figure 31

Main drivers to successfully establish a clearly defined set of goals for internationalisation, by region

Region	Eastern Europe (n=198)	Northern Europe (n=153)	Southern Europe (n=168)	Western Europe (n=259)	Western Asia (n=76)
A clear strategy	49%	52%	51%	48%	43%
Inspiring and effective institutional leadership	50%	52%	50%	41%	53%
Strong support amongst administrative staff	49%	48%	42%	46%	63%
Strong support amongst academic staff	52%	38%	41%	43%	55%
Availability of sufficient resources	31%	42%	31%	42%	32%
Strong support amongst current students	36%	23%	25%	26%	38%
A conducive national environment	29%	26%	14%	19%	21%
Strong support amongst former students (alumni)	17%	8%	10%	6%	13%
Other	3%	7%	2%	7%	0%
Unsure	4%	7%	5%	5%	1%

Per region: ● most common choice
 ● second most common choice ● third most common choice

When looking at the options that were chosen least, former students (alumni) came out as the least important driver in all regions but scored the lowest in Western and Northern Europe. Other interesting data from this overview includes the fact that – in comparison with respondents from other regions – those from Eastern Europe were more inclined to cite the importance of a conducive national environment (29%), closely followed by Northern Europe (26%).

Figure 32

How would you characterise the influence of the following stakeholder groups in driving your institution’s internationalisation goals? (n=1924)

	Highly influential	Influential	Somewhat influential	Not at all influential	Unsure
Executive board/team	39%	35%	16%	4%	5%
Academic staff	19%	42%	30%	6%	2%
Administrative staff	11%	32%	36%	18%	3%
Current students	10%	29%	38%	18%	4%
Former students (alumni)	5%	15%	27%	42%	12%
External advisory board	5%	16%	24%	27%	28%
National authorities	20%	38%	26%	8%	9%
European level authorities	17%	36%	26%	9%	12%

Per level of influence: ● most common choice
 ● second most common choice ● third most common choice

People are crucial when it comes to actually realising particular goals, so one question in the Barometer survey focused on the influence of stakeholder groups in driving institutional internationalisation goals. As can be seen in **Figure 32**, the two groups that came out as most influential were the executive board/team (considered by 74% as influential or highly influential) and academic staff (considered by 61% to be influential or highly influential, and by another 30% to be at least somewhat influential). In addition to national and European-level authorities (see Section 4 of this report), current students were considered as an important voice as well, with two thirds indicating them as (somewhat) influential. This in contrast to former students (alumni), who were considered not at all influential by 42% of respondents. It is also noteworthy that 28% of respondents were unsure about the possible influence of an external advisory board, or considered them not all influential (27%).

Diving into individual country details shows that the executive board/team was considered (highly) influential in most countries by over 55% of respondents. An exception here is Norway, where only 30% considered this group influential, and another 10% as highly influential.

Former students (alumni) were already identified as a stakeholder group that does not seem to be considered influential, but especially in Scandinavia this group scored significantly low on this question. Meanwhile, the influence of national authorities scored quite high in such places such as Czechia (77%), Norway (76%), Türkiye (74%), Romania (69%) and the Netherlands (66%).

Respondents were additionally asked to indicate which topics, from a predetermined list developed through extensive environmental scanning, they perceive as requiring more, less or continued levels of attention in order for their institution to achieve its internationalisation goals in the coming three to five years. It is important to note that respondents were *not asked to rank or indicate priorities* across the various topics of interest; they were asked to indicate whether a particular topic needs *more/less attention*.

Figure 33

What level of attention do the following topics require for your institution to achieve its internationalisation goals over the next 3–5 years? (n=1908)

	More attention	Continued level of attention as now	Less attention	Unsure	Does not apply to my institution
Crisis preparedness/management	42%	43%	5%	10%	1%
Data/knowledge security	42%	43%	4%	10%	1%
Digitalisation of administrative tasks	56%	35%	3%	5%	0%
Environmental sustainability and climate action	52%	37%	4%	6%	1%
Inclusion and diversity	50%	42%	3%	5%	0%
International development and capacity building projects	50%	38%	4%	8%	1%
Local/regional community engagement and/or development	38%	46%	5%	10%	2%
Partnerships and networks	50%	46%	2%	2%	0%
Recruiting international talent (students/staff)	52%	33%	7%	6%	2%
Research collaborations and outputs	47%	43%	3%	7%	1%
Strengthening international/intercultural content of the curriculum	65%	29%	3%	3%	0%
Student/staff mobility	51%	45%	2%	2%	0%
Student/staff well-being	57%	38%	2%	3%	0%
Virtual internationalisation activities (COIL, virtual exchange, etc)	58%	28%	6%	7%	1%

● Above 59% ● 50%–59% ● 40%–49%

As can be seen from **Figure 33**, respondents seem to feel that all of the topics require *more or continued attention*. However, when it comes to those specifically requiring ‘more attention’ for institutions to achieve their internationalisation goals over the next three to five years, the three topics chosen most frequently were ‘strengthening international/intercultural content of the curriculum’ (65%), ‘virtual internationalisation activities’ (58%), and ‘student/staff well-being’ (57%). When looking at the topics that overall scored the highest on receiving *more attention or a continued level of attention as now*, ‘partnerships and networks’ (96%) and ‘student/staff mobility’ (96%) took the lead.

A regional perspective on this data reveals several interesting insights. ‘Strengthening international/intercultural content of the curriculum’ was most frequently selected as the topic to receive ‘more attention’ for all individual regions, but as seen in **Figure 34** it appears that respondents across *all* regions feel that all of the key topics included in this analysis need more or continued levels of attention. Still, there are a few notable region-specific results to highlight.

Figure 34

More and continued levels of attention to topics of interest, by region

Topics of interest	Eastern Europe (n=336)	Northern Europe (n=457)	Southern Europe (n=340)	Western Europe (n=648)	Western Asia (n=127)
Crisis preparedness/management	88%	85%	86%	81%	87%
Data/knowledge security	85%	86%	87%	82%	86%
Digitalisation of administrative tasks	92%	88%	94%	91%	94%
Environmental sustainability and climate action	88%	89%	88%	91%	90%
Inclusion and diversity	89%	91%	92%	94%	94%
International development and capacity building projects	94%	81%	93%	83%	96%
Local/regional community engagement and/or development	88%	77%	91%	83%	88%
Partnerships and networks	98%	94%	96%	95%	98%
Recruiting international talent (students/staff)	90%	86%	88%	80%	89%
Research collaborations and outputs	97%	87%	92%	86%	98%
Strengthening international/intercultural content of the curriculum	95%	92%	96%	93%	94%
Student/staff mobility	97%	95%	97%	95%	98%
Student/ staff well-being	94%	94%	96%	93%	95%
Virtual internationalisation activities (COIL, virtual exchange, etc)	86%	87%	88%	85%	84%

For example, 'inclusion and diversity' was chosen more often as a 'needs more attention' topic by respondents in Western Europe than by those in other regions. Eastern European respondents were most inclined (61%) to select 'digitalisation of administrative tasks' as a 'needs more attention' topic, while respondents from Western Asia (51%) were least apt to point to this topic. As seen in **Figure 34**, the responses from Eastern and Southern Europe, as well as Western Asia show a stronger interest in both 'research collaborations and outputs' and 'international development and capacity building projects', as opposed to Northern and Western Europe. Perhaps the most notable finding here is the relatively smaller percentages of respondents based in Northern and Western Europe who see the need for more or continued attention to the topic of 'international development and capacity building projects,' as compared to other regions.

Whilst none of the topics stand out as needing to receive *less* attention, it is interesting to note that in both Western Europe and Western Asia, 10% of respondents indicated less attention should be given to 'recruiting international talent (students/staff)', as well as 11% of respondents from Western Asia drawing the same conclusion for 'virtual internationalisation activities.'

Respondents were asked more questions on topics of interest; the data on this can be found in Section 6.

SECTION 3

PERCEPTIONS ABOUT BUDGETS

SECTION HIGHLIGHTS

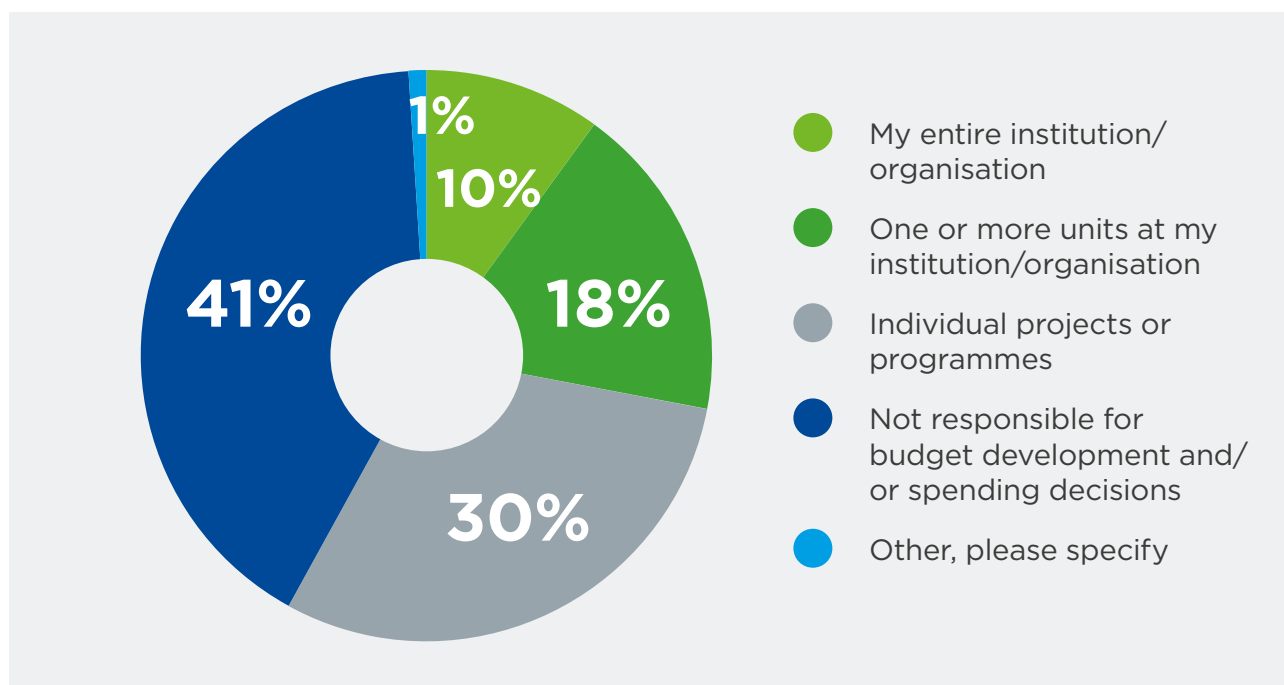
- Well over half of respondents (58%) indicated having some type of budget or spending responsibilities in the context of their work.
- More than 70% of respondents were 'satisfied' or 'very satisfied' with the size of the budget they work with; a similar percentage perceived the source(s) of the budget they are responsible for as either 'very' or 'somewhat stable/predictable'.
- Respondents working at research universities were most likely to express dissatisfaction with the budgets they are responsible for (26%).
- When looking at the stability of budgets, some variation across regions was perceived, with higher percentages of respondents noting unstable/unpredictable funding sources in Northern Europe (29%) and Eastern and Southern Europe (28%) than in Western Europe (23%) and Western Asia (22%).
- When asked what they would do if presented with a significant infusion of financial support, the largest percentage of respondents (34%) indicated that they would focus on adding additional staff or providing more opportunities for existing staff, including training, higher pay/compensation and other activities geared towards retention and staff happiness in general.

Whether internationalisation is undertaken as a revenue generation exercise or as a non-profit activity, financial supports are still required to ensure the viability of programmes, activities and initiatives. Notably, the EAIE Barometer (second edition, 2018) reported that insufficient financial resources were most frequently cited by respondents when it came to both internal and external challenges to internationalisation. Indeed, just under 40% saw ‘insufficient internal budget’ as a top internal challenge and 31% of respondents cited ‘insufficient external funding’ as a top external challenge.

To shed some light on perceptions about the size and stability of budgets dedicated to internationalisation efforts more than five years later, this edition of the EAIE Barometer sought input on several key questions on this topic, but this time specifically from individuals with budget responsibilities – whether at the level of individual projects or programmes, for one or more units within their institution, or for their entire organisation. As seen in **Figure 35**, just under 60% of respondents indicated having some type of budget or spending responsibilities in the context of their work.

