

Public Funding Observatory

2021/2022

Part 1: Sector perspectives on funding

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Introduction

The EUA Public Funding Observatory 2020/2021 was published in two parts for the first time during the pandemic in order to complement the usual data collection with the expectations of the impact of the crisis on funding for universities. This practice is now being continued. This report presents part 1 of the results of the EUA Public Funding Observatory 2021/2022, based on collected insights from national university associations on their expectations in terms of funding (from both public and private sources) and system governance in the medium term (2022-2024).

This report also reflects on the European funding context, in the light of the National Recovery and Resilience Plans submitted by the EU member states under NextGenerationEU and which may result in additional funding and investments that would benefit universities, among others.

The second part of the Public Funding Observatory, enriched with the latest funding data, will be published in the coming months.

A total of 28 national university associations provided quantitative and qualitative feedback to the survey. The following systems are included in the analysis: Austria, Belgium-Flanders, Belgium-French speaking community, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Iceland, Ireland, Italy, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, Switzerland, Turkey, and England and Scotland in the United Kingdom.



Sector expectations for public funding in the next three years (2022-2024)

Universities' expectations regarding public funding in the next three years are encouraging, marked by a lower degree of uncertainty and concern than in 2020.

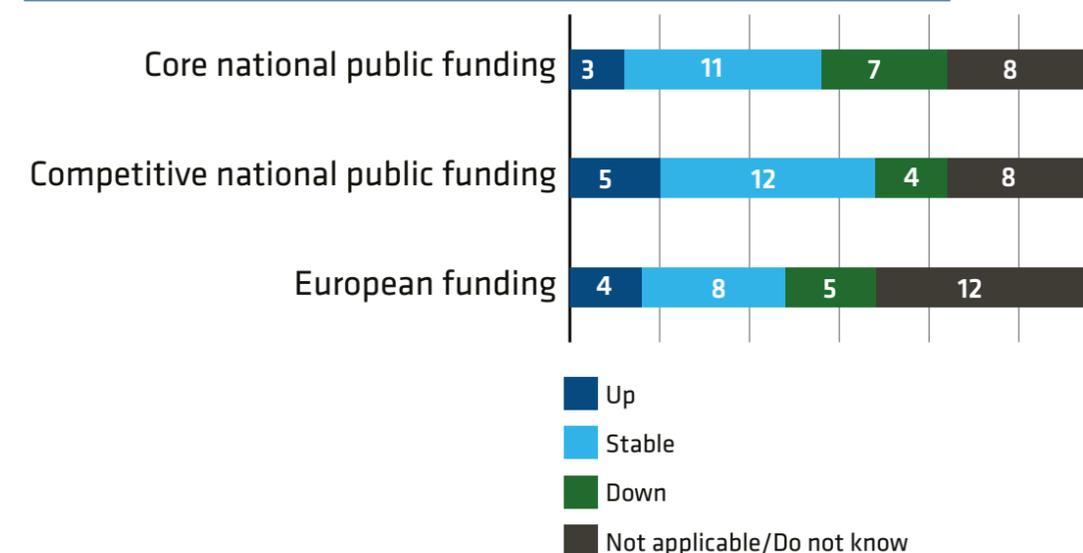
Three quarters of respondents (21) expect that core national public funding will either increase or remain stable for the next three years. The increase may be due to several reasons, depending on the system: either because of an expected growth in student numbers (Netherlands), as an upturn in student grants to enhance equity and access to higher education (Spain), or as a long-awaited funding reform (Ireland).

Several respondents also point to the fact that while they expect the core national public funding to remain stable in nominal terms, it may be affected by growing inflation, and hence prove insufficient to cover the rising costs of higher education.

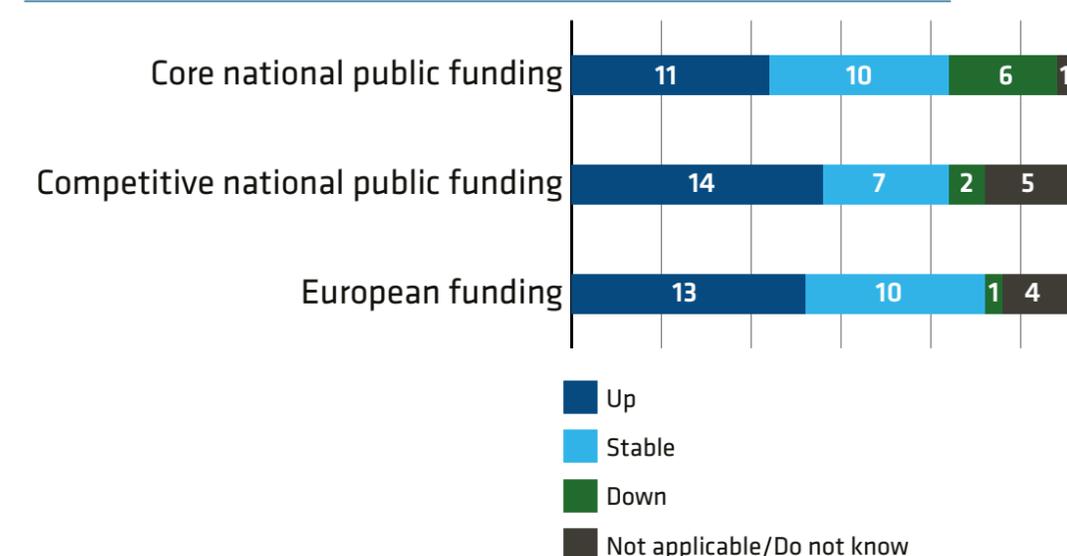
Six systems (BE-nl, CZ, HR, NO, SK and UK-sc) fear that core national public funding will decrease. Reasons include, among others, expected austerity policies (Czechia) and financial cuts due to the pandemic (Croatia).

