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Changes of ERASMUS Under the Umbrella of SOCRATES

Ulrich Teichler

The largest program in Europe for the promotion of student mobility, ERASMUS, was expected to undergo major changes when it became a subprogram of SOCRATES, the umbrella program of the European Union for various educational activities inaugurated in 1995. Subsequently, though the number of mobile students supported increased, the emphasis of the programs shifted toward teaching staff exchange and curricular innovation. Moreover, the managerial thrust was substantially revised. Funds were not provided to networks of cooperating departments, but to individual institutions of higher education that were required to guarantee the quality of exchange through bilateral contracts with partner institutions and demonstrate the role their SOCRATES-supported activities should play in the context of the institutional policy through the formulation of a European policy statement. The SOCRATES 2000 Evaluation Study provides evidence that the changes during the first years of implementation were less substantial than called for. The quality of student exchange remained more or less stable in spite of substantial decline for support per student. The number of mobile teachers increased considerably, but the duration of the teaching period abroad became shorter. Moderate strengthening of institutional policies and some extension of curricular innovation activities could be observed.

THE ERASMUS APPROACH

In 1987, after a decade of successful experimentation in the framework of the so-called Joint Study Programmes (Dalichow & Teichler, 1986; Smith, 1979), a major program for mobility and cooperation in higher education in Europe was launched. Student mobility has been the most visible component of the ERASMUS program from the outset, and more than half the ERASMUS funds were allocated to student mobility grants. Additional actions of the program provided support for teaching staff exchange, curricular innovations, and other activities (European Commission, 1994).

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In examining ERASMUS as compared with other student exchange activities, we might point out the following characteristics for the first 10 years (see Teichler, 1996, pp. 155-156):

- ERASMUS supports regional mobility, that is, among European countries rather than global mobility.
- ERASMUS promotes temporary study abroad, that is, a period of study forming only part of a course program leading to a degree.
- ERASMUS almost exclusively supports collective mobility. Few free movers receive grants.
- ERASMUS promoted mobility and cooperation within networks of departments sending and receiving students (from 1987 to 1997).
- ERASMUS expects organized study abroad, that is, measures on the part of the participating institutions and programs to facilitate study abroad: preparatory programs, language training, help in accommodation and administrative matters, and so forth.
- ERASMUS encourages curricular integration, ranging from coordinated curricular activities to study abroad programs being an integral part of the home curriculum.
- ERASMUS has an inclusive approach toward temporary study abroad, with recognition on return of the achievements during the study period abroad being the key criterion for granting support.
- ERASMUS is a partial- and an incentive-funding scheme. Students are awarded a moderate grant to cover more or less the additional costs of study abroad, and networks or the universities receive a moderate subsidy for the costs incurred.

ERASMUS soon was widely viewed as the flagship of the educational programs administered by the European Union. In spite of widespread criticism of bureaucratic hypertrophy and too small funding for individual students and universities, ERASMUS is seen as having helped student mobility in Europe rise from an exception to one of the normal options for students and cooperation in higher education be upgraded from a marginal phenomenon toward an activity intertwined with almost all issues of the regular life of a university. It even changed the conceptual map of international student mobility: The traditionally dominant vertical mobility from the less favored toward the most prestigious countries and institutions was complemented by a large component of student exchange on equal terms and mutual trust in the quality of higher education provisions among partners.

In the academic year 1995-1996, ERASMUS became a subprogram of SOCRATES, which brings together most educational support programs of the European Union. In this context, the programmatic and administrative characteristics of ERASMUS were modified as well with some delay, that is, from the academic year 1997-1998 onward (cf. Barblan, Kehm, Reichert, & Teichler, 1998).

- Although student mobility remained the core, other activities were expected to play a relatively stronger role: Financial support for teaching staff was increased, and more emphasis was placed on curriculum development, recognition issues, and the promotion of curricular innovation in higher education through various means (e.g., thematic networks) to foster the spread of the European dimension in higher education.
- The most visible changes of ERASMUS were of a managerial nature. Each institution of higher education had to submit a single application encompassing all its exchange and cooperation activities, thus replacing the application by networks of departments. The institutions were required to stabilize the exchange and cooperation through bilateral cooperation agreements with partner institutions, and they had to formulate a European Policy Statement (EPS) that puts into perspective the activities expected to be supported by ERASMUS as part of a larger framework of European policies and activities of the institution.

The programmatic change was somehow paradoxical: A stronger emphasis on curricular innovation was expected to be achieved by weakening the backbone of curricular innovation and cooperation of ERASMUS in the past, that is, the cooperation in networks of departments. Obviously, a need was felt by those advocating this change to support curricular innovation more strongly through other means than measures primarily serving the mobile students. Increased staff mobility and various measures for curricular innovation should foster the European dimension in higher education programs in a way that is useful or even predominantly geared to the nonmobile students. Moreover, greater organizational stability, coherence, and financial support for mobility and cooperation in higher education were expected to grow out of an increasing involvement of the university leadership.

THE SOCRATES 2000 EVALUATION

The processes and results of ERASMUS were analyzed more thoroughly than those of any other similar educational program. When the program was inaugurated, provision was made for a major evaluation to be undertaken after 5 years; the same was true when SOCRATES was inaugurated in 1995.¹ Within the first few years of the ERASMUS program, various studies were undertaken focusing notably on the conditions of student mobility in specific fields of study.² A major evaluation research project based primarily on statistical analyses and surveys focused on the first 7 years of the ERASMUS program (Maiworm & Teichler, 1997). An additional study based on qualitative approaches summarized the state of ERASMUS in the mid-1990s (Rosselle & Lentiez, 1999). A student survey in the mid-1990s focused on equality of opportunity regarding participation in ERASMUS. The EPSs were analyzed in a project in the late 1990s (Barblan, Kehm, Reichert, & Teichler, 1998; Barblan, Reichert, Schotte-Kmoch, &

Teichler, 2000). Moreover, a multitude of smaller studies addressed a broad range of other issues.