Figure 35

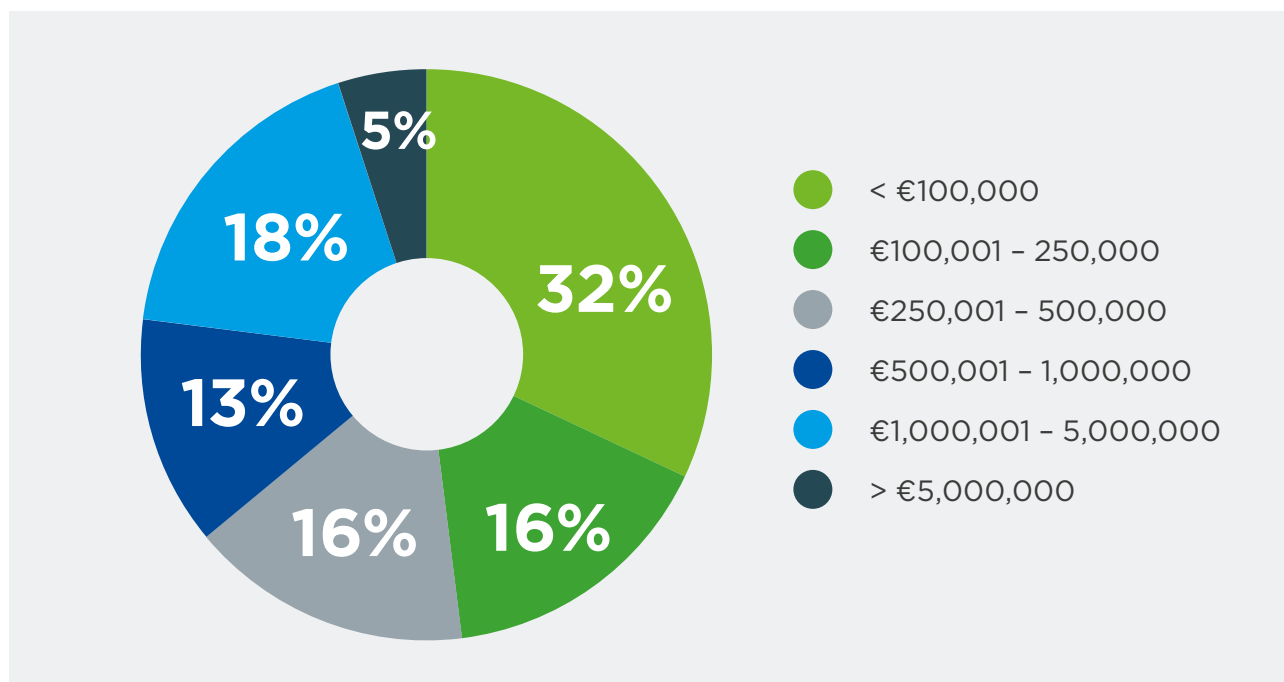
I have spending and/or budget responsibilities for... (n=2542)



Amongst those with such responsibilities, the largest percentage (roughly one third) indicated that they work with budgets of €100,000 or less, whilst 23% of respondents with budget responsibilities indicated that they are responsible for budgets of over €1 million (see **Figure 36**).

Figure 36

Please estimate the size of the budget you are responsible for (n=1459)

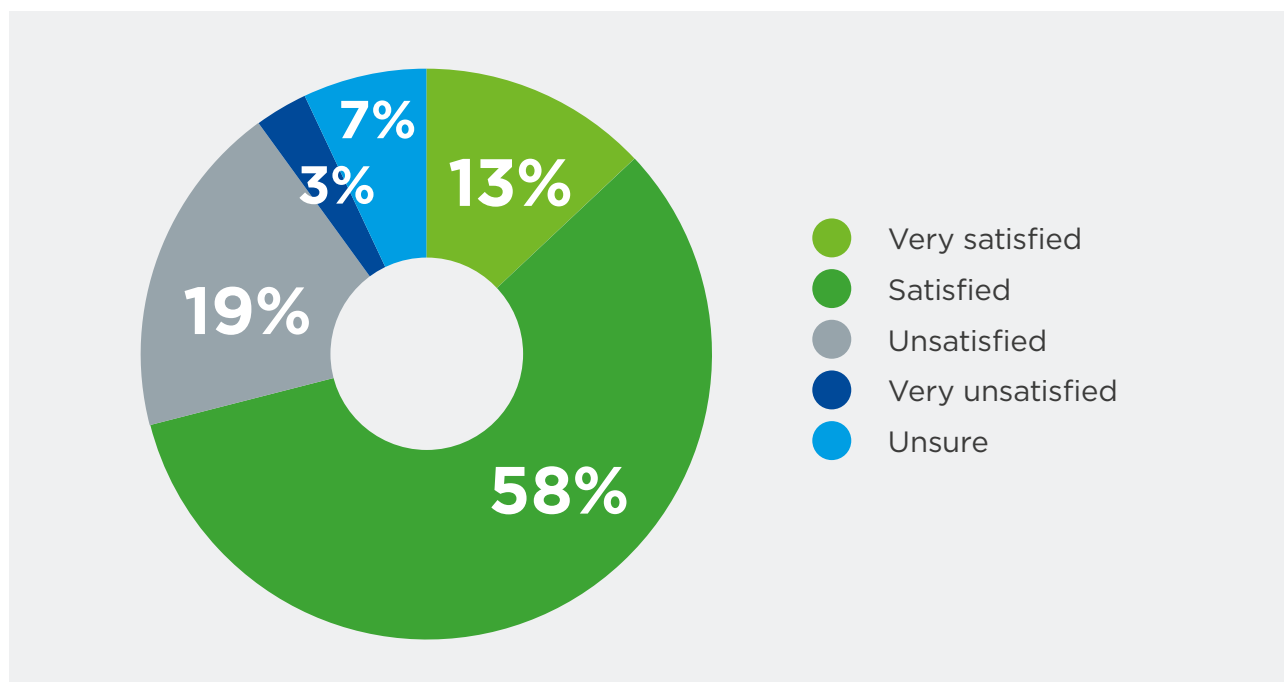


SATISFACTION WITH THE SIZE AND STABILITY OF BUDGETS

When it comes to satisfaction levels with the size and stability of these budgets, the picture is rather positive. Just over 70% are ‘satisfied’ or ‘very satisfied’ with the size of the budget they work with (see **Figure 37**). Those individuals responsible for the largest budgets (*ie* €5 million or more) were much more likely (at 26%) to indicate being ‘very satisfied’ with their budgets than those working with smaller budget amounts, only 10% to 15% of whom selected the ‘very satisfied’ option for budget size.

Figure 37

How satisfied are you with the size of the budget you are responsible for?
(n=1452)



Respondents working at research universities were more likely to express dissatisfaction with the budgets they are responsible for than those from other institutional/organisational types: 26% of those individuals reported being unhappy with the budget amounts they work with, whilst just 11% of those who work for a ministry or agency were similarly dissatisfied. Individuals holding 'faculty/academic staff' or 'other leadership' roles were the largest groups to report being dissatisfied with the budgets they are responsible for, and higher rates of dissatisfaction by country could be seen in Croatia and Greece (33%), Türkiye (40%), Azerbaijan (44%) and Ukraine (56%). On the other side of the coin, the countries featuring some of the highest percentages of respondents who are 'very satisfied' with the budgets they are responsible for include Finland (24%), Slovenia (28%), Romania (30%) and (again) Azerbaijan (31%).

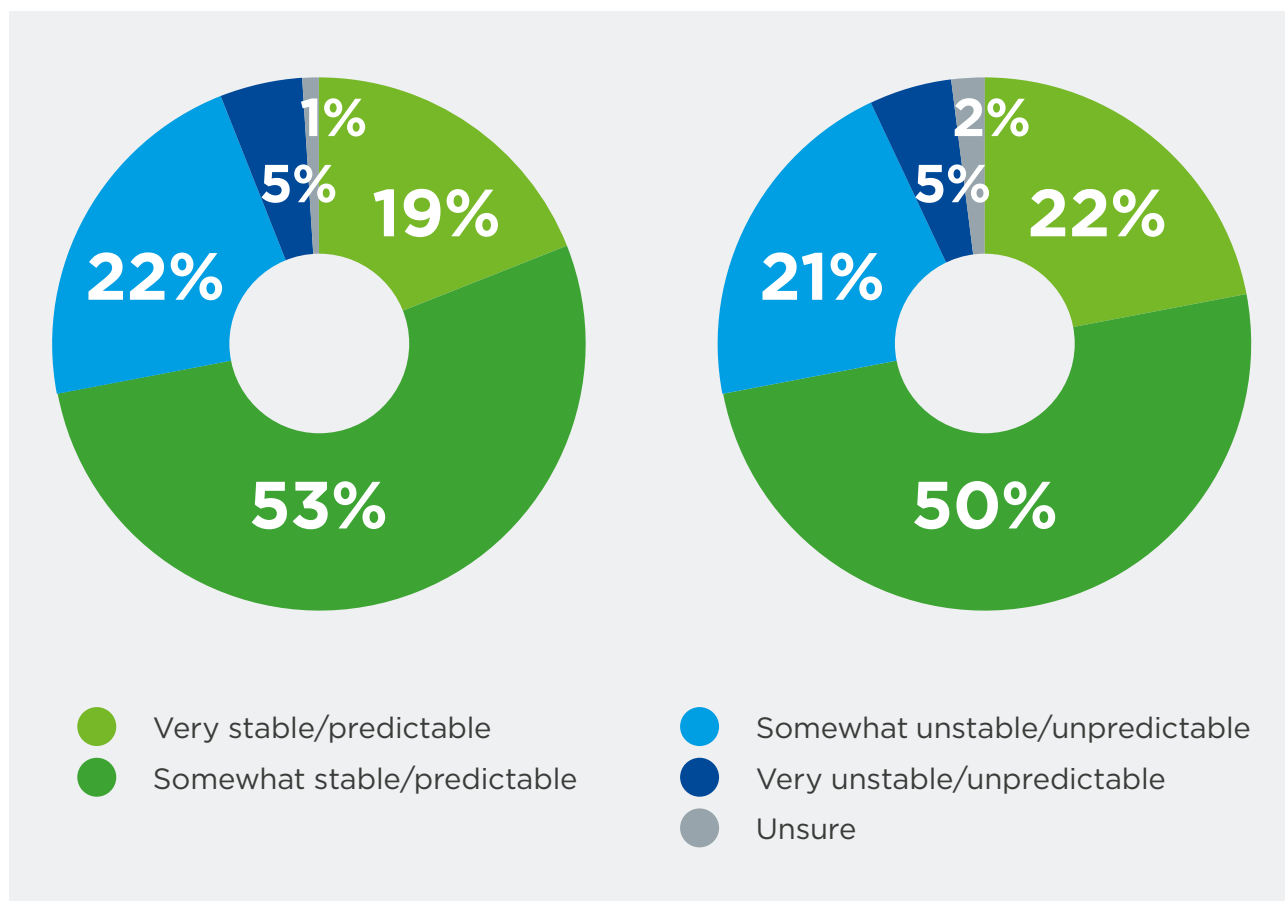
Meanwhile, as indicated in **Figures 38 and 39**, a strong majority of these respondents perceive limited volatility when it comes to the size or sources of their budget funds.

Figure 38

Overall, how stable is the size of the budget you are responsible for?
(n=1399)

Figure 39

Overall, how stable are the funding sources for the budget you are responsible for? (n=1404)



In terms of perceptions by role, ‘faculty/academic staff’ respondents were those most inclined to feel that the sources of their funds are ‘somewhat unstable/unpredictable’ or ‘very unstable/unpredictable’ (38%), followed by those holding ‘professional staff/director’ roles (32%). In terms of perceptions by type of budget, respondents responsible for budgets at the level of individual projects/programmes were most likely (29%) to consider the sources of these funds as somewhat or very unstable, whilst conversely, those responsible for budgets for their entire institution/organisation were the most likely to perceive strong budget source stability (28%). Some variation across regions was perceived, with higher percentages of respondents noting unstable/unpredictable funding sources in Northern Europe (29%) and Eastern and Southern Europe (28%) than in Western Europe (23%) and Western Asia (22%).

When it comes to budgetary resources, one could argue that 'more is always better.' But what exactly would those who have budgetary responsibilities do with a significant infusion of financial support?

When prompted to consider this idea, the largest percentage of respondents (34%) in some way indicated that they would focus on adding additional staff or providing more opportunities for existing staff, including training, higher pay/compensation, and other activities geared towards retention and staff happiness. Smaller percentages of respondents indicated they would focus significant additional funding on specific internationalisation-related projects (for example, related to collaborative online international learning, *ie* COIL, activities), and general scholarships or similar support for students and staff (23%); training opportunities (17%), notably intercultural training for students to cultivate interest in internationalisation activities; and student recruitment to support internationalisation efforts, including more focus on students who are less advantaged (17%).

SECTION 4

NATIONAL AND EUROPEAN-LEVEL DYNAMICS

SECTION HIGHLIGHTS

- A majority of respondents saw national and European-level authorities as either ‘highly influential’ or ‘influential’ when it comes to being drivers of their institution’s goals for internationalisation. However, a look back at past EAIE Barometer data indicates that the influence of both national and European-level actors may be waning.
- When asked about the effects from national policies, programmes or initiatives specifically on institution’s internationalisation *activities* (apart from the process of driving internationalisation *goals*), 41% of respondents indicated a positive effect.
- Looking at the statement “My institution encourages its staff to create blended intensive programmes with partners”, just over half (51%) of respondents indicated (strong) agreement, whilst 76% of those specifically holding ‘other leadership’ roles expressed (strong) agreement.
- 79% of respondents from Western Asia (strongly) agreed that EU initiatives in recognition have made recognition procedures more efficient and transparent at their institution, whilst just 36% of respondents in Northern Europe and 38% of those from Western Europe (strongly) agreed.
- When asked how to characterise the effect of the European Universities Initiative on their institution’s internationalisation activities, a solid percentage of respondents (43%) perceived positive effects, with a miniscule proportion (1%) noting negative effects.