Compared to 2020, many more systems (50% compared to 17% in 2020) now trust that competitive national public funding will increase. Only two systems (Germany and Poland) expressed skepticism.

Public funding expectations 2021-2023
n=29



Public funding expectations 2022-2024
n=28, Q2 (see Appendices)





“A substantial part of the funding increase will be due to the European funding through the NextGenerationEU funds. In addition, the Spanish universities expect to improve their competitiveness in the new Erasmus+ and Horizon Europe programmes.”

The Conference of the Rectors of the Spanish Universities

“High support for the higher education sector is expected from European sources (like the Recovery and Resilience Facility or European Investment and Structural Funds.”

Czech Rectors Conference

“We expect an increase in European funding for universities in the context of the National Recovery and Resilience Plan and of new European programmes.”

Romanian Council of Rectors

Expectations about European funding (through EU funding programmes) are also optimistic, with 46% of national university associations expecting that this source of funding will further increase, and 36% that it will at least remain stable. However, the fiercely competitive nature of European funding (e.g., the low success rates in Horizon Europe calls) remains a challenge for several of the respondents.

Funding from NextGenerationEU (available only for EU member states) attracted through National Recovery and Resilience Plans was also mentioned as an important additional source of funding, which has the potential to round up universities' budgets, especially in systems where public authorities have cut into the core budget of universities (e.g., Croatia). However, it should be stressed that EU funds cannot be considered as substitutes for national funding.

In terms of access to European funding, Switzerland and the UK face particular challenges. The standstill on the association of Switzerland to Horizon Europe is preventing Swiss universities from accessing funding from the EU. In the UK, while competitive national funding for research is expected to increase, European funding will decrease, given that English institutions are no longer eligible for most EU-funded projects, and are expected to be less active in those programmes where they can still apply.

The uncertainty around public funding remains, in several cases linked to upcoming elections as was mentioned by Portugal and France (particularly, in the latter case, for funding allocated to teaching).

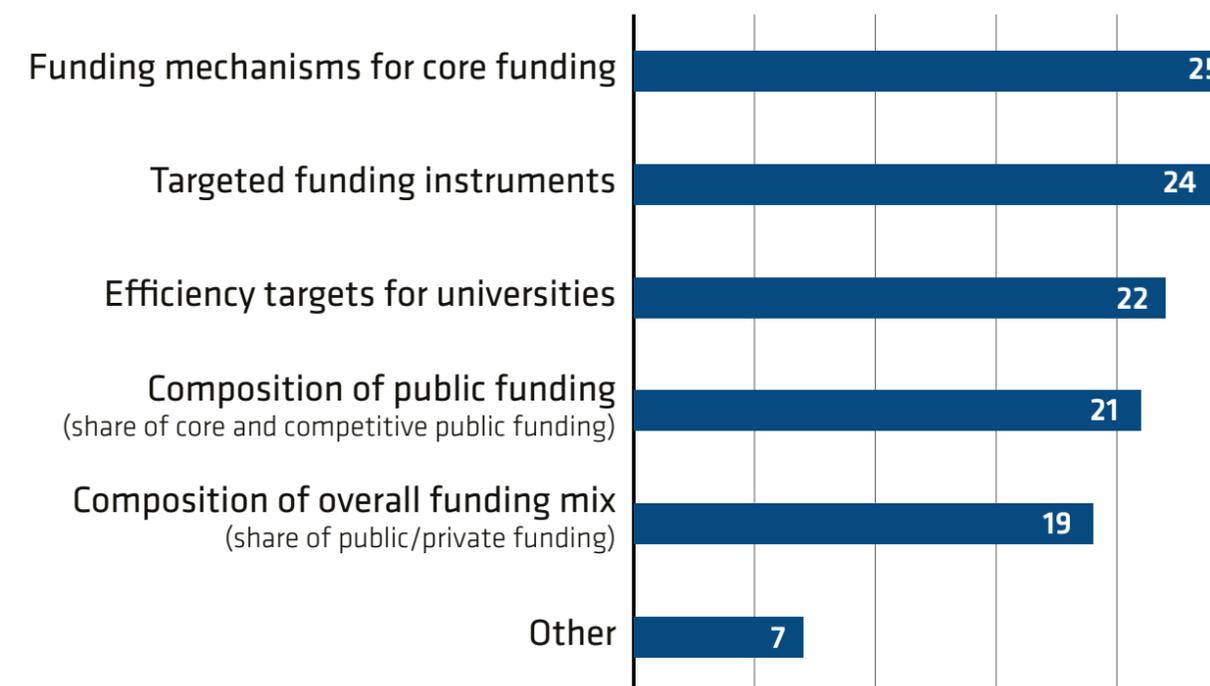
Expected changes in public funding modalities