This article aims to provide an overview on the major findings of the SOCRATES 2000 Evaluation Study (Teichler, Gordon, & Maiworm, 2001), as far as they focus on the ERASMUS subprogram.³ The study, as far as it addressed ERASMUS, tried to establish how far the conditions, processes, and outcomes of student mobility and teaching staff have changed. For this purpose, questionnaire surveys were sent to a sample of ERASMUS students, former mobile students who had graduated some years ago, and to teachers, many of whom had taught abroad or were assigned coordination tasks for ERASMUS. As similar surveys were undertaken in the early 1990s, it was possible to analyze the changes over time. Beyond that, the various curricular innovation activities—in the framework of curriculum development, intensive programs, and the thematic networks—were examined with the help of an analysis of their self-reports. Finally, attention was paid to the question of how the role of the centers of higher education institutions had changed in managing and shaping the European activities as a consequence of the SOCRATES approach, which discontinued support for networks of cooperating departments and encouraged the centers of higher education institutions to become strategic actors and take over administrative responsibility for the activities that received support. A questionnaire was sent to rectors of higher education institutions in Europe who had been awarded a SOCRATES grant. The analysis also drew on the previous EUROSTRAT studies on the European policies of the higher education institutions.

It should be noted that although the processes and outcomes of ERASMUS were analyzed so carefully, a rational match of a rhythm of evaluation on one hand and decision making regarding the revision of the program on the other hand never emerged. The discrepancy between the appropriate timing of analysis and the need for information serving decision making even grew over time. The revision of ERASMUS in the framework of SOCRATES took root only in 1997-1998, that is, 2 years later than scheduled. But the timing of the evaluation was kept in 1999-2000. Thus, the SOCRATES 2000 Evaluation Study could only analyze the experiences of mobile students and teachers of the academic year 1998-1999, that is, the 2nd year of the revised conditions. Therefore, the SOCRATES 2000 Evaluation Study could not offer a complete account of the impacts of the new framework of ERASMUS.

Moreover, the key decisions for the future of SOCRATES (i.e., SOCRATES II) were already taken in 1999, 1 year earlier than scheduled. Thus, the SOCRATES 2000 Evaluation Study could not serve the key strategic decisions, but rather the incremental changes within a set framework. This does not affect the quality of the study, but it reinforced the view among those involved in shap-

ing the SOCRATES program that evaluation and monitoring should be undertaken on a more continuous basis.

STUDENT MOBILITY

Changing Conditions

The early representative surveys on ERASMUS student mobility had shown that no major changes had occurred from the 2nd year (1988-1989) to the 4th year (1990-1991) of the program. There were neither visible (positive) consolidation effects nor (negative) dilution of quality effects as possible consequences of expansion of the program. Problems of late timing of the award decision and the actual provision of money, as well as some problems of administration, accommodation, and funding while abroad, remained stable. The students considered preparatory means by their home institutions of higher education and support measures by the host institutions while being abroad on average as satisfactory. They continued to appreciate the cultural and social value of study abroad somewhat higher than the academic value. The majority of ERASMUS students continued to believe that academic progress abroad was higher than during a corresponding period at home, but recognition of academic progress abroad on return was only about 75% on average, and students believed that their overall period of study would be prolonged due to the study period abroad by about 40% on average of that period.

What kind and what extent of change could be expected up to the 12th year of ERASMUS (1998-1999), which was the focus of the surveys undertaken in the framework of the SOCRATES 2000 Evaluation Study? One could assume that the students' experience within ERASMUS could change as a consequence of the following factors.

- First, the quantitative expansion (e.g., increase in the number of ERASMUS students) could come into play, for example, in diluting the quality as a consequence of less select participation or less thorough academic and administrative support for the average student participating.
- Second, changes in the management of the support scheme and in the level of support (e.g., processes of application and award, as well as level of funding per student) could be relevant for the processes of studying temporarily in another European country and for the outcomes of this activity.
- Third, we might ask whether changes in the general environment (e.g., greater Europeanization and internationalization in higher education and in the world of work in general) might affect the learning of the mobile students. They might consider them-

selves less avant-garde, but they also might view study abroad as a more important element for their educational and professional career.

- Fourth, as already pointed out before, we might expect a consolidation process as regards conditions and provisions for student mobility within the higher education institutions, which eventually should lead to a higher level of success.
- Fifth, the shift from the network of departments approach of the former ERASMUS to the institutional responsibility approach of ERASMUS under SOCRATES could cause changes in the academic and administrative conditions for mobile students, for example, an improvement of the elements of organized study abroad and a decline of the elements of curricular integration.
- Sixth, we can examine whether specific measures aimed to improve the conditions and provisions of student mobility worked. The extension of the European Credit Transfer System (ECTS) certainly is the most visible one of these measures.

We should bear in mind, however, that a comparison of the results of the surveys of the early 1990s and those conducted in 1999-2000 provides only an opportunity to examine the changes of students' experiences over time. It is not possible to disentangle the causes clearly, but it remains the target of a somewhat subjective interpretation of which factors actually caused the changes observed.

Number of ERASMUS Students

We observe a substantial growth in the overall number of students studying in another European country with an ERASMUS grant. The real number increased from about 10,000 in the academic year 1988-1989 and 28,000 in 1990-1991 to about 80,000 in 1995-1996 and about 92,000 in 1998-1999. In terms of 5-year periods, the total number of ERASMUS students increased from about 230,000 in the 1990-1991 to 1994-1995 period to about 460,000 during the 1995-1996 to 1999-2000 period, that is, it doubled. The number of eligible countries rose from 12 in 1990-1991 and 18 (new European Union member states and European Free Trade Association [EFTA] countries) in 1995-1996 to 29 in 1999-2000. Ten Central and Eastern European countries and Cyprus became eligible since the launching of SOCRATES.

It should be noted that many publications on ERASMUS erroneously name substantially higher figures. The European Commission annually published an estimated number of ERASMUS students based on the number of students named in the successful applications. The actual number of students going abroad with ERASMUS support is substantially lower. The so-called "take up rate" (the actual:estimated ratio) declined during the years to less than 50%. The ERASMUS budget takes this ratio for granted. The actual number of ERASMUS

students is known only about 2 years later than the estimated number, and it receives much less public attention.

Cost Coverage of the ERASMUS Grant

There was obviously a reduction of the amount of ERASMUS grant per student. According to the statistics of the European Commission, ERASMUS students in 1990-1991 received on average 1,220 ecu and the 1993-1994 cohort 1,089 ecu. The 1997-1998 ERASMUS students received 959 euro on average. This decline of 21% in the support for additional costs of study abroad during a period of 7 years took place when the ERASMUS students' additional expenses for the study period abroad increased by about 40%.