Whilst the scope, direction and dynamics of internationalisation within higher education institutions may be driven to a significant degree by internal stakeholders and institution-specific priorities, external actors and forces may also exert influences. In the European context, it can be relevant to consider how professionals in international higher education view the influence of both national policies and interests as well as European Union programmes and instruments. These entities – and the funding they are often in a position to allocate – are in a privileged position to set critical ‘framework conditions’ for the

work related to internationalisation undertaken by higher education institutions and the ‘frontline’ professionals who staff them. Understanding more about how stakeholders working in the field of international higher education perceive the influence of these actors can open the door on important conversations about the intersection – or disconnects – between policy and practice.

INFLUENCE OF NATIONAL AND EUROPEAN-LEVEL AUTHORITIES

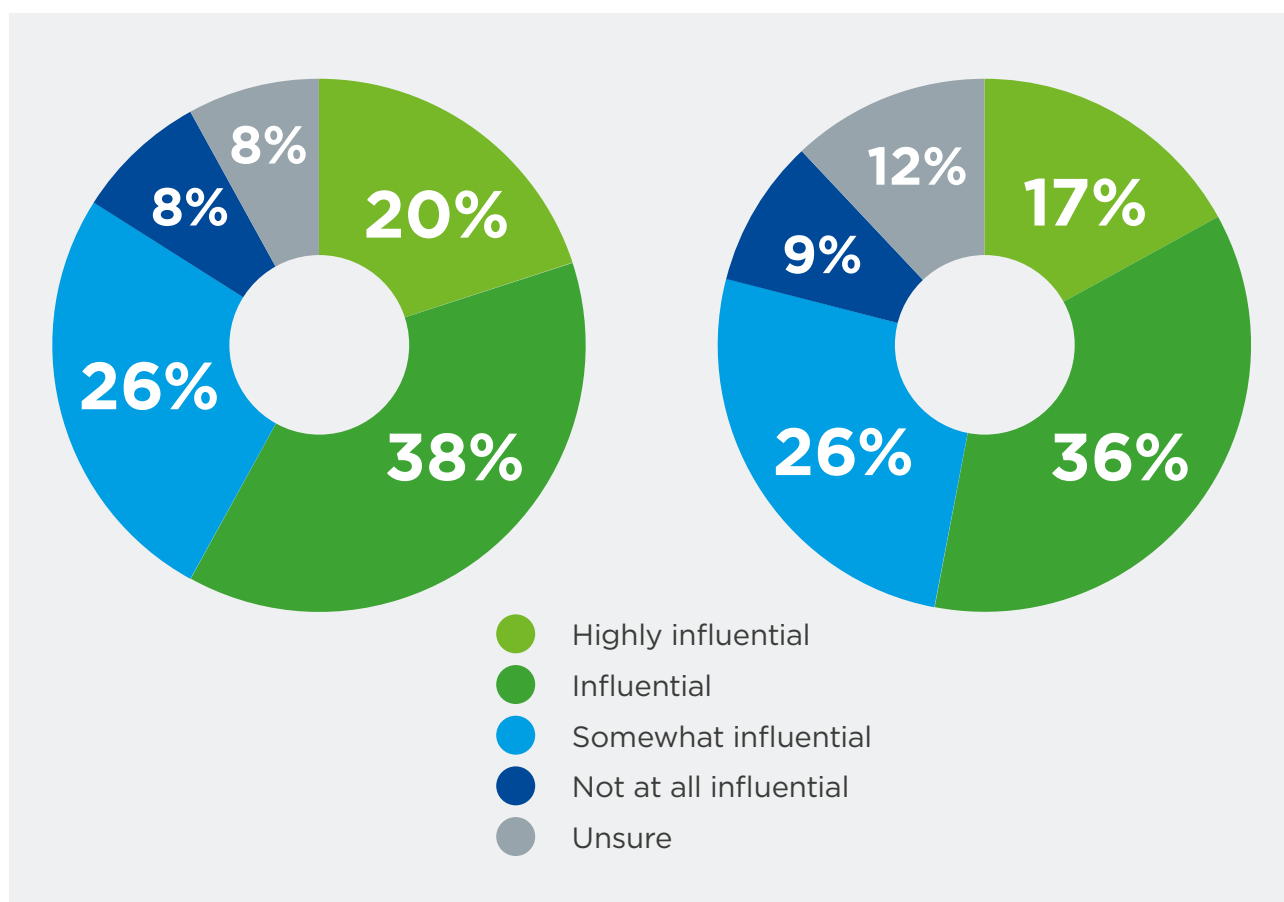
Overall, the EAIE Barometer data shows that a majority of respondents see national and European-level authorities as either ‘highly influential’ or ‘influential’ when it comes to being drivers of their institution’s goals for internationalisation (see **Figures 40 and 41**)

Figure 40

How would you characterise the influence of national authorities in driving your institution’s internationalisation goals? (n=1924)

Figure 41

How would you characterise the influence of European-level authorities in driving your institution’s internationalisation goals? (n=1924)



However, a look back at past EAIE Barometer data indicates that the influence of both national and European-level actors may be waning.

In the first iteration of the EAIE Barometer in 2015, respondents provided indications about the influence of different policy levels on institutional internationalisation policy, which can be seen as a parallel line of inquiry to the current Barometer's question about the influence of these actors in driving institutional goals. The results from the 2015 exercise indicated that 68% of respondents felt that the national policy level exerted a strong or relatively strong influence on their institution's internationalisation policy (as opposed to 58% in 2023), and 66% perceived the same regarding EU-level influence (as compared to 53% in 2023). Additionally, in 2015 just 2% of respondents felt that the national policy level had no influence (as opposed to 8% in 2023) and 3% felt EU-level policy had no influence (as compared to 9% in 2023).

These are notable differences in the perceived influence of national and European-level influences between 2015 and 2023. Of course, EHEA-wide findings mask real differences in perceptions in distinct national contexts. For example, just 11% of respondents from Ukraine consider national authorities to be highly influential, whilst a much larger percentage (27%) see European-level authorities as highly influential. Respondents' sense that European-level authorities are significantly more influential than national authorities is also apparent in the data from such countries as Armenia, Poland, Serbia and Slovakia.

Elsewhere, the script is flipped, with the influence of national authorities more frequently perceived by respondents as highly influential than that of European-level authorities. Countries such as Denmark, the Netherlands and Norway exemplify this dynamic.

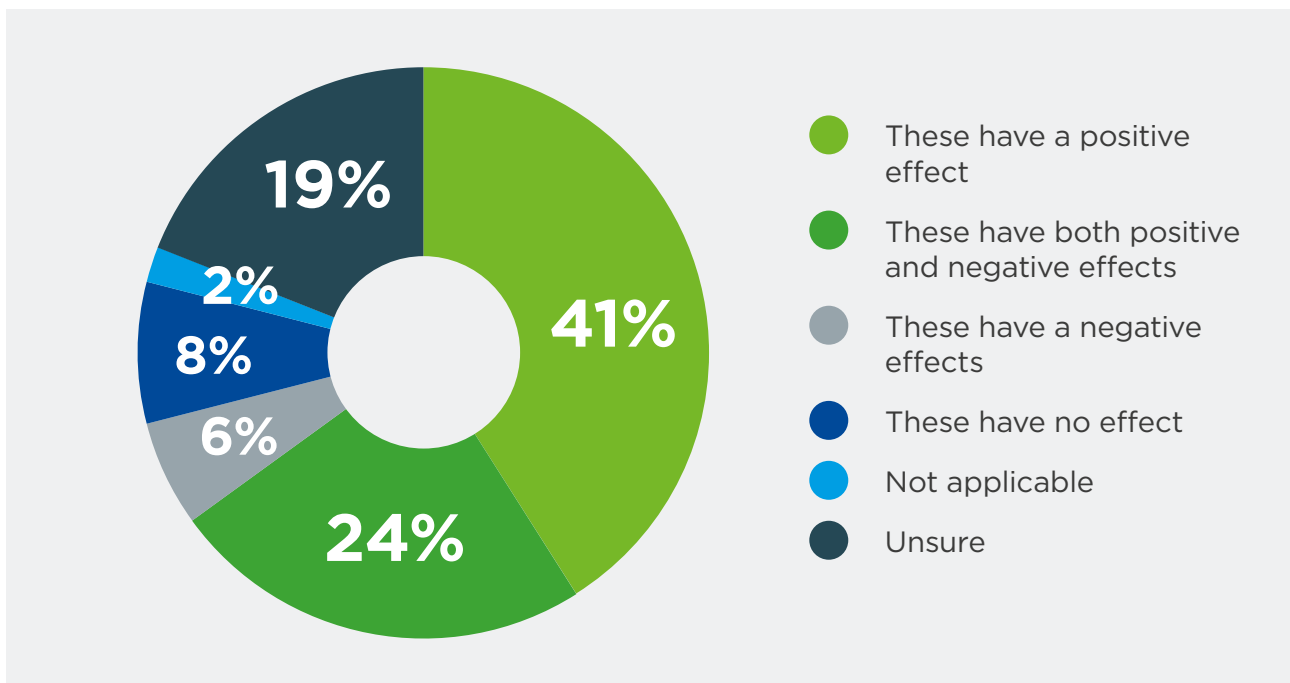
And, of course, there are countries where similar numbers of respondents feel that *both* national and European-level authorities wield 'high influence' over their institution's internationalisation goals. Such is the case, for example, for Czechia, Hungary, Portugal and Romania. Finally, rare is the country whose respondents indicated in significant percentages that both national and European-level authorities are 'not at all influential' over their institution's internationalisation goals. One standout example of this perception, however, is Croatia.

EFFECTS OF NATIONAL POLICIES/PROGRAMMES/INITIATIVES

In addition to seeking to understand how national authorities might be perceived as influential drivers (or not) of institutions' internationalisation goals, the Barometer survey also asked respondents to reflect on the *types* of effects that they see from national policies, programmes or initiatives on their institution's internationalisation activities. As seen in **Figure 42**, a solid proportion (41%) note positive effects.

Figure 42

How would you characterise the effect of national policies/programmes/initiatives on your institution's activities? (n=1879)



In comparison, it is interesting to note that in the second edition of the EAIE Barometer (2018), 51% of respondents felt that national policies, programmes or initiatives exerted positive effects on internationalisation at their institutions, 21% felt this impact was neutral and 10% perceived negative effects from national policies. Given the slightly different phrasings of the question and answer options between the second and third editions of the Barometer, this data cannot be compared directly. However, the slight drop from the previous Barometer to the current in terms of percentage of respondents indicating negative effects from national policies and programmes may be worth exploring further.

Likewise, the notable combined total percentages of respondents (*ie* 51%) who today see mixed effects, no effects, or who are unsure of any effects from national initiatives, also raises key questions about national policy relevance and implementation dynamics in many quarters.

Here, too, responses per country paint a more variable picture than the full data set. For example, as compared to the overall average, much smaller percentages of respondents from the Netherlands (16%), the United Kingdom (20%) and Denmark (20%) report seeing positive effects from national policies or initiatives. Unsurprisingly, these countries were also the leaders when it comes to percentages of respondents seeing negative effects of national-level policies or programmes, with 14% of UK respondents, 28% of Dutch respondents and 34% of Danish respondents selecting this answer option.

Amongst the countries where high percentages of respondents perceive positive effects from national policies, Romania (76%) and Czechia (63%) stand out, with a similar trend visible in the (admittedly sparse) data from Albania, Azerbaijan, Georgia, Liechtenstein and the Russian Federation.

A sense of national policies and programmes as offering *both* positive *and* negative effects was most widely reported by respondents from Finland (33%), the Netherlands (35%), Ireland and Norway (35% each), and the United Kingdom (44%). This also held true for Estonia and Luxembourg, although with much smaller numbers of total respondents.

When asked to expand on the most important effects (positive or negative) exerted by national policies, programmes or initiatives, the largest percentage of respondents (37%) cited the positive effects that come with financial support at the national level. Funding mechanisms and grants, *etc*, for students and programmes were indicated as having the greatest positive impact, particularly for countries and institutions that are not involved in Erasmus+ but have national programmes to provide such support.

A much smaller percentage (12%) flagged negative effects related to a drop in funding for global mobility, which respondents felt may be perceived as “less interesting” or the focus of fewer opportunities in the wake of the COVID-19 pandemic. Another small percentage of respondents (11%) pointed to the phenomenon of unintended consequences, citing the effects of policies that are not even focused on internationalisation but nonetheless exert negative consequences for higher education institutions. Respondents’ perspectives in these areas seem to align fairly closely with the results from the second edition of the EAIE Barometer (2018), whereby “At the national level, national agencies and financial support for internationalisation were the most positively viewed regulations, policies and structures, whilst immigration and admissions regulations were perceived comparatively negatively” (p. 35).

EUROPEAN UNION PRIORITIES AND PROGRAMMES

The European Union's (EU) significant role in influencing developments and directions in international higher education across Europe is well established. Indeed, in 2018 the EAIE Barometer (second edition) found that there was an “overwhelming positive effect” associated with Erasmus+ and that, “despite its challenges, the Erasmus+ programme is seen to support internationalisation both within and beyond the EU member states” (p. 31). Against this backdrop, and also in light of recent extensive Erasmus+ 2021-2027 mid-term evaluation activities taking place by a variety of stakeholders, the current third edition of the EAIE Barometer survey sought to tease out respondents' current perceptions about their individual and/or institutional experience with various aspects of the Erasmus+ programme, as well as indications of how their institution has engaged with or been affected by other priorities or opportunities emanating from the European Commission.