Compared to the previous iteration of Public Funding Observatory part 1, there is a considerably higher degree of change expected throughout Europe in the funding area in the next three years. In several cases, this is because related reforms were put on hold in 2019-2020.¹ Most expected changes are in mechanisms for core funding (25) and in the use of targeted funding instruments (24).

In terms of mechanisms for core funding, respondents mentioned the introduction of more indicators for the allocation of core funding (Iceland), changes to the funding formula for teaching (Estonia), a revised role of bibliometrics in the funding formula (Denmark), or preparation for the introduction of performance agreements (Slovakia). Changes may also be connected to the focus on innovation and the ambition to expand funds for innovation-related research projects (UK).

More funding earmarked for green research and climate preservation was mentioned by national university associations from Denmark and Sweden. The introduction of new targeted funding instruments for education and RDI activities also features on the Finnish agenda. The National Recovery and Resilience Plans submitted by the EU member states under the post-pandemic EU recovery package NextGenerationEU were also seen by some respondents as instruments for a more targeted funding for higher education.

Expected changes in public funding modalities
n=27, Q4 (see Appendices)



¹ Bennetot Pruvot, E., Estermann, T. (2021), „NextGenerationEU: What do National Recovery and Resilience Plans hold for universities?“, European University Association, p. 17, <https://eua.eu/downloads/publications/nextgen.pdf>



“The underfunding of higher education has driven significant efficiency in higher education in Ireland and the capacity for further efficiencies are highly questionable. It is however likely that an increase in funding as part of a revised funding model will carry additional requirements in terms of outputs or expectations”.

Irish Universities Association

“We expect that improving the efficiency of universities in learning and teaching and general management will be one of the main objectives”.

The Conference of the Rectors of the Spanish Universities

Close to 80% (22) of the university associations also expect changes in efficiency targets for universities.

Despite considerable uncertainty, the composition of public funding (i.e., the share of core and competitive public funding) is also expected to change in a good number of the systems surveyed. Of those that pointed to such change, the trend seems to be greater imbalance between core and competitive funding, with the latter expected to go up, for instance in Belgium-Flanders, Czechia, Hungary and Spain. At the opposite end, as the overall level of public funding falls in Scotland, the relative share of core funding would grow as the decrease in competitive funding is expected to be steeper.

The overall funding mix (share of public/private funding) is generally less expected to change significantly. While the share of private funding is expected to increase in Denmark and

Finland, and continues to represent a significant proportion of the overall funding of Irish higher education institutions, it is foreseen that it will remain stable for the period in Belgium-Flanders, Italy and Sweden. Polish respondents cited the worrying state of the economy as a reason for private funding to probably freeze at the current level or even decrease.