According to the ERASMUS student surveys compared in this article, the share of the additional expenses for studying abroad (cost for the stay abroad, travel, continuous costs at home while studying abroad) covered by the ERASMUS grant was 89% in 1990-1991. It dropped to 52% on average in 1998-1999. The total amount of the additional expenses not covered by ERASMUS increased during that period from 166 ecu to 891 euro on average (see Table 1). Hence, as the coverage by home country grants and loans did not increase, the additional burden had to be borne by the students, their parents, and their relatives.

The available figures suggest that the students and their parents and relatives took on the additional expenses with no major consequences for the ERASMUS program. The pattern of parental background remained unchanged (the proportion of ERASMUS students whose parents were graduates from institutions of higher education increased roughly corresponding to the increase of that proportion among all European students) and the proportion of ERASMUS students complaining about serious financial problems during the study period abroad did not grow. Yet one must bear in mind that serious financial problems quoted by about one fifth of the students remained one of their main problems; the additional costs could have been a deterrent for the rising number of students who initially wished to participate in ERASMUS but eventually did not go abroad.

Administrative and Academic Support

ERASMUS students of the late 1990s embarked to a somewhat lesser extent on academic preparation for the study period. They report, however, that the host institution provided more substantive academic and administrative advice and assistance than the ERASMUS students had perceived in the early 1990s. It is

Table 1 The Role Played by ERASMUS in Funding Study Abroad in 1990-1991 and 1998-1999 According to Student Surveys

	1990-1991	1998-1999
Monthly expenses during study period at home (ecu/euro)	363	406
Change in expenses at home: 1990-1991 = 100 (M/%)	100	112
Monthly expenses during study period abroad (ecu/euro)	581	712
Change in expenses while abroad: 1990-1991 = 100 (M/%)	100	123
Additional monthly expenses while abroad (ecu/euro)	218	306
Change in additional expenses while abroad: 1990-1991 = 100 (M/%)	100	140
Monthly ERASMUS grant (ecu/euro)	194	158
Change in ERASMUS grant: 1990-1991 = 100 (M/%)	100	81
Additional monthly costs not covered by ERASMUS (ecu/euro)	24	148
Change in additional costs not covered: 1990-1991 = 100 (M/%)	100	616
Total additional costs not covered by ERASMUS (ecu/euro)	166	891

Source: Teichler, Gordon, and Maiworm (2001, p. 74).

Note: Data in the table were from the following survey questions: How much money did you receive as an ERASMUS grant for your whole study abroad period in 1998-1999? What were the overall costs of your return trips? and Apart from return travel and related expenses, how much did you spend on average per month in your own country and during your ERASMUS-supported period abroad?

widely assumed that the SOCRATES move away from the networks of academics toward institutional responsibility could hamper academic support and increase administrative and service support. The findings only partially support this interpretation. The SOCRATES 2000 Evaluation Study was undertaken too early to test this hypothesis; the near future will show whether this hypothesis will be confirmed.

Recognition and Credit Transfer

According to the 1998-1999 ERASMUS students not participating in ECTS, about three fourths of their achievement abroad was recognized by their home institution on their return or by another institution if they went somewhere else after the ERASMUS-supported study period. This remained unchanged from the beginning of the ERASMUS program until the late 1990s.

In 1989-1990, the European Commission began to support a pilot project on credit transfer. The participating departments in ECTS not only had to agree on booking achievements in terms of study load calculated by credits, but they also had to provide detailed information on the courses and other study provisions well in advance and to determine the individual students' course schedule prior

Table 2 Degree of Recognition and Nonprolongation in 1990-1991 and 1998-1999 According to the ERASMUS Students by Type of Recognition

	Degree of Recognition			Degree of Nonprolongation		
	ECTS	Other	Total	ECTS	Other	Total
1990-1991	95	74	75 ^a	77	54	55 ^a
1998-1999	87	74	81	53	37	45

Source: Teichler, Gordon, and Maiworm (2001, p. 91).

Note: ECTS = European Credit Transfer System. Data in the table were from the following survey questions: How far have the academic studies you undertook at the host institution been recognized (granted credit or otherwise considered equivalent) by the home institution? and How is the ERASMUS study period likely to prolong the total duration of your studies?

a. Mean of percentages based on two separate surveys and weighted according to ERASMUS overall statistics.

to their stay abroad. During the first few years, when a small number of departments participated, the degree of recognition through ECTS credit transfer was even higher than 90%. Mobile students of the late 1990s whose achievements abroad were registered in terms of ECTS actually reported an average credit transfer of slightly more than 85%. As the available data suggest that the study provisions and conditions for ECTS students are similar on average to those of the other students, we can conclude that nonrecognition was almost cut in half through a booking of achievements in terms of credits.

We should bear in mind, however, that these data are not a measure of the degree of credit transfer among institutions or programs cooperating in ECTS in the strict sense of including the accompanying measures of information and advance scheduling of the study activities abroad. Because students were only asked whether their achievement abroad was counted in terms of credits, they include also those who did not experience the activities viewed as typical for ECTS.

In 1990-1991, ECTS was a small pilot program. Until 1998-1999, the proportion of students being awarded credits had grown to about half of all ERASMUS students. Due to that growth, the average degree of recognition for all ERASMUS students grew from about three fourths to slightly more than 80% (see Table 2).

The extent to which achievement abroad is recognized on return is not necessarily a valid measure for the extent to which study abroad is accepted as substituting for corresponding study activities at home. In the United Kingdom, for example, we frequently note an official extension of the length of the program—

whereas the students studying at home might be required to be enrolled for 3 years, the students going abroad for 1 year might have to study for 4 years altogether to be awarded the same level of degree. In many other European countries, students might individually prolong the overall duration of study because not all the achievements during the study period abroad recognized on return are accepted eventually as substituting for course requirements at home. Therefore, as we have argued, the ultimate yardstick of recognition is that the overall study period up to the award of the degree will not be prolonged by the study period abroad, and we asked the students to estimate the likely prolongation due to the study period abroad. According to this yardstick, developments were less promising. Despite the extension of the use of ECTS, the expected prolongation of the overall study period due to the period abroad increased on average from about 45% of the overall study period in the early 1990s to 55% in the late 1990s (see Table 2 for the percentage of nonprolongation).