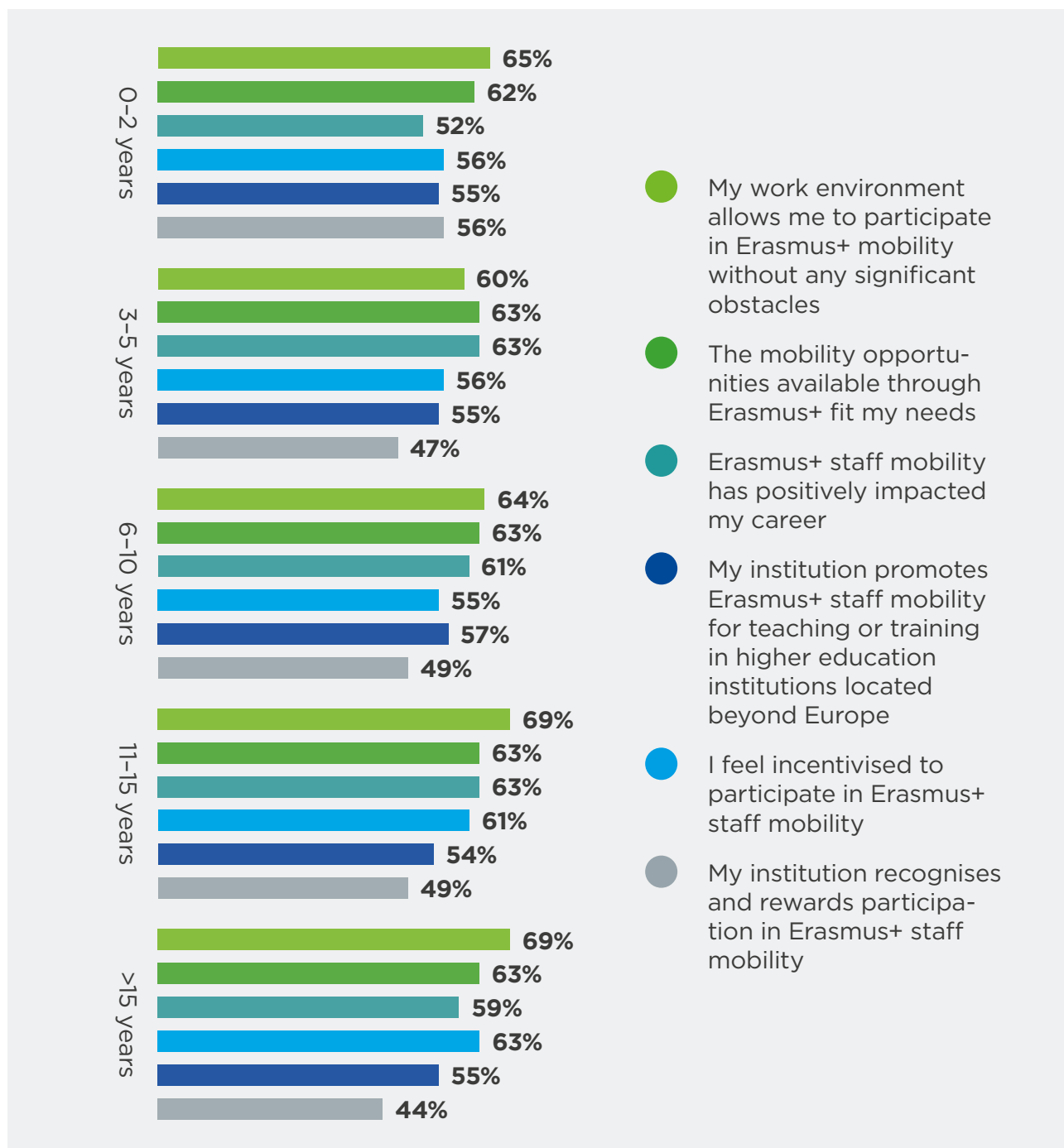
In considering this data, it may be interesting to recall from the Respondents section of this report that more respondents indicated that their work is specifically linked to ‘European-funded programmes’ (as opposed to other functional areas such as ‘student and staff mobility’; ‘teaching, learning and curriculum’; ‘leadership, strategy and policy’ etc) in Eastern Europe (53%), Southern Europe (49%) and Western Asia (59%) than in Northern (32%) and Western Europe (37%).

On the subject of Erasmus+ opportunities for staff, respondents were asked to consider their levels of agreement with six statements. As seen through the lens of respondents' years of experience (see **Figure 43**), a majority (or near majority) indicate that they ‘agree’ or ‘strongly agree’ with these statements, ranging from Erasmus+ staff opportunities' fit to their needs, to positive effects on their careers, to accessibility to these opportunities without significant obstacles in their work environment, amongst other variables.

Across the board, however, the item on which there is the strongest level of *disagreement* is “My institution recognises and rewards participation in Erasmus+ staff mobility.” Overall, only 48% ‘agree’ or ‘strongly agree’ that this is the case, whereas the overall proportion of respondents in agreement with the other statements in **Figure 43** ranges from 55% to 66%.

Figure 43

Erasmus+ opportunities for staff, by years of experience in the field (% strongly agree + agree) (n=1805)*

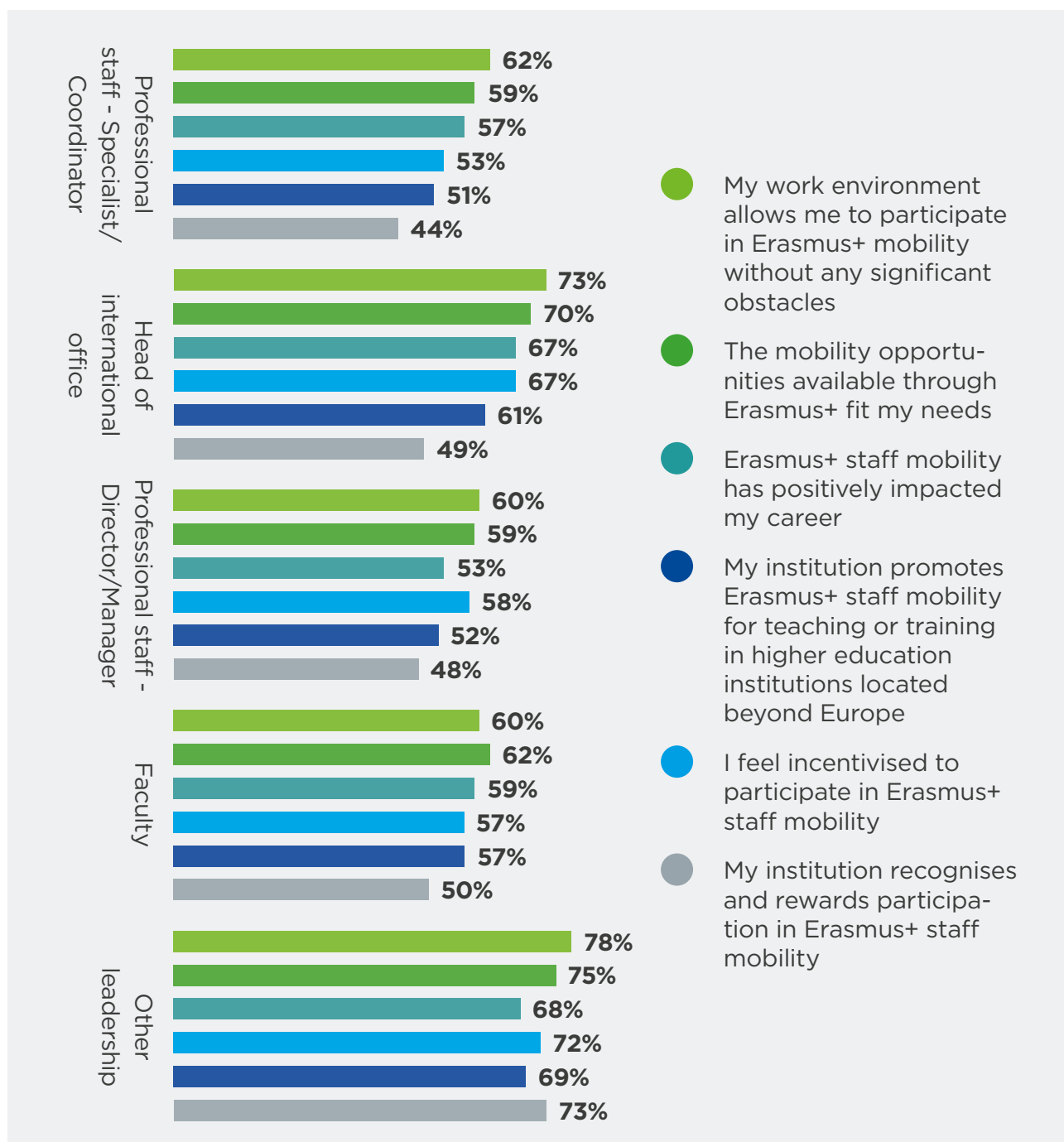


* Note: After consultation with country experts, data from Switzerland and the United Kingdom was excluded from this analysis, given that these countries do not participate in the Erasmus+ programme.

When factoring in the position held by respondents, a key insight emerges in that individuals in ‘other leadership’ roles are more apt to agree that the institution recognises and rewards Erasmus+ staff mobility participation as compared with the 44–50% of individuals with other roles (see **Figure 44**). This shows a disconnect between these stakeholders.

Figure 44

Erasmus+ opportunities for staff, by position (% strongly agree + agree) (n=1805)*

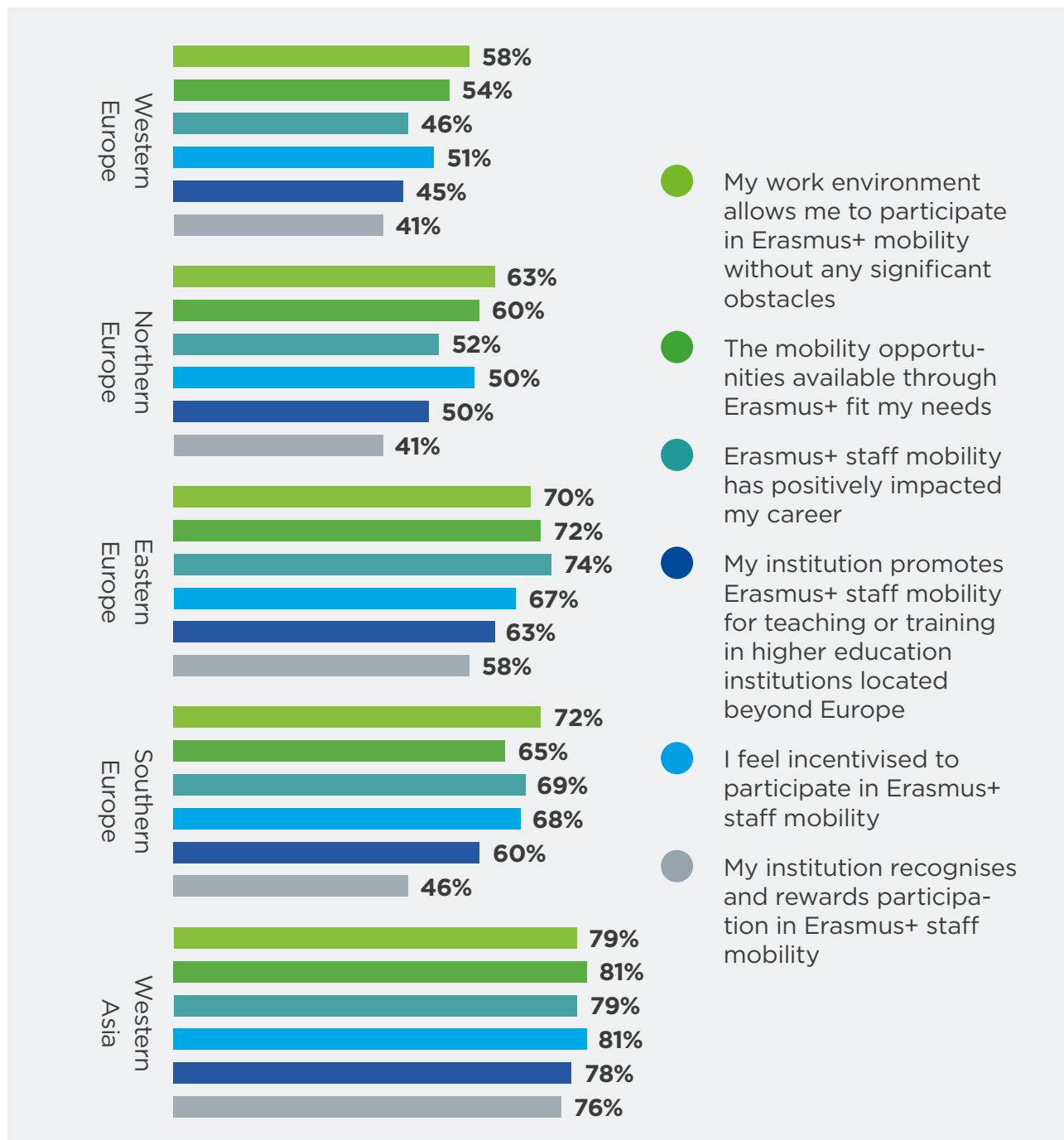


* Note: After consultation with country experts, data from Switzerland and the United Kingdom was excluded from this analysis, given that these countries do not participate in the Erasmus+ programme.