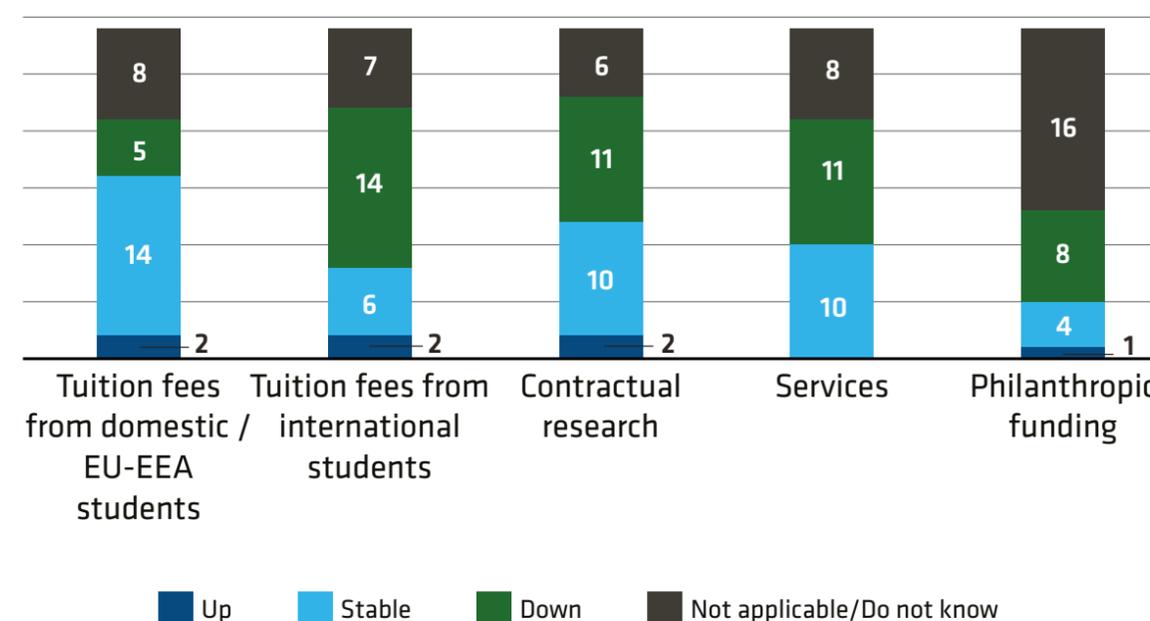
Expected changes in private funding

Among private income sources, just over one third (10) of the university associations expected tuition fees from international students to increase. This picture is very different from the one in 2020, when tuition fees from international students was the income source most expected to decrease, given the very high uncertainty around international student admissions and persisting travel restrictions.² The currently expected increases are due either to larger student cohorts or to higher fee levels for international students. UK students are now charged international student fee levels in EU countries, while they benefitted from domestic/EU student fee levels previously. Increases are expected as well in systems such as Ireland where there are government targets on raising international student numbers, or Scotland where international fees are the main cross-subsidy to meeting the cost of tuition for Scotland-domiciled students.

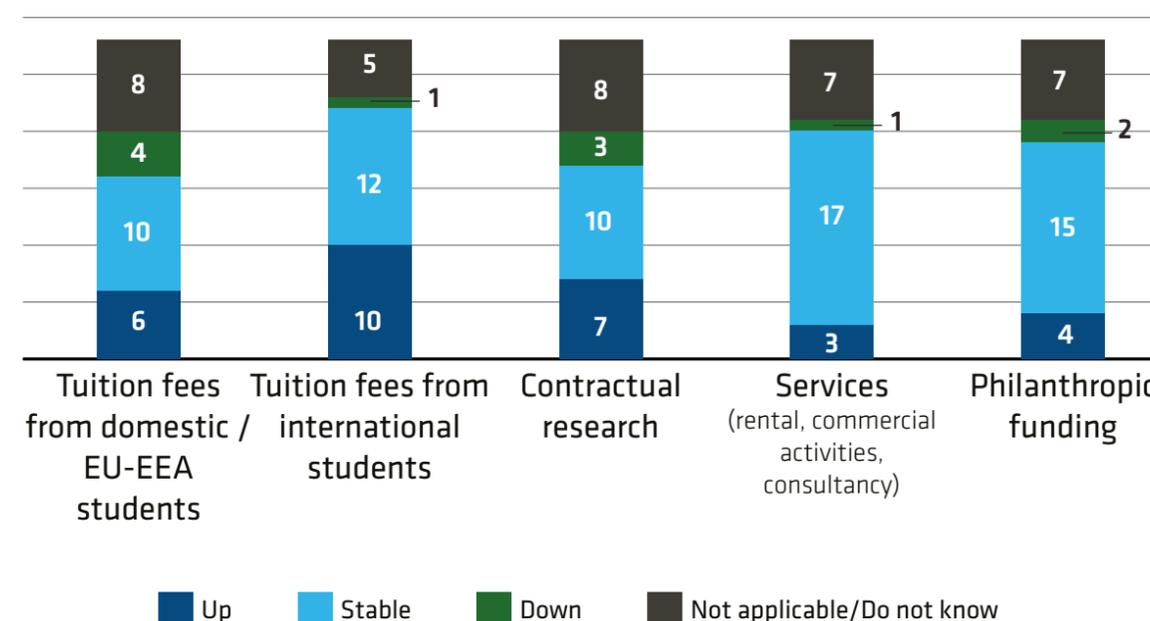
About a third of respondents (10) foresee that tuition fees from domestic/ EU-EEA students will remain stable. In six systems they are expected to go up due to increasing student numbers – for instance in Belgium’s French-speaking community, Ireland, the Netherlands, and Switzerland, or to raising tuition fee levels, such as in Poland where such increase should cover growing inflation.

² See [PFO 2020/2021 Part 1](#), p.25

Expected changes in private university funding in 2021-2023
n=29



Expectations in private funding in 2022-2024
n=28, Q5 (see Appendices)



Only in four systems do sector representatives expect decreasing tuition fee income from the domestic student population, namely Croatia, Scotland, Spain (due to falling student populations and expected reduction in the level of tuition fees) and Romania (diminishing student cohorts and financial impact of the pandemic on the number of students able to cover their tuition fees).

The majority of university associations (20) expect income from services (rental, commercial activities, consultancy) either to grow or to remain stable in the medium term. This is more encouraging than last year when none of the respondents expected revenue from services to go up and where only a third predicted stability.