The discrepancy of trends might be seen as an indication that the greater formal recognition is artificial. There seems to be an increase in the achievements that are recognized but do not seem to count for the overall study requirement. Or we might state that we observe an increase of paper tiger recognition.

Continuity

The findings reported so far show that some noteworthy changes have occurred. Altogether, however, a comparison between the ERASMUS students of the early and the late 1990s suggests that nonchange, stability, or continuity dominate, some of which deserve attention.

First, the long time span—starting with the application via information about the award decision and eventually the provision of financial support to the students—remained more or less constant, with 8.3 months in the early 1990s and 8.4 months in the late 1990s. In 1998-1999, ERASMUS students received the first money on average 2 months after they went abroad. This was notably felt as hardship for students in the Central and Eastern European countries newly involved in ERASMUS. Obviously, measures aimed to reduce this long period and the late transfer of funds were counterbalanced by factors that contributed to the complexity and slowness, and they seem to have neutralized each other.

Second, the students' ratings of their achievements abroad remained more or less constant. Of the 1998-1999 ERASMUS students, 55% rated their academic progress abroad as higher than they would have expected during a corresponding period at home, 27% perceived the same academic progress abroad as at home, and only 18% believed that they learned less abroad than at home. The responses were 53%, 27%, and 20% in 1990-1991, respectively. Also, the teachers' ratings

Table 3 Percentage of Languages Used in the Courses Taken by ERASMUS Students in 1990-1991 and 1998-1999

	1990-1991	1998-1999
English	41	44
French	22	18
German	15	15
Spanish	10	8
Italian	7	7
All other languages	5	8
Total	100	100

Source: Teichler, Gordon, and Maiworm (2001, p. 87).

Note: Data in the table were from the following survey question: What was the language(s) of instruction of the courses you followed at the host institution?

of the academic quality and achievements of ERASMUS students remained on an equal level to that of their home students. Thus, the changes named above in support for the preparation of the study period abroad and for academic and administrative concerns of incoming students (who could have been affected by the new SOCRATES approach) actually do not seem to have led to significant changes regarding quality.

Third, accommodation is no longer viewed as a serious issue, as was feared at the beginning of ERASMUS. The quantitative growth of ERASMUS-supported student mobility has not led to greater problems. Recent ERASMUS students even rate the quality of accommodation abroad slightly more positively than those of the early 1990s.

Fourth, the pattern of language use has not changed substantially. Whereas it is widely believed that the internationalization of higher education reinforces the drift toward English as the lingua franca, the use of the various host country languages did not decline substantially, and the number of students who were taught abroad in English did not increase significantly. According to the ERASMUS student surveys, the use of the host country language declined from 65% on average in 1990-1991 to 59% on average in 1998-1999, and the use of English increased from 41% to 44% (see Table 3). Taking into account that various small Western European countries and some Central and Eastern European countries joined ERASMUS during the 1990s, one would have expected a higher increase of the use of a third-country language and notably of English just due to this composition effect than actually occurred.

Finally, assessment of the ERASMUS program by the participating students did not change substantially in any respect. The overwhelming majority of ERASMUS students continue to consider ERASMUS as a very valuable experi-

ence in terms of cultural experience and personality development. Academic progress also tends to be viewed positively. Generally speaking, the students are very satisfied with their ERASMUS experience.

Employment and Work of Former ERASMUS Students

The 1988-1989 ERASMUS students surveyed who had provided their addresses for possible follow-up surveys were surveyed again about 2 to 3 years (Teichler & Maiworm, 1994) and finally about 5 years later (Maiworm & Teichler, 1996). In 1999-2000, a follow-up survey of a European university graduate survey 4 years after graduation was undertaken in the framework of the SOCRATES 2000 Evaluation Study, which addressed those university graduates in five European countries who had been internationally mobile during their course of study. This survey made possible a comparison of the early career of former ERASMUS students, former students mobile with other means of support, and formerly nonmobile students. Although the third survey is different from the other two surveys as far as the target group is concerned, a comparison provides clues about changes of employment and work of former ERASMUS students over time.

In examining the impact of ERASMUS on subsequent employment and work, we note that more mobile students than nonmobile students

- take on job assignments with international components,
- are employed abroad,
- are assigned work abroad (if employed by a home country employer),
- assess their professionally relevant competence highly, and
- experience a smooth transition to employment.

However, few former mobile students believe that they have embarked on a more successful career than their fellow students who were not mobile, and few have a higher income. In this respect, however, we note a difference between the two surveys. The earlier cohort of former ERASMUS students believed that they had income advantage compared to other former students. The more recent survey suggests that there is a significant income advantage for former ERASMUS students and for other formerly mobile students.

Formerly internationally mobile students working abroad do not seem to be better paid than formerly nonmobile students working abroad. But study abroad, according to the survey data (see Table 4), clearly increases the probability of working abroad after graduation, and this contributes to a somewhat higher income.

Table 4 Importance of International Competences for Graduates' Current Work (in percentages)

	International Experiences During Study Abroad					Total
	ERASMUS Supported	Not ERASMUS Supported	Support Unknown	Mobile	Nonmobile	
Professional knowledge of other countries (e.g., economic, sociological, legal) ^a	40	45	42	42	20	24
Knowledge/understanding of international differences in culture and society, modes of behavior, lifestyles, etc. ^a	52	58	53	54	32	36
Working with people from different cultural backgrounds	62	62	62	62	43	46
Communicating in foreign languages	60	69	58	60	30	35
<i>n</i>	339	297	1,424	2,060	10,115	12,175

Source: Teichler, Gordon, and Maiworm (2001, p. 113).

Note: Data in the table were from the following survey question: How important do you consider the following competences for doing your current work?

a. On a scale ranging from 1 (to a very high extent) to 5 (not at all).

TEACHING STAFF MOBILITY

As already noted, student mobility was viewed as the core of ERASMUS from the inauguration of the program. The relative weight was to shift gradually under the umbrella of SOCRATES. Under these conditions, it can be viewed as a success that all information suggests that the outcomes of student mobility predominantly assessed positively in the past did not decline under conditions of quantitative growth of the number of mobile students and decreased support per student.