Finally, **Figure 45** provides an indication of how Erasmus+ opportunities for staff are perceived by respondents in different regions within the EHEA.

Figure 45

Erasmus+ opportunities for staff, by region (% strongly agree + agree) (n=1805)*



* Note: After consultation with country experts, data from Switzerland and the United Kingdom was excluded from this analysis, given that these countries do not participate in the Erasmus+ programme.

This data offers a clear indication that larger proportions of respondents in Western Asia have positive associations with the programme and the way respondents' institutions relate to it, with a much less positive perspective emerging from the responses gathered from Western and Northern Europe. There are further insights to be gained in relation to country-specific responses. For example, respondents from Croatia, Portugal and Romania registered very positive reactions to statements about the Erasmus+ staff opportunities, whilst there are more signs of disagreement with these statements in countries such as Ireland and Italy.

Beyond Erasmus+ opportunities directed specifically at staff, there are of course other priority areas of interest to the European Commission that may have a bearing on internationalisation activities and choices at the institutional level. For example, respondents were asked to express levels of agreement with statements regarding their institution's promotion of Erasmus+ cooperation opportunities with higher education institutions located both *within* and *beyond Europe*. A clear focus on intra-European engagement emerged here, with 86% indicating (strong) agreement that their institutions are promoting such cooperation within Europe and significantly fewer (66%) registering (strong) agreement that their institutions are promoting cooperation with HEIs beyond Europe. The same kinds of results were seen with respect to the promotion of student mobility for study or traineeships within and beyond Europe.

The uptake within the Erasmus+ programme of blended intensive programmes (BIPs) – defined by the European Commission as “short, intensive programmes that use innovative ways of learning and teaching, including the use of online cooperation” (European Commission, 2023, n.p.) – has been another issue of interest in recent years. In reaction to the statement “My institution encourages its staff to create blended intensive programmes with partners”, just over half (51%) of all Barometer respondents indicated (strong) agreement, although (76%) of those specifically holding ‘other leadership’ roles expressed (strong) agreement. National variations are also apparent in the data, with (strong) agreement that their institutions are encouraging staff to create BIPs seen in the responses from Armenia (85%), Azerbaijan (83%), Romania (79%) and Slovakia (74%) and notable percentages registering disagreement with this statement in the Netherlands (24%), Sweden (26%), France (29%) and – prominently, in Denmark (53%).

Another topic of particular interest to the Commission is whether EU initiatives in recognition have made recognition procedures at institutions more efficient and transparent. Here, recognition was defined as “Automatic mutual recognition of qualifications issued by other Member States and/or recognition of learning outcomes of periods abroad.” On this issue, clear regional differences were visible in the data: 79% of respondents from Western Asia (strongly) agreed that EU initiatives in recognition have

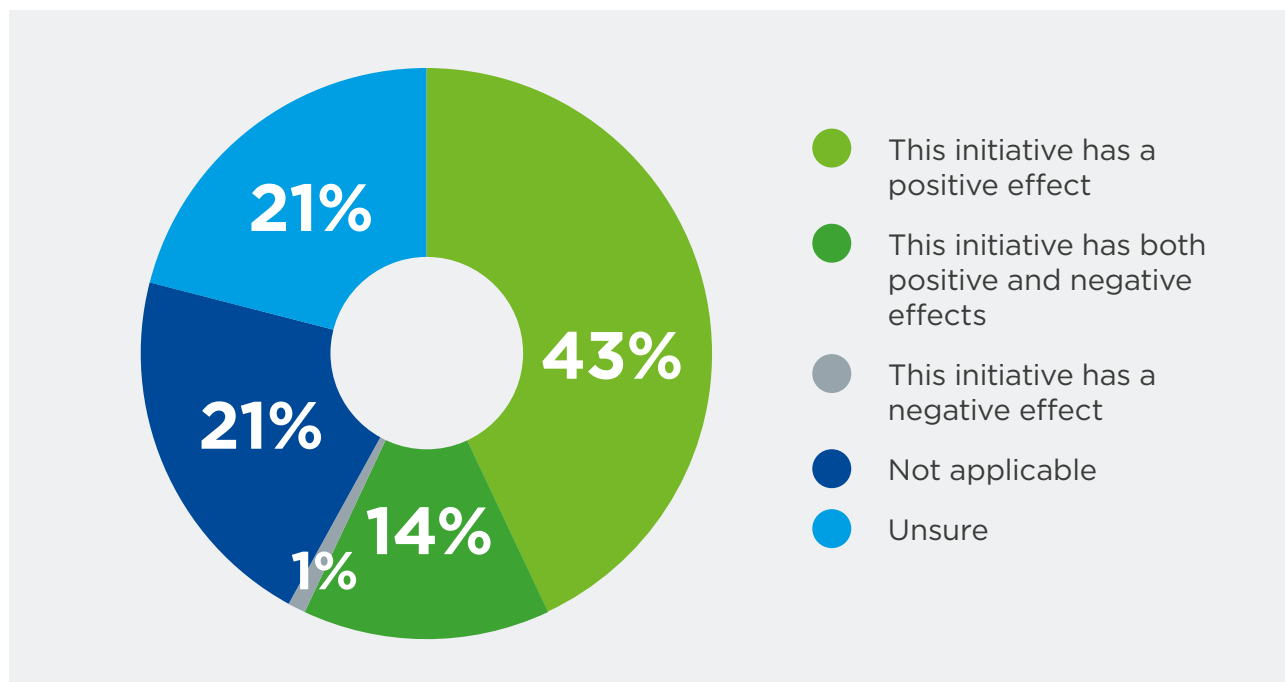
made recognition procedures more efficient and transparent at their institution, whilst just 36% of respondents in Northern Europe and 38% of those from Western Europe (strongly) agreed. The perception of (strong) agreement on this point from respondents in Southern Europe (67%) and Eastern Europe (63%) fell somewhere between the other regions' results.

Finally, one of the most prominent examples of the interest of the European Commission in international higher education today can be seen in the European Universities Initiative, the highly ambitious effort to cultivate “transnational alliances of higher education institutions, paving the way towards the universities of the future” (European Commission, n.d., n.p.).

Figure 46 provides an indication of a solid percentage of respondents (43%) perceiving that this initiative has had positive effects on their institution, with a miniscule proportion (1%) noting negative effects.

Figure 46

How would you characterise the effect of the European Universities Initiative on your institution's internationalisation activities? (n=1833)



There are notable differences in experience across different respondent profiles, however. Perhaps unsurprisingly, a sizable proportion of specialised institutions (39%) figure amongst the 'Not applicable' answers, which speaks to the initiative's focus on universities. The countries with the highest percentages of respondents saying their institution is not involved in an alliance are Denmark (31%), Germany (34%) and Poland (36%), which in turn aligns with the regional finding that Western Europe is the region whose respondents most frequently report (26%) that their institution is not involved in an alliance.

Interestingly, there seems to be something of a relationship between size of institution and perception of effects: just 36% of those from institutions with 5000 or fewer students report seeing a positive effect. This compares notably to the positive effects seen by respondents from all larger-sized institutions, including up to 49% at institutions enrolling more than 20,000 students.

When it comes to perceptions about the European University alliances on the basis of professional role, there are also some clear differences. For example, a solid majority of those holding 'other leadership' roles see positive effects of the initiative, as compared to 39% of those holding a role of 'professional staff – director or manager or equivalent'. Respondents who identify as 'faculty member/academic staff or equivalent' are (at 38%) more prone than the average respondent to indicate that they are 'unsure' of the effects of the initiative.

The countries with the highest percentages of respondents noting a positive effect are Slovenia (80%), Romania (73%), Armenia (62%) and Serbia (60%), whilst Ireland is the country with the highest percentage (6%) indicating a negative effect. At a regional level, Western Asia registers the highest percentage of respondents indicating a positive effect (57%), followed closely by Eastern and Southern Europe. Western and Northern Europe score highest out of the regions (17%) when it comes to reporting both positive and negative effects from involvement in a European University alliance.

SECTION 5

PERCEPTIONS ABOUT IMPACT

SECTION HIGHLIGHTS

- A solid 63% of respondents to the Barometer survey indicated some level of urgency around ‘the debate or discussion about the impact of internationalisation’ at their institution or organisation. At the same time, it is notable that nearly one third of respondents perceived there is no such debate or discussion, or that there is no urgency in relation to it.
- Just under half of all respondents (47%) reported feeling ‘significant’ or ‘very significant’ pressure in their roles when it comes to demonstrating the impact of internationalisation.
- The most common sources of pressure to demonstrate impact reported by respondents were the leadership from within their own institutions or organisations, followed by national governments or national higher education authorities.
- Respondents perceived that their institution/organisation is most concerned with delivering impact from its internationalisation activities through results linked to reputation or rankings, although closely followed by student learning outcomes and research activity.

The EAIE is guided by the notion that international higher education has the power to create a better world through its ability to connect diverse perspectives and foster greater understanding. Notably, the EAIE is not alone in asserting the significant transformational potential of internationalisation, whether at the level of individuals, organisations and/or societies more broadly (see, for example, Brandenburg *et al*, 2020; International Association of Universities, n.d.; NAFSA, 2024). Yet many questions and uncertainties surround the matter of ‘impact’ in relation to internationalisation.

Without necessarily defining the precise nature of impact for respondents, the present third edition of the EAIE Barometer nonetheless sought to gain insight into how professionals working in international higher education across the European Higher Education Area perceive the conversation about impact at their institutions and

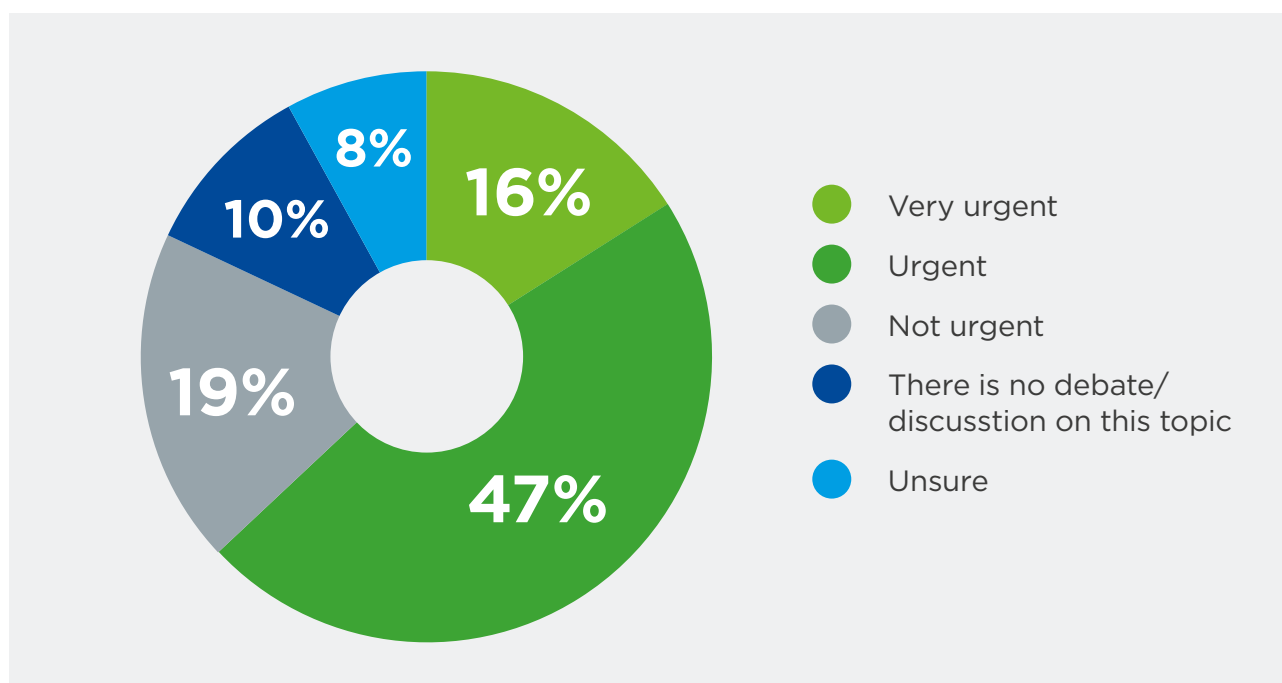
organisations. Their perspectives on such issues as what kinds of impact are most valued by their institutions, which stakeholders are most invested in questions of impact and the general level of urgency about demonstrating impact, provide important indications of the priorities and preoccupations driving engagement with internationalisation today.

URGENCY AND PRESSURE TO PRODUCE EVIDENCE OF IMPACT

A solid 63% of respondents to the Barometer survey indicated some level of urgency around ‘the debate or discussion about the impact of internationalisation’ at their institution or organisation (see **Figure 47**). At the same time, it is notable that nearly one third of respondents perceived there is no such debate or discussion, or that there is no urgency in relation to it.