Two thirds of respondents foresee that philanthropic funding will either go up (4) or remain stable (15) in the coming years. This is more optimistic than last year, when under a fifth of respondents anticipated that philanthropic funding would increase or at least remain stable.

Contractual research is expected to increase in a quarter (7) of the systems surveyed, mainly due to a post-pandemic upsurge in economic growth.

Looking at the entire picture, there is optimism and stability in the medium term, the frequency of expected decreases in all sources of private funding being considerably lower than in 2020. However, with the notable exception of philanthropic funding, overall levels of uncertainty in terms of private funding persist.

Funding from NextGenerationEU

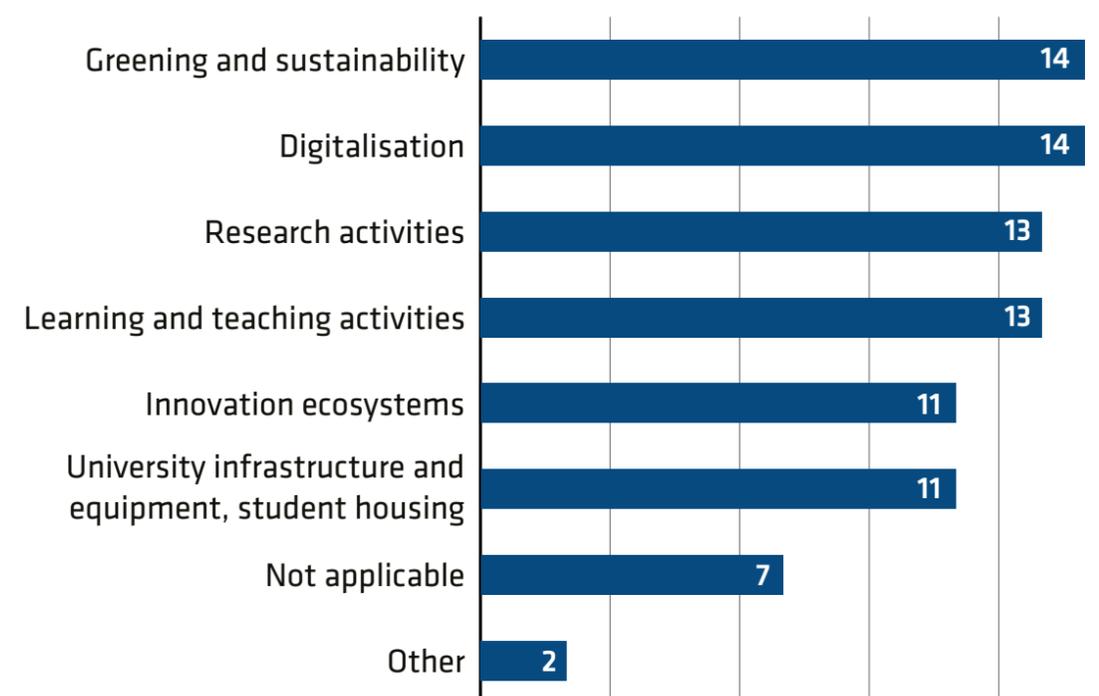
National Plans submitted by EU member states under the Recovery and Resilience Facility may result in additional investments to the benefit of universities, as shown in the recent EUA briefing on the topic.³

Out of the 21 responding associations whose governments submitted a plan, 67% (14) expect money from the NextGenerationEU to be invested in greening, sustainability and digitalisation of the university sector.

The thematic priorities most often chosen are not surprising, given that under NextGenerationEU the national plans have to fulfil concrete investment targets for green transition/climate (37%) and digitalisation (20% of the budget).

Thirteen national university associations also pointed to investments in research activities, as well as in learning and teaching, whereas 11 respondents foresee funding from NextGenerationEU going to innovation ecosystems and university infrastructure and equipment, as well as student housing. All of these areas may also overlap with the greening and digitalisation objectives.

Thematic areas where NextGenEU money are expected to be invested
n=21, Q7 (see Appendices)



³ Bennetot Pruvot, E., Estermann, T. (2021), „NextGenerationEU: What do National Recovery and Resilience Plans hold for universities?“, European University Association, <https://eua.eu/resources/publications/984:nextgenerationeu-what-do-national-recovery-and-resilience-plans-hold-for-universities.html>

The extent to which national university associations were involved in the preparation of the National Recovery and Resilience Plans has been very diverse. It ranged from no involvement at all to extensive consultations and contributions.

Over half of the national university associations said that they were either not invited to participate in the preparation (AT, BE-nl, HR, IE, LU, PL, RO, SE, SK), or that they were only marginally involved (BE-fr, CZ, ES).

In Slovakia, although the national university association was not specifically invited to contribute to the development of the National Recovery and Resilience Plan, it submitted several positions on the matter and participated in the general public consultation. More recently, the association was invited to join as member of the governmental structure in charge of the Plan.