The conditions are different for teaching staff mobility in the framework of ERASMUS. ERASMUS-supported teachers were initially expected to teach at least for 1 month abroad. The survey of 1990-1991 suggests that on average they spent 24 days in the host countries; this was due to the fact that the minimum obviously could not be upheld because most teachers just had to squeeze in their

teaching experience abroad with nonreduced teaching assignments at home. Also, other information provided suggests that home institution support for teaching staff exchange was limited. The survey (Kreitz & Teichler, 1997) indicates that the conditions for organizing a teaching period abroad were considered deplorable by most teachers in the early 1990s. Most of the actually mobile teachers obviously were among those enthusiasts of the early stages of ERASMUS who were strongly involved in student exchange and tried their best to teach a period abroad to improve and stabilize the arrangement of student exchange with partner departments.

In the framework of SOCRATES, ERASMUS was expected to improve and serve a greater number of functions. First, as regards the conditions for organizing a teaching period abroad, improvement was clearly on the agenda. Second, with the launching of SOCRATES, direct support for networks of departments was discontinued and there were fewer travel funds to support coordinators' travel in this framework. Therefore, teaching staff mobility could be expected to take over part of the functions traditionally served by coordinators' travel. Third, ERASMUS was also expected to serve the nonmobile students and to play a major role in the recent efforts to make ERASMUS beneficial for curricular innovation.

Actually, the number of mobile teachers supported by ERASMUS increased substantially. To our knowledge, exact data on their number are not extracted regularly from the reports of the teachers or the higher education institutions, but it was calculated to be about 1,400 in 1990-1991 and 7,000 in the late 1990s.

However, the average duration of the stay abroad declined substantially. The available surveys suggest an average drop from 24 days in 1990-1991 to just longer than 8 days in 1998-1999. According to the information available, courses provided by the mobile teachers were part of the regular host program as frequently as in the past, and they served the reinforcement of the student exchange as often as in the past. Still, such short visits are certainly not a signal of a growing curricular involvement.

The share of the mobile teachers' expenses borne by the ERASMUS grant dropped by an average of almost 10%, from about 70% in 1990-1991 to slightly more than 60% in 1998-1999. Unlike student mobility, the additional costs were not borne by the mobile persons, but primarily by the home institutions.

Except for the changes in funding and the reduced period abroad, the responses by the mobile teachers of the late 1990s are very similar to those of their predecessors of the early 1990s.

- First, the conditions for organizing a teaching period abroad continue to be considered deplorable by the mobile teachers and their colleagues who act as coordinators of student mobility.
- Second, teaching abroad remained integrated in the host country curriculum to the extent it was in the early 1990s in terms of being part of the regular programs, compulsory, and credited. If teaching staff mobility had become a more targeted means of serving the nonmobile students, one could have expected a higher degree of integration.
- Third, when abroad, mobile teachers are just as involved in other tasks as their predecessors in the early 1990s. They seem to play a similar role in advising home and host students and in curricular matters to the one they played in the past. Teaching staff mobility obviously did not hamper student mobility as a consequence of greater emphasis of ERASMUS in the framework of SOCRATES on nonmobile students and curricular innovation.
- Finally, mobile teachers continue to believe that teaching staff exchange is very valuable for themselves, the home and host mobile students, and the curricula in general.

All indications suggest that the role of teaching staff mobility has not changed as much in recent years as was hoped for. All available information neither suggests any improvement in terms of emphasis on nonmobile students or curricular innovation nor any drop in the role it plays for student mobility. As higher expectations determined the increased support for ERASMUS teaching staff exchange in the framework of SOCRATES, the findings obviously either call for improvement or for a down-leveling of expectations.

CURRICULAR INNOVATION AND THE ROLE OF THEMATIC NETWORKS

Curricular innovation was viewed as an area of growing importance when ERASMUS became a subprogram of SOCRATES. One could argue that student mobility puts great emphasis on experiential learning: Students broaden their scope through direct experience of another environment. Similarly, as internships do not only serve a better understanding of the world of work but also indicate that universities are not perfect in helping students to understand the world of work, study abroad arrangements are not merely a good opportunity for the students to change their conceptual map due to contrasting experience, but they are also an indication that the universities are far from being perfect in broadening their students' views with the help of comparative approaches in the framework of conventional teaching and learning modes. A renewed emphasis on curricular innovation as regards European and international learning could be

viewed as a step of maturation of the universities: Instead of costly and loosely structured experiential learning through periods abroad, curricular innovation could target the substance of the subjects more directly. And although student mobility directly serves a minority, curricular innovation can be beneficial for the majority. Finally, whereas student mobility is valuable for those involved, curricular innovation (if successful) can serve many institutions and departments if disseminated as a model.

Student mobility within ERASMUS was viewed from the outset as qualitatively better if embedded in curricular innovation, and it was widely assumed that greater student mobility, in turn, would stimulate curricular innovation. In the framework of SOCRATES, many subprograms were set up to serve curricular innovation in higher education. Applications under the category of curriculum development (CD) had to be specified according to curricula at initial or intermediate level (CDI), new degree programs at advanced level (CDA), European modules (EMs) focusing on other countries, and integrated language courses (ILCs). Intensive programs (IPs) were also supported. The majority of thematic networks (see Ruffio, 1998), a new area of activity in SOCRATES whereby many experts cooperate to analyze and improve the situation of major areas of higher education, addressed curricular issues. Outside ERASMUS, LINGUA, OPEN AND DISTANCE LEARNING, ADULT EDUCATION, and also the areas of COMENIUS addressing teacher training offer higher education institutions the possibility of obtaining financial support for curricular innovation.

In the framework of the SOCRATES 2000 Evaluation Study, applications and reports of 53 CD projects and 16 thematic network projects were analyzed. The analysis focused on issues of implementation, links with other activities, and the perceived outcomes and their quality. The available data show that since ERASMUS was modified under SOCRATES, every year 13% of the higher education institutions receiving grants through an institutional contract were provided with funds for the coordination of CD projects and 13% for the coordination of IPs. On average, 250 CD projects and 300 IPs were granted annual support. CD projects, most of which asked for support during a period of 3 years, comprised partners from five countries on average. They were awarded some 17,000 euro—a sum that the coordination institutions had to share with their partners. According to estimates, about 30% of the higher education institutions awarded support in the framework of SOCRATES institutional contracts participate in CD projects. On average, IPs received 11,000 euro a year that had to be shared with 15 partners from seven countries on average.