Figure 47

How would you characterise the debate or discussion about the impact of internationalisation at your institution/organisation? (n=2159)



Individuals holding ‘other leadership’ roles were more inclined (at 24%) to see this discussion about impact at their institutions as ‘very urgent’, as compared to those indicating they work at the level of ‘professional staff – specialist/coordinator’ (15%), ‘head of international office’ (15%), ‘professional staff – director/manager’ (17%) or ‘faculty member/academic staff or equivalent’ (16%).

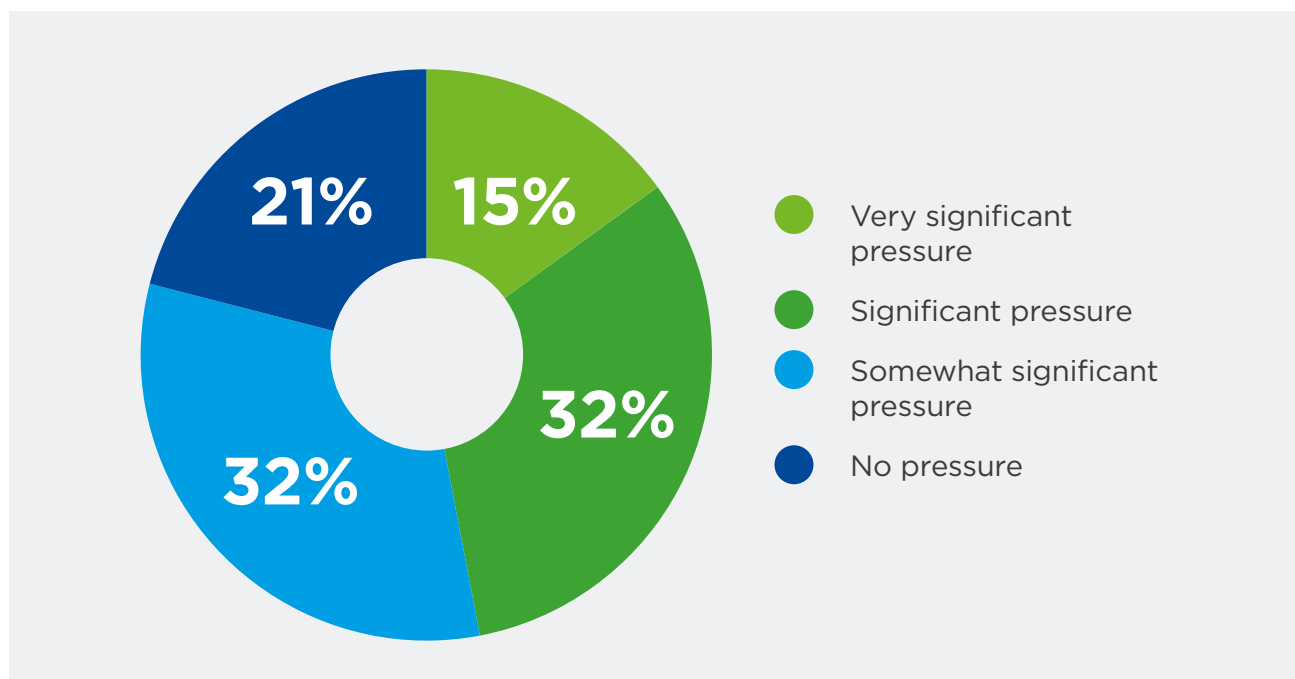
Across regions and countries, there were discernible variations in this picture, of course. At 70%, respondents from Western Asia were most likely to indicate that the debate or discussion at their institution/organisation is ‘very urgent’ or ‘urgent’, whilst 56% of respondents from Northern Europe indicated this was the case in their contexts. At the national level, the highest percentages of respondents indicating either ‘very urgent’ or ‘urgent’ debate/discussion about impact were seen in Armenia (73%), Spain (74%), Azerbaijan (79%) and Portugal (82%). The Netherlands, however, registered the highest percentage of respondents reporting that this issue is ‘very urgent,’ followed by Portugal (23%), Italy and Türkiye (22% each). Conversely, the countries with the highest proportions of individuals who reported that this debate/discussion is *not* urgent were Sweden (29%) and Norway (31%).

In addition to seeking insight into the question of urgency of institutional/organisational discussions about impact, the EAIE Barometer survey also sought information about the sense of pressure individual respondents feel to demonstrate impact in their roles, and the source of such pressure, if it exists.

As indicated in **Figure 48**, just under half of all respondents (47%) reported feeling ‘significant’ or ‘very significant’ pressure in their roles when it comes to demonstrating the impact of internationalisation.

Figure 48

How much pressure do you feel in your role to produce evidence of the impact of internationalisation? (n=2134)



Perhaps not surprisingly, individuals holding ‘other leadership’ roles most frequently reported experiencing ‘very significant pressure’ (24%), followed by those who serve as ‘head of international office’ (22%). Respondents who indicated they are a ‘faculty member/academic staff or equivalent’ report feeling ‘very significant pressure’ much less frequently (9%). In alignment with this result, ‘no pressure’ to produce evidence of the impact of internationalisation is indicated most frequently by ‘faculty member/academic staff or equivalent’ (30%) and ‘professional staff – specialist/coordinator’ (26%).

When viewed through the lens of financial responsibility, a similar picture emerges: those responsible for budgets for entire institutions/organisations most commonly reported feeling (very) significant pressure to produce evidence of impact in their roles (59%), as compared to those with no financial or budgetary responsibilities (28%).

In terms of national and regional dynamics, the countries where respondents most frequently indicated they felt ‘very significant’ pressure to produce evidence of impact in their roles were Lithuania (42%), Estonia (33%) and Georgia (31%) – although with relatively small numbers of total respondents – as well as Portugal (30%). Amongst the countries where the highest percentages of respondents reported ‘no pressure’, Serbia (42%), Slovenia (38%), Sweden (37%) and Norway (30%) stand out.

In asking respondents to indicate the sense of pressure they feel in their roles to demonstrate the impact of internationalisation, it is also relevant to consider the focal point of their work. For example, those who indicated that ‘marketing and admissions’ is the general focus of their work most frequently reported ‘very significant pressure’ (20%) to demonstrate impact, whilst those whose work is focused on ‘teaching, learning and curriculum’ least frequently reported ‘very significant pressure’ (11%).

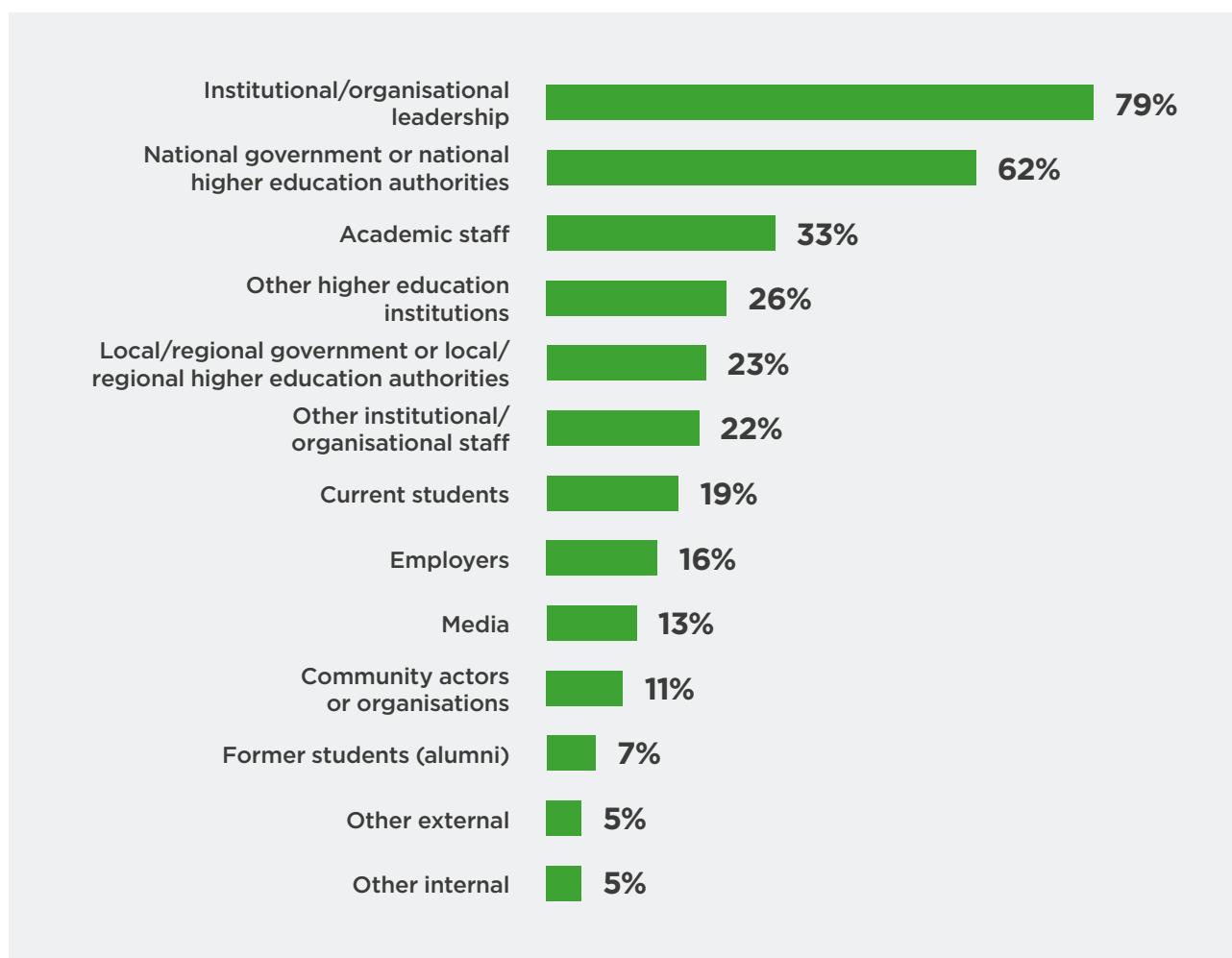
In terms of a longitudinal perspective on this question, it is somewhat difficult to assess how professionals’ perceptions have evolved (or not) in this area over time given that identical questions have not been asked over each iteration of the survey. Even still, it is notable that in the first iteration of the Barometer survey in 2015, when asked to indicate the top five challenges respondents were dealing with, ‘assessing the relevance and measuring impact of internationalisation activities’ was not selected as a top five issue for any of the respondent countries. Roughly ten years later, the fact that nearly 50% of EAIE Barometer (third edition) respondents indicate experiencing (very) significant pressure to produce evidence of impact establishes a thought-provoking baseline of understanding about this issue across the European Higher Education Area today.

SOURCES OF PRESSURE TO PRODUCE IMPACT

Far and away the most common sources of pressure to demonstrate impact reported by respondents are the leadership from within their own institutions or organisations, followed by national governments or national higher education authorities (see **Figure 49**).

Figure 49

**Where does the pressure to produce evidence of impact come from?
(select all that apply) (n=1690)**



Beneath that general picture, however, there are significant differences across national contexts when it comes to sources of pressure to produce evidence of impact of internationalisation. For example, when it comes to the pressure felt from institutional/organisational leadership, the United Kingdom stands out for the whopping 93% of respondents who reported this source as relevant. Pressure from the national government or national higher education authorities was most apparent in the responses from Norway (88%) and Finland (82%), whilst elsewhere the tendency to point to national-level pressure was much less prevalent, for example in Serbia (33%).

The differing roles of academic staff in pushing for evidence of the impact of internationalisation also shine through in the data, with respondents from Ukraine (48%), Türkiye (52%) and Azerbaijan (67%) much more frequently pointing to academic staff as sources of pressure than the average respondent. Interestingly, Ukraine (29%), Türkiye (33%) and Azerbaijan (38%) are also the three countries where ‘current students’ were most frequently cited as drivers in the push to produce evidence of impact from internationalisation. Indeed, it is interesting to note that in Western Asia overall ‘academic staff’ (50%) and ‘current students’ (36%) were considered much more important players as sources of pressure than is evidenced in other regions.

When it comes to seeing employers as sources of pressure, the results by country most typically range from 10% to 30%, but there are notable outliers in Austria (3%) and Switzerland (2%), where respondents cited pressure from employers much less frequently. Meanwhile, whilst pressure from the media is overall relatively infrequently noted by respondents, nearly one quarter of survey participants from the Netherlands and Türkiye (24%) do report pressure from this source.