In Spain, the government prepared the National Recovery and Resilience Plan with limited participation from universities. The Conference of the Rectors of the Spanish Universities (CRUE) submitted a report indicating the priorities and needs of the universities and their capacities and opportunities to contribute to the Plan. CRUE has been in contact with different ministries to get involved in projects connected to digitalisation, research and innovation, university infrastructures, ecological transition, training and employment reskilling, among others.

In Czechia, although the involvement of the higher education sector was not significant during the preparation phase of the Plan, relevant communication has been established with the Managing Authority for the implementation phase of the Plan (e.g., preparation of calls).

Nevertheless, six national university associations (EE, FI, FR, IT, NL, PT) confirmed having participated considerably in the preparation of their national plans.

In Finland, universities were invited for hearings on the national plan. On this occasion, the universities agreed with the proposal made by the Ministry of Education and Culture to temporarily increase the number of places available in higher education, and made proposals on the funding targets to be mentioned in the national plan.

In France, there were multiple exchanges between the ministry, the universities and the national university association (France Universités), especially concerning the energy retrofitting of university buildings for which almost all universities submitted project proposals.

Although the **Netherlands** had not submitted its national plan at the time of writing, the national university association was invited to contribute to the preparation of the plan. Universities of the Netherlands (formerly known as VSNU) has joined forces with representatives from the broader knowledge community in the Netherlands, such as the universities of applied sciences and the national science funding organisation. The suggestions were communicated to the relevant national ministries. The national university association remains an important stakeholder also in the implementation of the plans in the field of higher education.

Priority investment needs in the higher education sector

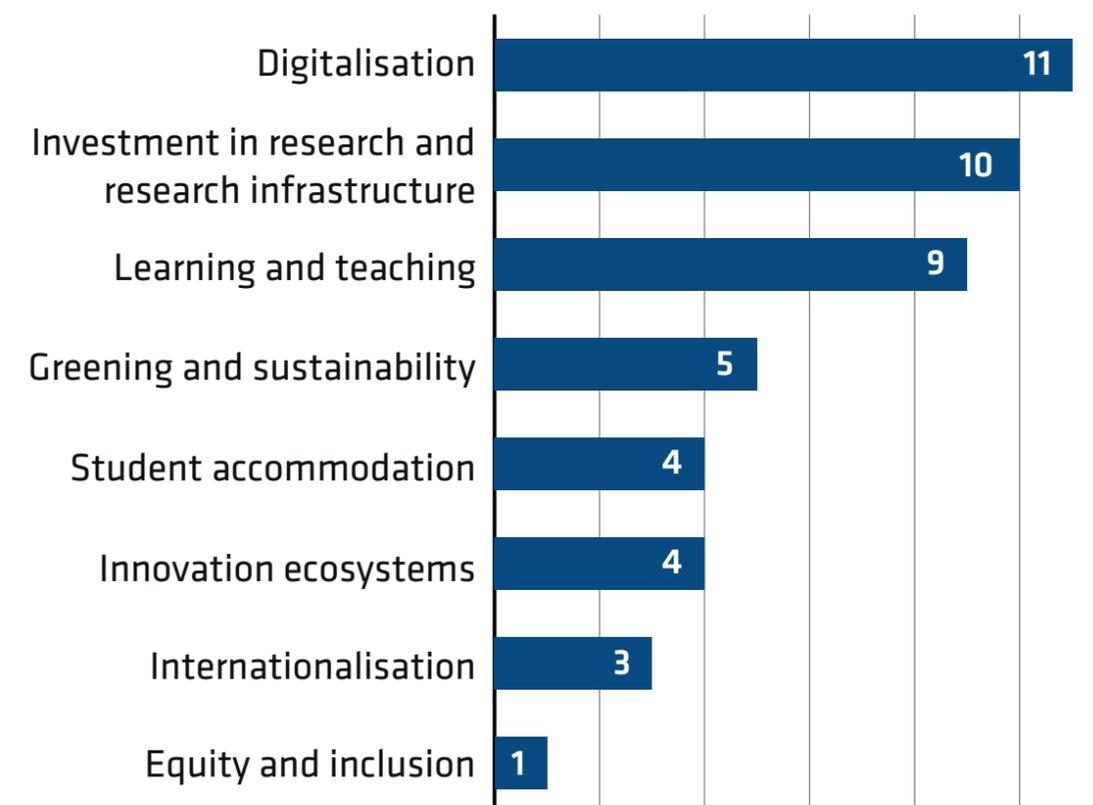
While expectations about the development of public funding are more positive, the needs for investments are growing.

About half of the surveyed national university associations considered the current levels of higher education funding as insufficient. Significant additional core funding is a real priority for the sector, especially in those systems that have witnessed continuous years of underinvestment coupled with increasing student numbers.

Respondents reported declining funding per student as a main concern in several systems, such as in Belgium's French-speaking Community, in France (from €11,190 per student in 2010 to €10,100 in 2020, while student numbers increased by 20%), Ireland (35% decline in the funding per student since 2008) and Sweden.