The role of curricular innovation was often addressed in the European Policy statements that the institutions of higher education had to formulate in 1997 for

the first time to be eligible for SOCRATES support. In explaining the relevance of various SOCRATES-supported activities for the policy of the higher education institutions as a whole, most institutions underscored in their EPS that they continued to consider student and teacher mobility as being the key areas. But more than 40% also laid great stress on ECTS, more than one third on CD and other activities of curricular innovation, and more than one quarter on IPs.

It is obvious that many institutions consider that curricular innovation should be at the heart of systematic efforts of Europeanization and internationalization of higher education. But some caution was expressed regarding curricular innovation when reflecting institutional policies. This was because most curricular innovation activities affected individual fields of study and were thus of little importance to the institution as a whole.

According to the analysis of curricular activities within SOCRATES, CD projects seem to greatly serve interdisciplinary concepts. Those that aim at developing new degree programs at the advanced level seem to be the most ambitious. Various projects take on board popular approaches to teaching and learning, for example, the use of information and communication technology, open and distance learning, and competency-based learning.

Thematic networks often provide fruitful overviews on the substantive approaches to fields of study and modes of teaching and learning. But it is less certain whether many actually succeed in developing new concepts that are valuable for curricular innovation.

The funds provided for CD, IPs, and thematic networks seem to be sufficient to reinforce a certain degree of stability and structure for those who are willing to take an active part in curricular innovation. The great professional autonomy of academics in setting priorities in the use of their work time is obviously fertile ground for relatively small amounts of financial support to go a long way.

Yet a certain number of participants remain inactive. Interest is often divided between those who only participate in the development of blueprints for curricular innovation and those who try to change things. There are often barriers to the implementation of curricular innovation.

Those who are involved in curricular innovation often express dissatisfaction because they do not see the meaning of their activities beyond being an island of innovation for those who participate. They want feedback regarding quality, would appreciate some dissemination, would like to know where similar or contrasting innovation is visible, and so forth. These comments do not so much call for evaluation as an instrument of control as for activities to differentiate between successful and less successful experiments and to help those who had embarked on innovative activities to improve and disseminate good practice.

At the time the SOCRATES 2000 Evaluation Study was undertaken, it was premature to assess how successful thematic networks can be in helping to sort out and disseminate innovation in higher education with a European dimension. Various comments suggest that the expectations were substantially higher when support for thematic networks began than they were after some period, but the SOCRATES 2000 Evaluation Study was undertaken before the final reports of the first wave of projects were available. At any event, an ambitious study in this area would have to entrust various disciplinary curricular experts with such a task.

THE SOCRATES APPROACH OF DISCONTINUING SUPPORT FOR DEPARTMENTAL NETWORKS AND REINFORCING AN INCREASING INSTITUTIONAL RESPONSIBILITY

The managerial changes of ERASMUS in the framework of SOCRATES were analyzed in the late 1990s in the so-called EUROSTRAT study coordinated by the Association of European Universities (CRE). In one of the publications of this project, the aims pursued and the procedures required by the SOCRATES programs were described as follows:

The most visible changes of ERASMUS in the new context of SOCRATES were of a managerial nature. For the purpose of being awarded support from the academic year 1997/98 onwards,

- (a) each institution of higher education had to submit *one application encompassing all its exchange and cooperation activities*, thus replacing the previous pattern of submission of applications by individual networks of cooperating institutions (Inter-University Cooperation Programmes). This application became the basis for an "Institutional Contact" between the European Commission and the individual institution of higher education.
- (b) The institutions of higher education applying for SOCRATES were expected to keep and provide on request written traces of the cooperation that had been established between them and other European institutions. *Bilateral cooperation* agreements between partner institutions substituted the inter-university agreements between networks of departments in the past.
- (c) Each institution submitting an application for SOCRATES support was requested to include in its application a *European Policy Statement (EPS)*. This statement was designed to provide a framework for all the actual European activities to be carried out within the applying institution and to define the role SOCRATES support should play in this framework.

This *managerial change* of the SOCRATES programme was generally conceived to imply more salient changes than a mere shift of bureaucratic procedures. Implicitly,

SOCRATES challenges the institutions of higher education wishing to be awarded grants for cooperation and mobility

- to reflect and put a stronger *emphasis on the coherence of goals* to be pursued and the coherence of European activities to be undertaken,
- to *strengthen the responsibility of the central level* of the higher education institutions regarding European activities, notably in taking priority decisions, in providing a support structure and in ensuring the resource basis for European activities, and
- to *develop and reinforce strategic thinking* in terms of setting clear targets and pursuing them successfully. (Kehm, 1998, pp. 9-10)

As the findings of the EUROSTRAT study suggest, the SOCRATES approach has led many higher education institutions to take stock of their European and international activities. This resulted in greater transparency and a growing awareness of the institutions' strengths and weaknesses concerning their European commitments.

SOCRATES also triggered off the creation or extension of consultation processes within higher education institutions to discuss European and international matters. Similarly, the decision-making process on matters of internationalization and Europeanization was linked more closely to that of key issues of the institutions and was often streamlined.

Furthermore, there are also indications that the support for services and administrative processes was improved and subsequently professionalized. This was realized in most cases with a limited growth of the staff in charge of those functions.

Finally, the findings of the EUROSTRAT project showed that many higher education institutions consider European and international issues more strategically than in the past. Most did not feel merely the need to formulate a European policy to be eligible for SOCRATES support or enumerate operational targets or embellish trivial operations by exaggerated proclamations. Rather, moves toward policies seem to be emerging.

The surveys undertaken in the framework of the SOCRATES 2000 Evaluation Study suggest, however, that the changes were moderate. Some findings of the institutional survey and the teaching staff survey deserve attention in this context.

- Few reassignments of responsibilities were made between the central and department level and between the various actors.
- The administration and service functions of academics were reduced, but academics continue to take over still almost as many educational tasks as before and continue to be involved in the decision-making processes.
- As the number of staff positions for the administration and services related to international activities only grew marginally, many of the respective activities remained the academics' tasks.

The EUROSTRAT study also indicated limited moves toward strategic action on the part of higher education institutions.