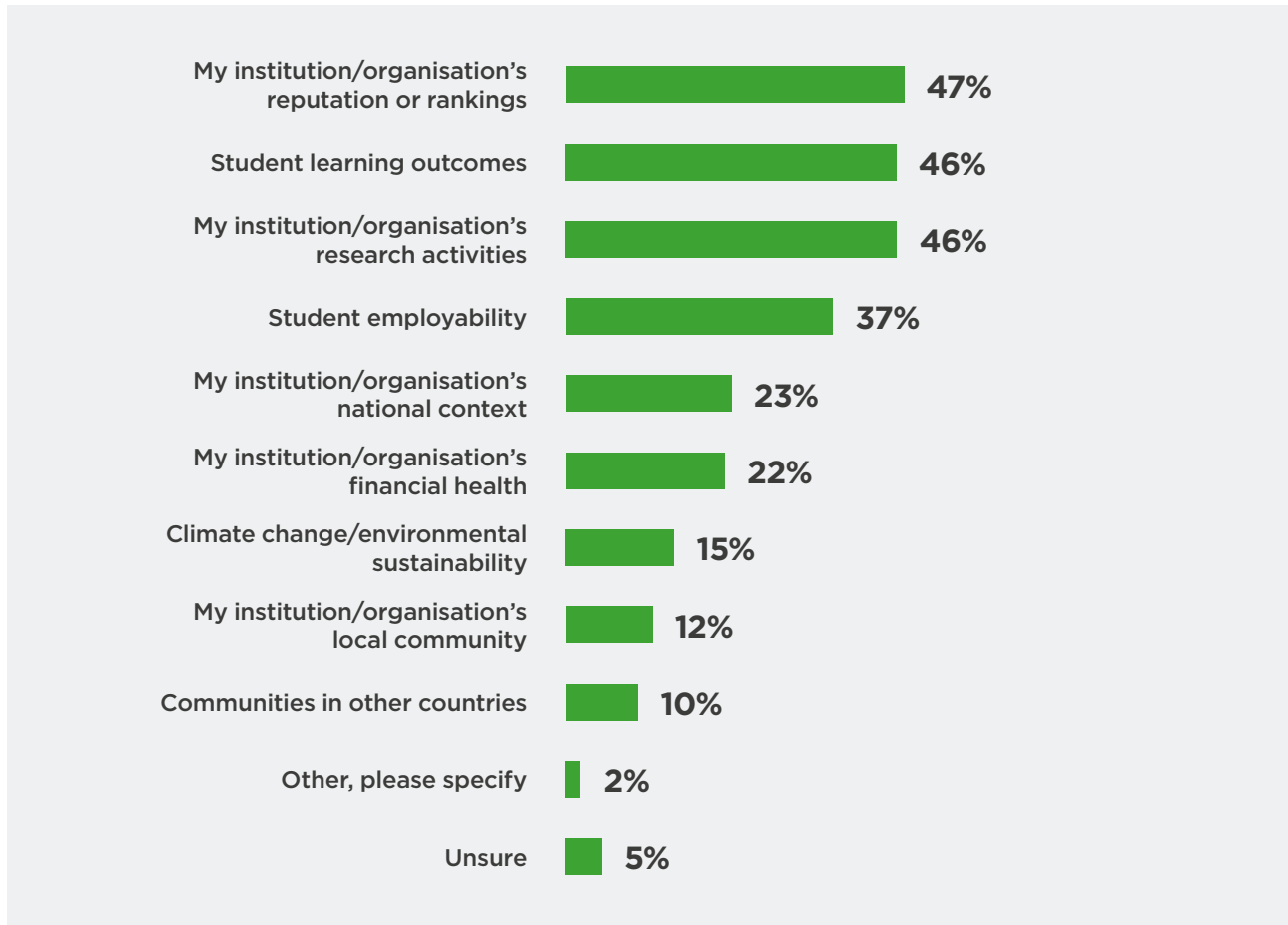
AREAS FOR DELIVERING IMPACT

Respondents were asked to select up to three different areas in which they perceive that their institution/organisation is most concerned with delivering impact from its internationalisation activities. Here, it is notable that impact in relation to reputation or rankings was pointed to as a top concern as frequently as the core higher education interests of student learning outcomes and research activity (see **Figure 50**). Also interesting is that more than one fifth of respondents (22%) perceived that financial health is a top-three consideration at their institution or organisation when it comes to demonstrating the impact of internationalisation. In comparison, the second edition of the EAIE Barometer (2018) found that just 12% of respondents identified ‘financial benefits’ as a main goal of internationalisation for their institution.

Figure 50

In which areas is your institution/organisation most concerned with delivering impact from its internationalisation activities?

(select up to three) (n=2135)



A closer look at the data from the perspective of respondents' roles, the type of institutions they work for and the countries in which they work provides further interesting insights.

For example, 57% of respondents working at specialised institutions indicated that 'reputation or rankings' is a top-three concern at their institution with respect to delivering impact from internationalisation, in close alignment with respondents from research universities (55%). A notably small percentage of respondents working at universities of applied sciences (36%) indicated 'reputation or rankings' as a top-three concern at their institution when it comes to delivering impact.

Across all job profiles, those working as 'head of international office or equivalent' most frequently (55%) indicated that their institution considers reputation/rankings a top

consideration in relation to the delivery of impact from internationalisation, with the smallest percentage flagging this impact priority seen in the responses from those who work as 'professional staff – specialist or coordinator or equivalent' (45%) – even still, a considerable proportion.

Those with 'faculty member/academic staff or equivalent' roles were most inclined to say their institutions are concerned with delivering impact on internationalisation via research activities (49%), whilst the individuals who identify as 'professional staff – director/manager' were the group that most frequently selected the 'financial health' option for this question (31%).

Country-specific data suggests some considerable differences in the ways that delivering impact on internationalisation is perceived across the EHEA. For example, much stronger percentages of respondents in Hungary (65%), Czechia (66%) and Italy (68%) pointed to reputation/rankings as a focus of impact from internationalisation, whilst just 19% of respondents in the Netherlands did so.

Meanwhile, the proportions of respondents who consider that their institution/organisation is concerned about internationalisation delivering impact in relation to 'climate change/environmental sustainability' ranged from 23% to 26% in Austria, Belgium, Finland, France and the Netherlands, to just 2% to 4% in Azerbaijan, Croatia and Czechia.

In all regions, 'reputation or rankings' was most frequently selected as a consideration in terms of delivering impact on internationalisation, except for in Western Europe, where the most frequently selected option to this question was 'student learning outcomes'.

When asked in an optional question to share how their institutions/organisations measure impact, some 685 respondents provided such details. The most common approach cited was the implementation of research or survey activities to gather feedback from relevant stakeholders or participants (23%), followed closely by the use of key performance indicators (KPIs), which may be decided at a programme level or institutional level, and are typically connected to a strategic plan. Smaller proportions of respondents suggested that impact was measured through student enrolment numbers (10%, reflecting the numbers of international and/or domestic students involved in internationalisation activities of different types); rankings performance (7%); financial markers such as income from fees (6%) and student employment outcomes (2%).

SECTION 6

TOPICS OF INTEREST

SECTION HIGHLIGHTS

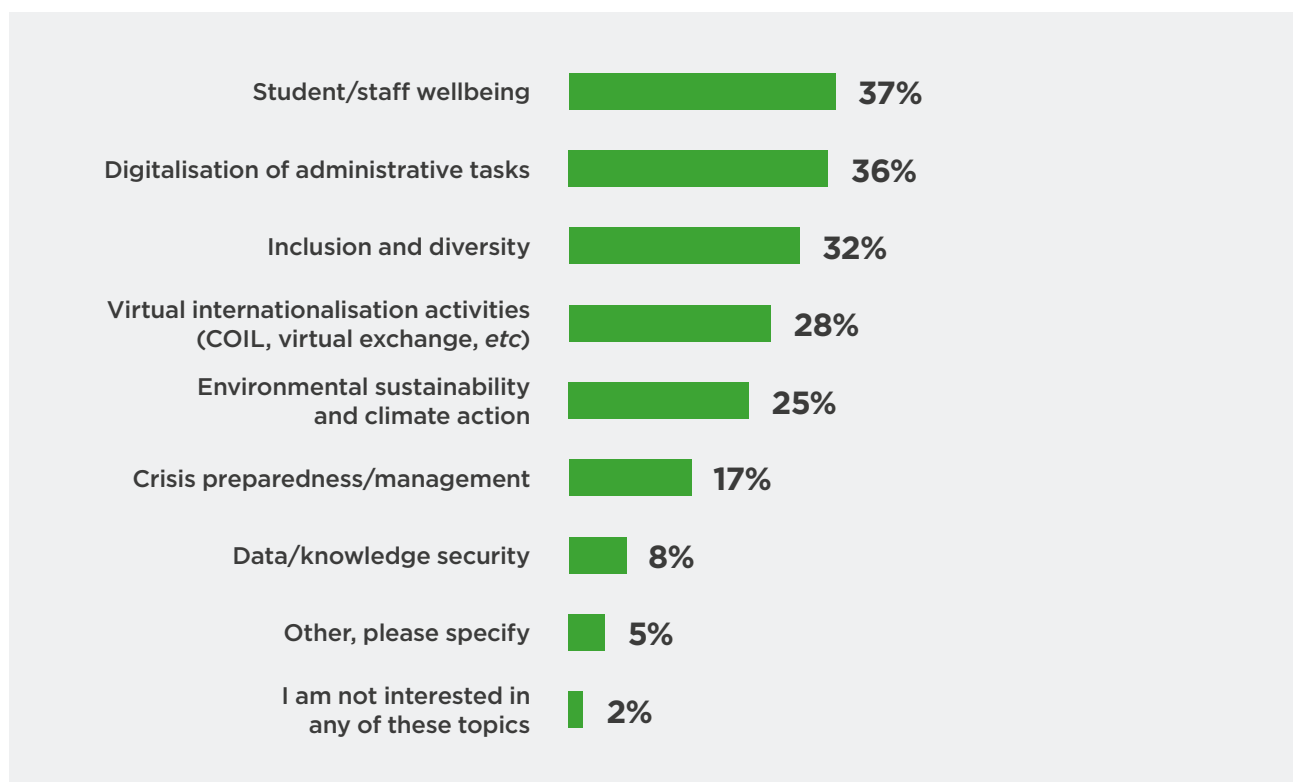
- The topics that were most frequently selected as being most personally or professionally interesting to respondents were ‘student/staff well-being’, ‘digitalisation of administrative tasks’, and ‘inclusion and diversity’, with only slight variations amongst different respondent groups.
- Respondents from Northern and Western Europe picked ‘inclusion and diversity’ and ‘environmental sustainability and climate action’ considerably more often as a topic of interest than those from other EHEA regions.
- A large percentage of respondents felt their institution/organisation has a clear plan for the activities it is pursuing in relation to ‘inclusion and diversity’.
- Overall, respondents interested in ‘virtual internationalisation’ were most negative about the way their institution/organisation deals with this topic, from planning to leadership to investment of financial resources.
- As a whole, the respondents interested in the topic of ‘data knowledge/security’ were quite positive about how their institution/organisation is doing in relation to this issue.
- Respondents were most commonly inclined to indicate that their institution/organisation was underperforming when it comes to providing sufficient financial and non-financial resources to support key topics of interest.
- When it comes to having made progress in the last 12 months, the results are quite positive. For most of the topics at least half of respondents felt progress has been made during this timeframe.

Beyond understanding how professionals across the EHEA feel about their institutions, their roles and the impact of national and European-level dynamics that frame their work, the current iteration of the EAIE Barometer also sought to gain insight into what these individuals think about specific topics and issues that are particularly relevant to the sector today. Previous Barometer reports focused on issues that were of particular interest at that moment in time, ranging from international strategic partnerships (Sandström & Weimer,

2016), to financial considerations in relation to internationalisation (Rumbley & Sandström, 2019), to indications of what successful internationalisation in Europe looks like (Sandström & Hudson, 2019). Based on information collected via a number of extensive environmental scanning exercises in 2023, a list of popular topics was developed and included in the current Barometer survey. Respondents were invited to select up to two topic areas of personal or professional interest to them. The aspiration here was to gain insight into these key topics from professionals who really care about them.

Figure 51

From the list below, please select up to two topic areas that are particularly interesting to you personally and/or professionally. (n=2092)



As can be seen in **Figure 51**, over 2000 respondents gave an answer to this question, with three topics each being selected by more than 30% of respondents as being of personal or professional interest: ‘student/staff well-being’, ‘digitalisation of administrative tasks’, and ‘inclusion and diversity’. The relatively low percentages per topic choice visible in **Figure 51** can be attributed to the fact that respondents could choose no more than two topics from a list of seven. The spread of responses across the answer options may also provide evidence that there is no one ‘runaway’ topic that is dominating the interests of international higher education professionals across Europe.

A look at the data through the lens of several key variables provides some interesting insights. For example, when taking a closer look at the different types of institutions/organisations respondents work for, the leading topic of 'student/staff well-being' was the first choice for research universities, universities of applied sciences and specialised institutions. However, the ministries/government agencies did not find this topic as important (18%), more frequently choosing instead 'digitalisation of administrative tasks' (41%). NGOs, on the other hand, were particularly interested in 'inclusion and diversity' (43%).

This slight variety amongst respondent groups was also visible when looking at the years of experience. Staff with zero to five years' experience within the international higher education field chose 'student/staff well-being' as their most important topic. Staff with more than five years' experience more often indicated 'digitalisation of administrative tasks' was particularly interesting to them. Whilst it is only a one to two percent difference between these groups, it is still notable and can indicate what is on the minds of these professionals with different levels of experience in the sector.

When looking more closely at the positions of respondents, it is most striking that 50% of respondents identifying as 'faculty/academic staff' indicated 'student/staff well-being' as the topic that is most interesting to them, whilst, for example, heads of international offices went with 'digitalisation of administrative tasks' as their top choice (43%). Once again, small but noteworthy variations.