The sustainability and current levels of core funding are also a concern in Estonia, Finland, Scotland, Slovakia and Spain. In Estonia and Slovakia, this issue is particularly acute regarding funding for teaching and the low salaries of the academic teaching staff.

Priority investment needs
n=27, Q9 (see Appendices)



When it comes to perceived priorities for investment, just as in 2020,⁴ digitalisation continues to be in the lead, being specifically mentioned by 11 national university associations (AT, CH, CZ, ES, HU, IE, NO, PL, PT, RO, TR). The rapid shift to emergency online learning and teaching due to the pandemic revealed many shortcomings at universities when it comes to IT infrastructure, but also to digital competences of students and staff. As online and blended education continue being used in many systems and may become structural features, digitalisation is now perceived as a medium to long-term investment. Universities Norway, for instance, has called for a four-year investment plan in digitalisation starting in 2023.

The second priority for investment concerns research and research infrastructure, including facilities and equipment. According to respondents, such investments are needed to support the quality of education, but also to ensure that breakthrough research is produced to drive economic growth and scientific developments.

Sector representatives also pointed to the need for significant investments for innovation in learning and teaching, including pedagogical staff development, modernisation of teaching infrastructure to meet rising student and market expectations, and to increase the offer of upskilling, reskilling and lifelong learning opportunities provided by universities. Improving the student-teacher ratio was a particular priority in Austria and Hungary.

⁴ See [Public Funding Observatory, Part 1, 2020/2021](#), p. 26

Addressing greening and sustainability was specifically mentioned as an investment priority in Belgium-Flanders, Hungary, Ireland, Serbia and Switzerland. In several cases, such investments had to do with achieving higher energy efficiency, setting up an energy policy plan including renewable energy and energy retrofitting of aging buildings. When it comes to greening the campus, investment needs should not be underestimated: general underfunding remains the main obstacle to the implementation of greening measures at universities.⁵ Because of the scale of the required upfront investments, meaningful greening initiatives are particularly difficult to deploy on campus.

National university associations from Hungary, Ireland, Luxembourg and the Netherlands considered student accommodation as key priority. In Ireland, the lack of supply is exacerbated by the wider housing crisis. In the Netherlands, student accommodation has been challenging to secure for the past years already, with the shortage especially affecting international students.⁶

Other investment priorities mentioned to a more limited extent included innovation ecosystems, internationalisation and enhancing equity and inclusion.

⁵ Bunescu, L., Estermann, T. (2021), "Greening in European higher education institutions. A governance, funding and efficiency perspective", European University Association, p. 6, <https://eua.eu/resources/publications/1001:greening-a-governance-funding-and-efficiency-perspective.html>

⁶ ICEF Monitor (2021), "Significant student housing shortages reported in the Netherlands", <https://monitor.icef.com/2021/09/significant-student-housing-shortages-reported-in-the-netherlands/>

New opportunities for efficiencies in the higher education sector

Digitalisation was most frequently seen as a source for greater efficiencies at universities, notwithstanding the need for additional investment to sustain digital transformation. Digitalisation has the potential to increase efficiency in all areas of university work, from learning and teaching to research, university administration, improving the service offer and delivery, particularly to non-traditional students, via more flexible delivery options.

Greening and achieving environmental sustainability were seen as ways for reaching greater efficiencies. The connection between greening the campus and achieving efficiency was detailed in a recent EUA publication on the topic.⁷ For instance, a greener campus means, among others, achieving energy efficiency through building and renovation works.

In addition to building green, sharing services and assets within the institution and with other organisations can generate efficiency.

Institutional autonomy was highlighted as prerequisite that could generate further efficiencies in two systems. In Spain, further flexibility and institutional autonomy were seen as critical, with implications on the research and teaching missions of universities, but also on the management processes, such as hiring of academic staff.

⁷ Bunescu, L., Estermann, T. (2021), "Greening in European higher education institutions. A governance, funding and efficiency perspective", European University Association, <https://eua.eu/resources/publications/1001:greening-a-governance,-funding-and-efficiency-perspective.html>



In Flanders (Belgium), KU Leuven, in partnership with several university colleges, pooled resources and created a joint platform that offers lifelong learning opportunities (<https://www.ikblijfbij.be/over-ons>). The University of Antwerp, the University of Ghent and the Vrije Universiteit Brussel also joined forces and offer a platform with options for further training (<https://nova-academy.be/>).

In Finland, the universities and universities of applied sciences are working together towards "Digivision 2030". In this large-scale national initiative, a joint digital system will be built, which will enable more flexible study paths, combining studies from various education providers. It will also help universities to increase collaboration in organising studies, leading to more efficient activities.

In Sweden, the tasks and regulations set by public authorities were viewed as burdensome and taking away resources from core university missions, aggravating inefficiencies.