- Most institutions focused so much on SOCRATES in their EPS that one can wonder whether they had developed a general European policy in which the SOCRATES activities could be embedded.
- Regarding student mobility, most institutions were in favor of spreading it across all departments rather than setting visible priorities.
- As regards curricular innovation, most institutions of higher education applying for SOCRATES support simply supported the projects proposed by the academics in their application for SOCRATES grants and waited for the European Commission to decide which projects would receive sufficient funds for their implementation.
- The specifications and rules set by the European Commission for support were often viewed as limiting the room for maneuver concerning original strategic contributions to innovation.

In the institutional survey carried out in the framework of the SOCRATES 2000 Evaluation Study, concern was expressed about the academics' interest in being involved in ERASMUS. But it was premature at that time to assess whether the motivation of academics greatly declined when the support for networks of cooperating departments was discontinued. The concern, however, did not seem to be completely unfounded.

THE ADMINISTRATION OF SOCRATES AS PERCEIVED IN THE HIGHER EDUCATION SYSTEM

Already before the launch of SOCRATES, criticisms of ERASMUS primarily addressed the framework of the support program and various elements of the program administration. This has not changed in recent years. The SOCRATES 2000 Evaluation Study did not provide any evidence that the level of dissatisfaction in those respects had dropped in recent years. Widespread critique continues to be voiced notably regarding four issues.

- The funds for each beneficiary and activity were widely viewed as too small.
- Critique was widely voiced that a too great administrative load was required by the conditions of application and reporting and the complexity of activities induced by the conditions for support.
- The timing of award decisions and provision of funds was frequently criticized as being too late.
- Many of those involved in ERASMUS within the higher education institutions felt that a climate of mistrust was induced by the rules regarding provision and use of funds as well as by the reporting requirements.

Regarding timing, the observations made in the SOCRATES 2000 Evaluation Study suggest that many of the efforts to redress this state of affairs have not been successful. Notably, the moves toward a more decentral pattern of administration of the program, that is, a larger involvement of national agencies, did not reduce the average time span because of the increased needs for coordination between the central and decentral actors in the administrative processes.

According to the SOCRATES 2000 Evaluation Study, the critique of the heavy administrative burden for application and reporting implicitly tends to address three different dimensions. The first dimension is that of reporting as such, that is, providing information on the aims and activities envisaged and actually undertaken. According to the authors of the evaluation study, this certainly could be reduced if the application and report forms were designed from the outset in a way that could easily serve various monitoring and evaluation purposes.

The second dimension is that of accountability. The burden of the workload for application, administering the funds made available, and reports on their utilization was viewed as clearly out of proportion to the limited sums made available. Lean bureaucracy was called for.

The third dimension is that of a critique of the prescriptive nature of the SOCRATES support scheme as a whole. Many actors in the higher education institutions seem to believe that the SOCRATES program should not divide its support provisions in so many small categories that encourage certain activities and make others ineligible. Rather, the SOCRATES program should stimulate innovation more broadly and eventually support the range of activities that are required in the framework of innovative proposals made by the individual higher education institutions in their application. As was expressed in the EUROSTRAT project,

Whereas many national governments in Europe try to modernize higher education through substitution itemized funding by yearly financial “envelopes”, short-term funding by mid-term resource provision, bureaucratic control by a combination of prior targeting and post hoc evaluation, tight prescriptions by empowerment, the European Commission preserves traditional modes of short-term funding, detailed earmarking, limited resource transfer capacity, etc. . . . all the accounting modalities that discourage responsibility and strategic thinking. (Barblan & Teichler, 1998, p. 15)

Most students, teachers, and administrators involved seem to be highly motivated and seem to consider ERASMUS-supported activities stimulating and satisfying for themselves and academically valuable. This general mood is so positive that many of the problems incurred are considered irrelevant when viewed in the light of their institution’s development of Europeanization and internationalization.

RECOMMENDATIONS

The SOCRATES 2000 Evaluation Study was expected not only to analyze the state of affairs, but also to formulate recommendations for improvement. Actually, the study stated recommendations only insofar as the analysis provided substantial plausibility. The recommendations regarding ERASMUS are cited here in full length:

For various reasons, one could not recommend drastic changes. The major decisions for SOCRATES II have already been taken. The satisfaction of the actors and beneficiaries is generally very high. However, there could be flexibility in choosing different directions of activities and different interpretations where the European dimension should be strengthened. The programme will only be acceptable in the political arena if it serves large numbers of students, teachers and institutions and a limited number of more ambitious and more costly pilot innovation projects.

This does not mean that the evaluation study can only recommend to continue as envisaged.

First, it seems advisable to consider measures to preserve the interest of academics in serving temporary study abroad. Without returning to the "old" ERASMUS approach of supporting networks of cooperating departments, the role of academic cooperation could be strengthened by providing different institutional support for student mobility according to the quality of the concepts of academic support of student mobility and by earmarking the majority of funds for institutional support for this purpose.

Second, teaching staff mobility could be more valuable if the award of funds is based on the quality of envisaged mobility in terms of serving academic support for mobile students, being integrated into the regular host institution programme and serving projects of curricular innovation.

Third, institutional strategies are more likely to be reinforced if the higher education institutions could see that the creativity of the strategy and the consistency between concepts and envisaged activities are strongly rewarded. They might also broaden their scope if the SOCRATES programme was less specific in the categories of programmes and lists of activities which are eligible for support.

Fourth, an in-depth study of the results of curricular innovation activities in higher education in the domain of SOCRATES support should be undertaken in the near future. It should not merely be seen as an assessment activity that aims to provide a basis for future changes of the SOCRATES support scheme, but should be of immediate help for the existing projects to evaluate their strengths and weaknesses, improve their chances of implementation and disseminate the results.