The regional picture (see **Figure 52**) shows a largely similar overview, with a few interesting variations in topic choice. Whilst ‘student/staff well-being’ and ‘digitalisation of administrative tasks’ were often chosen by respondents from all regions, ‘inclusion and diversity’ was most often chosen as a topic of personal and professional interest in Western and Northern Europe. ‘Environmental sustainability and climate action’ follows a similar trend, with much higher percentages of respondents indicating interest in this area in Western (31%) and Northern Europe (26%) than the other regions. Respondents in Eastern and Southern Europe instead paid more attention to ‘virtual internationalisation activities’, as this topic was the third most-chosen in these particular regions. ‘Data knowledge/security’ is the topic that was chosen least, and this picture is similar for all EHEA regions.

Figure 52

Respondents’ personal and professional topics of interest, by region

Topics of interest	Eastern Europe (n=389)	Northern Europe (n=476)	Southern Europe (n=375)	Western Europe (n=687)	Western Asia (n=165)
Crisis preparedness/management	21%	16%	15%	16%	19%
Data/knowledge security	7%	8%	8%	8%	12%
Digitalisation of administrative tasks	42%	33%	41%	33%	36%
Environmental sustainability and climate action	18%	26%	18%	31%	22%
Inclusion and diversity	24%	38%	29%	37%	28%
Student/staff well-being	48%	31%	39%	33%	44%
Virtual internationalisation activities (COIL, virtual exchange, etc)	28%	27%	31%	28%	24%

Per region: ● most common choice
 ● second most common choice ● third most common choice

Figure 53 provides indications by country of particularly robust response rates in relation to the specific topics of interest, which may provide insight into particular priorities or concerns in different national contexts.

Figure 53

Higher than average interest in specific topics, by country

Topic of interest	EHEA average	Percentage by country
Student/staff well-being	37%	61% Hungary 63% Czechia 62% Azerbaijan
Digitalisation of administrative tasks	36%	60% Romania 57% Slovakia 47% Germany
Inclusion and diversity	32%	47% Netherlands 45% Belgium 45% Sweden
Virtual internationalisation activities (COIL, virtual exchange, etc)	28%	40% Ukraine 35% UK 35% Switzerland
Environmental sustainability and climate action	25%	46% France 38% Norway 38% Türkiye
Crisis preparedness/management	17%	29% Ukraine 26% Austria 25% Switzerland
Data/knowledge security	8%	15% Finland 13% Armenia 12% Spain

Finally, with regard to topic selection, respondents were also invited to suggest additional topics of personal/professional interest, if they did not wish to engage with those topics provided on the survey. Just 5% of respondents to this question (*ie* just over 100 individuals) opted to suggest additional topics, which most typically included focusing on developing partnerships/collaborations with other institutions, for-profit companies and/or NGOs; Internationalisation at Home efforts; employability of students; developing internationalisation strategies; and fostering internationalisation competencies (*eg*, cultural awareness) for staff and students.

DEEPER DIVE INTO THE TOPICS OF INTEREST

All respondents were asked several more questions on the topics they selected as being of particular interest to them, mainly linked to their institution/organisation. This resulted in data on whether respondents agree/disagree with the following statements linked to the topic of interest and how their institution/organisation deals with it:

My institution/organisation...

- has a clear plan for the activities it is pursuing.
- has leaders who are committed to the activities it is pursuing.
- is investing sufficient financial resources in the activities it is pursuing.
- is providing stakeholders with sufficient non-financial resources (time, training, *etc*) to support the activities it is pursuing.
- has a clear plan to measure the effects of the activities it is pursuing.
- has a clear plan for using the data it collects on the activities it is pursuing.
- has made progress with respect to this topic in the last 12 months.

Some interesting insights found in this section include the following:

- When looking at whether an institution/organisation has a clear plan for the activities it is pursuing, 'inclusion and diversity' came out on top with a large group of respondents agreeing with this statement.
- Across all of the key topics, respondents were most commonly inclined to indicate that their institution/organisation was underperforming in relation to providing sufficient financial and non-financial resources.
- Overall, respondents interested in 'virtual internationalisation' were most negative about the way their institution/organisation deals with this topic. Just over one third (34%) indicated that there is no clear plan for this work whilst another 39% were unsure/neutral that the institution has such a plan. Furthermore, leaders are not perceived as committed, there is not enough investment of sufficient financial resources, and data collected is not used.
- 'Data knowledge/security' scored highest when looking at committed leadership, with 61% of respondents agreeing with this statement. As a whole, the respondents choosing this topic were quite positive about how their institution/organisation is doing.
- Respondents were most likely to disagree that their institution/organisation is measuring the effects of the activities they are pursuing in relation to 'virtual internationalisation' (41%) and 'crisis preparedness/management' (39%).

- When it comes to having made progress in the last 12 months, the results are quite positive. For most of the topics at least half of respondents felt progress was made, especially in relation to ‘digitalisation of administrative tasks’ and ‘data/knowledge security’. Interestingly, ‘crisis preparedness/management’ scored lowest, with roughly one third agreeing that progress has been made in this area in the last year, but also almost one third disagreeing with this position. Whilst this topic gained quite some momentum during the COVID-19 pandemic, it seems institutions/organisations may not have made as much recent progress on this topic as respondents would like to have seen.

Future Barometer reporting will focus in more detail on these key topics.

CONCLUSION

Professionals in international higher education play an essential, frontline role in the design and delivery of internationalisation agendas and activities across the European Higher Education Area. Their many and varied perspectives have much to offer institutional leaders, policymakers and other key stakeholders at a moment of significant challenge and opportunity for internationalisation in European higher education. It is therefore vital to understand who they are and what they bring to their roles, how they experience the daily realities of this work, how they perceive the approaches of their employing institutions/organisations and what they make of the many different developments they see playing out across the wider sector.

The significant body of data collected by the EAIE Barometer survey exercise from and about these central actors in the international higher education ecosystem makes it possible to draw several compelling conclusions about the health and vitality of the sector today. Equally important, this research also provides the basis for further conversations about disparities in perspectives and experiences across the EHEA, while also focusing attention on the gaps in our understanding about internationalisation in European higher education.

There is 'good news' to celebrate in the Barometer data, to be sure. There are also indications of both recent and longitudinal changes that bear consideration in terms of their possible effects on the field and those who work in it. And there are signs that higher education institutions and other stakeholder organisations will need to attend to a range of issues and priorities – new and longstanding – in order to achieve their internationalisation goals.

OPTIMISTIC OUTLOOKS, WITH CAVEATS

Front and centre in terms of good news from the Barometer exercise is that, overall, there appears to be a high level of satisfaction amongst professionals working in international higher education across the European Higher Education Area today. As a group, they seem largely satisfied with their jobs/roles and with the sense of purpose they derive from their work. There is a sense of stability across this workforce, as well, with a strong majority of respondents (nearly 80%) expecting to continue working in the field for at least the next three years and just a scant 3% likely to leave the sector within that timeframe, mostly due to retirement.

Meanwhile, over three quarters of respondents feel their institution's internationalisation goals are achievable, and more than 70% of respondents with budget responsibilities are (very) satisfied with the size of the budget they work with. Sizable proportions are also inclined to agree that their institutions have made progress over the last 12 months in relation to key topics of interest, ranging from student/staff well-being to climate action to data/knowledge security.

This general outlook of optimism can be considered in alignment with the findings of the EAIE Barometer, second edition (2018), in which a strong majority of respondents reported feeling positive about the future of internationalisation, while just 4% indicated a negative outlook.

The image is less optimistic when we look closer at the satisfaction levels linked to salary/compensation, work-life balance and feeling valued by one's employer. Additionally, more than one third of respondents indicated being (very) unsatisfied with how responsibilities for internationalisation are organised at their HEI and many express limited confidence in their institution's or organisation's leadership.

Findings such as these provide a sense that, against a backdrop of enthusiasm and engagement, there are also frustrations and unmet expectations. How leaders and policymakers move to understand and address professionals' concerns about some aspects of their employment conditions and the ways that internationalisation is being addressed at the leadership level may not be immediately urgent, but indeed may be important considerations for mid- to longer-term success for internationalisation agendas and initiatives.

INDICATIONS OF CHANGE, WITH NOTABLE VARIATIONS

Change is also a key feature of the current Barometer findings, at the level of both individuals and institutions/organisations, as well as in the domains of policy and practice. For example, a notable proportion of respondents indicate that they are relatively new in their roles, both as a function of being new to the field and because of a job change in the last several years. There are also indications that many who have been in the same role for at least three years have also seen shifts during this time in their positions, whereby new skills and/or more time and effort are required to meet their responsibilities. Some portion of these findings is likely attributable to the profoundly disruptive effects of the COVID-19 pandemic, which touched many aspects of professionals' working lives, not least via the push to leverage online technologies to overcome barriers to in-person contact. Perhaps due to these realities, professionals in the field appear to be keen to continue learning and developing, no matter the years of experience they may already

have in the field. To this point, a striking 85% of respondents indicated a significant or moderate need for training or professional development. Notably, many respondents expressed a specific need for the development of digital skills, including AI.

Change is also apparent in structural and organisational aspects of internationalisation. For example, looking across all three editions of the EAIE Barometer, the data gradually reflects a shift in organisation of responsibility for internationalisation as the purview of a single international office to approaches that feature more coordination between central and decentral teams.

An evolution is also apparent across the three Barometer surveys since 2015 when it comes to the perceptions of influence of national and European-level dynamics on institutional agendas for internationalisation. In the simplest terms, the influence of these prominent actors seems to be waning. Beyond that headline, however, it is important to note significant variations between countries and regions within the EHEA when it comes to the perceived role and impact of national and European-level influences.

What do these various indications of change mean? This can be a difficult question to answer, considering the multifaceted nature of change dynamics, the complexity of higher education institutions and organisations, and the many distinct and interlocking variables that have a bearing on the phenomenon of internationalisation. At a minimum, the information surfaced by the Barometer about changing circumstances in the sector can serve as a trigger for reflection and conversation about the extent to which change dynamics are being overtly recognised and attended to by HEIs and stakeholder organisations. It can prompt thinking about whether the changes seen are welcome or undesirable in some way. And it can foster consideration as to whether change in one corner of Europe is contextually unique or a harbinger of future developments elsewhere.

THE ROAD AHEAD: 'EVERYTHING NEEDS ATTENTION'

The realities of today are important to grasp, as is the change over time that has brought us to this point. Perhaps even more crucial, however, is to gain insight into where we are headed. Respondents to the 2018 Barometer predicted that issues such as distance, online or blended international learning and internationalisation of the home curriculum would become a more central feature of internationalisation at HEIs in the future. It is thus particularly interesting to see that this prediction came true: when asked in the current Barometer survey which topics require more attention for institutions to achieve their internationalisation goals over the next three to five years, the two items most frequently chosen were: strengthening international/intercultural content of the curriculum and virtual internationalisation activities. Additionally, the topics that are

currently of most interest to respondents on either a personal or professional level are 'student/staff well-being', 'digitalisation of administrative tasks', and 'inclusion and diversity', which gives further insight into what is on the minds of professionals in the field at this moment in time.

Possibly even more important, however, the data shows a widespread sense that more or continued attention is required across a range of different topics in order for institutions' goals for internationalisation to be achieved. There are two sides to this key finding. On the one hand, there may be cause to celebrate that the sector as a whole is not fixated on a small number of priorities to the exclusion of others, thus reinforcing the understanding of internationalisation in higher education as a 'comprehensive,' multifaceted undertaking. In practice, however, a sense that 'everything matters' may present serious challenges for institutions and higher education systems, where resources are finite and competing priorities are in play.

Meanwhile, surfacing perceptions about what matters and acting on them is one thing, but making sense of the results of internationalisation efforts is yet another. In this regard, another aspect that will be particularly interesting to follow as we move into the future is the debate around the impact of internationalisation. Just under half of all respondents indicated they feel (very) significant pressure in their roles when it comes to demonstrating the impact of internationalisation and another 63% indicated that some level of urgency around this debate is evident at their institution/organisation. The fact that delivering evidence of impact is most often understood by respondents to be most important to their institutions in relation to rankings and reputation speaks to the power of certain types of 'metrics' in international higher education today. However, the fact that nearly as many respondents also saw their institutions interested in delivering impact by way of student learning outcomes and/or research activity highlights the wide range of concerns that feed into the impact discussion.

In addition to seeing where the conversation on the impact of internationalisation in European higher education has evolved (or not) by the time of the next edition of the Barometer, it will also be interesting to see if the profiles of respondents themselves will change over time. In an era of high interest in matters of diversity and inclusion, over 75% of respondents indicated they do not belong to an underrepresented group. A rough general statistic like this only begins to hint at what lies beneath the surface – quantitatively and qualitatively – at national, institutional and programmatic levels. No matter the countless variations in contexts across Europe – or perhaps precisely because of this multitude of diverse contexts! – opening the door on thoughtful conversations about representativeness across the community of professionals working in our sector is another hoped-for outcome of this extensive research exercise.

The future of internationalisation in European higher education is the responsibility of many and the work to support international higher education encompasses a plethora of topics, domains and considerations. Overall, the current EAIE Barometer provides ample evidence that the professionals working daily to advance this field are enthusiastic and engaged actors, critical observers of contexts and processes, with interests that span the full expanse of topics and issues that frame the sector today. This perspective can serve to ground and strengthen the thinking of institutional leaders, policymakers and other stakeholders across the EHEA.

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