Fifth, this evaluation of ERASMUS must reiterate that a reform of the ways the SOCRATES programme is managed is urgent, although futile efforts of the past may discourage recommendations of this kind. Yet, it would be a great shame if the critiques were not seen as a stimulus to speed up the award processes, to set clearer award priorities for interesting and consistent innovative proposals, to encourage interesting poli-

cies by reducing the many prescriptive elements of SOCRATES concerning activities that are eligible for support, and to change the reporting system from less emphasis on administrative and financial compliance to information that can be valuable for substantive evaluation and be usefully disseminated. (Teichler, Gordon, & Maiworm, 2001, p. 188)

CONCLUDING OBSERVATIONS

The aim of SOCRATES to create closer ties between various European support schemes, that is, between support for the universities (ERASMUS) and the schools (COMENIUS), between these core programs and so-called transversal programs (such as OPEN AND DISTANCE LEARNING), did not turn out to be very forceful. The SOCRATES 2000 Evaluation Study suggests that some similarities of concepts grew, but the subprograms continued to live their own life. At the end of this process it seems appropriate that the subprograms kept specific names (such as ERASMUS) and related identities, even though the umbrella term SOCRATES often was substituted on the part of the actors in the field by the use of the subprogram term notably in the case of the oldest subprogram, that is, ERASMUS.

Altogether, the SOCRATES 2000 Evaluation Study painted more a picture of continuity than of change insofar as ERASMUS during the years 1995 to 2000 is concerned. The authors, however, pointed out that the academics and students involved do not consider this as a steady state but rather as an annual experience of a new generation of thousands of students getting stimulated by the study experience in another European country and considering this as one of their most crucial experiences. Moreover, the study points out that university leaders and other actors involved in the decision making observe a continuous growth of the importance of ERASMUS and other European and international activities for the institution as a whole. Thereby, most institutions of higher education consider the European approach of the European Commission as not being in tension to any wider international approach (cf. Teichler, 1998).

Student exchange remained the core element of ERASMUS under the umbrella of SOCRATES. It doubled from the first to the second 5-year period of the 1990s. This happened without major changes in the eyes of the students. Critique of the financial conditions and the bureaucratic context and room for improvement of academic and administrative support and services by the home and host institutions of higher education notwithstanding, the SOCRATES/ERASMUS students of the late 1990s rated the cultural and social learning as exceptional, the academic results as good, and the broadening of reflection as valuable as their predecessors of the early times of ERASMUS did.

This does not mean that the students' responses indicate merely continuity. On the negative side, a drop of the ERASMUS fellowship from covering 89% to 52% on average of the additional costs for the study period abroad is by no means trivial. This decline and the understanding of the European Commission as a predominantly stimulating innovation is likely to reinforce the debate in the next years that already had played a role in recent years—whether the member state of the European Union should take over the bill for students' mobility costs, thus providing opportunities for new support measures on the European level.

On a seemingly positive side, the spread of credit transfer within ERASMUS is widely viewed as a success. The extent to which students were recognized in their study achievements on return increased in tune with the spread of ECTS. The SOCRATES 2000 Evaluation Study, however, indicated that this might be a paper tiger. ERASMUS students of the late 1990s expect that their overall study period will be prolonged as a consequence of the study period abroad to a larger extent than was expected by their predecessors of the early 1990s.

With the inauguration of the SOCRATES program, two major changes of ERASMUS were envisaged. First, curricular innovation should play an increasing role. This should serve the nonmobile students well, and teaching staff exchange was only expected to increase and serve a broader range of purposes. The SOCRATES 2000 Evaluation Study suggests that this policy had many successes in detail, but was not seen after a few years as a major breakthrough. The quantitative expansion of teaching staff exchange was accompanied by the dramatic reduction of the average teaching period abroad, and the activities of curricular innovation need time to deliver.

The second major change was of managerial nature. The institutions of higher education as a whole had to assume the responsibility for all ERASMUS-supported activities and were expected to create more stability as well as to take major strategic steps of embedding their ERASMUS-supported activities into a larger European policy. For these purposes, the risk was taken of discontinuing support for networks of cooperating departments, the traditional backbone of the ERASMUS program. This obviously had led to an increased level of institutional reflection of their state of European and international policies and activities and—at times when one could not necessarily rely anymore on the pioneer spirit of ERASMUS—often to a consolidation of respective responsibilities. But hopes as far as major strategic options are concerned and fears as far as a possible collapse of the academics' involvement in student mobility is concerned were not confirmed to the extent expected when SOCRATES was inaugurated. One can only speculate whether the time was too short between the change of conditions and the period when the SOCRATES 2000 Evaluation Study was con-

ducted to see such changes or whether reality will in fact change substantially less than hoped and feared.

The SOCRATES 2000 Evaluation Study was received by the European Commission very constructively, as an unpublished report shows. The Commission stated that the study provides a consistently valid account of the state of SOCRATES and that most measures for improvement should take off from that basis of information. Of course, the individual measures for improvement suggested by the European Commission are influenced as well from considerations of feasibility and desirability of change. One might be surprised to note that an actor believing to be a very dynamic promoter of change can react on an evaluation providing such a mix of messages in a very balanced way. Or in reverse, one could not be surprised if organizations expected to be steam engines of change react impatiently if a mix of small steps of progress, some failures, and substantial continuity is demonstrated by evaluation. One factor might be salient in explaining the mature way the European Commission now reacts to the evaluation of its activities. From the outset it was obvious that ERASMUS is a multiactor activity: The European actors stimulate quantities and major directions, but a support program by definition has only an indirect influence on the change of higher education. During the years, the character of partial and indirect shaping by the European Commission became more pronounced when the national government developed more outspoken policies for Europeanization and internationalization of higher education, when ERASMUS became more decentralized in the administrative setting, and when the target of the programs shifted more strongly toward curricular innovation. Therefore, the Commission is likely to share the praise or critique put forward by an evaluation more at ease with other actors.

It remains an open question, however, whether this process of ERASMUS moving more and more toward a multiactor setting of shared responsibilities and shared praise and blame for the successes and failures will continue, or whether the European Union again will be expected to become a steam engine for avant-garde innovation in European higher education in select areas, not widely accepted, in need of pioneers, and so forth. As the decision was taken in 1999 for moderate changes of SOCRATES during the period up to 2006, such a strategic decision for the future role of the European Union in the development of higher education in Europe might be on the agenda around 2005.

NOTES

1. The evaluation report was not published.
2. Compare with the bibliography in Maiworm and Teichler (1997).

3. In addition to the major study, three specialized studies were undertaken on European school partnerships (Deloitte & Touche, 2001), involvement of disabled persons (European Agency for Development in Special Needs Education, 2001), and participation of engineering in SOCRATES (Sociedade Portuguesa de Inovacao, 2001).

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