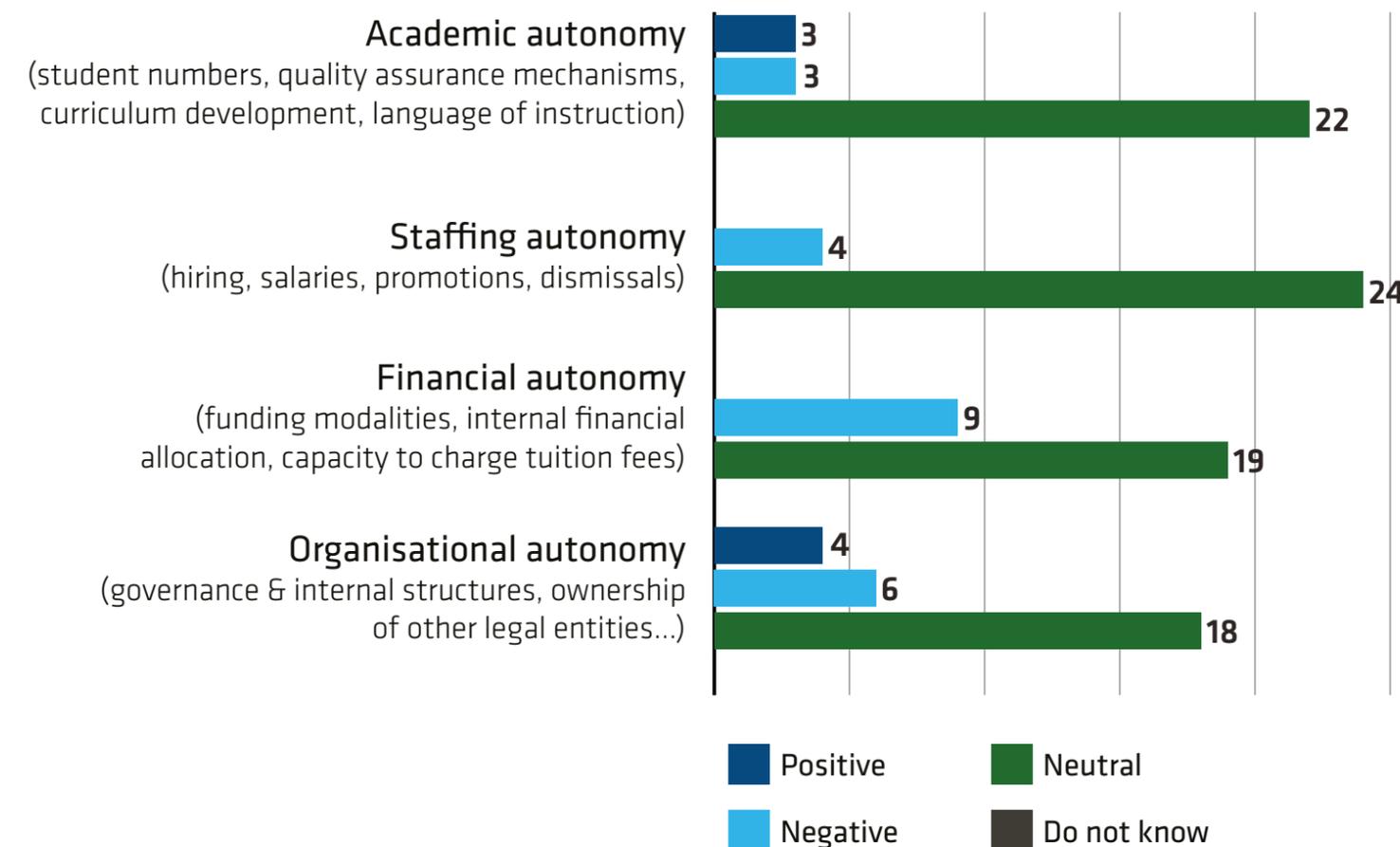
In some cases, responding associations found it hard to identify areas in which the sector could generate further efficiencies. This is the case in Ireland and in the Netherlands, where considerable work on the matter has already been carried out and the scope for greater efficiency is reduced due to limited budgets. The ongoing pandemic also precludes work for achieving further efficiencies, as universities prepare to enroll students who attended entire upper-secondary level education during Covid-19. In anticipation for this, universities foresee needs for additional investment in remedial programmes in order to reduce learning gaps, but also in support mechanisms for student well-being, including mental health.

Impact on university autonomy

Consistent with last year, most national university associations considered that the pandemic had little to no impact on university autonomy, with a big majority of respondents remaining “neutral” when it comes to the effects of Covid-19 on staffing autonomy (86%), academic (79% of respondents), financial (68%) and on organisational (64%) autonomy.

The most visible impact of the pandemic was on financial and organisational autonomy, with almost a third of respondents (9) pointing to a negative impact of the pandemic on financial autonomy (notably on funding modalities and internal financial allocation). During the period considered, additional public funding was provided specifically to address issues arising from the pandemic. National university associations from Ireland and Sweden mentioned that such state funding has been more restrictive, targeted or directed, with an inevitable impact on financial autonomy.

Impact of Covid-19 on university autonomy
n=28, Q11 (see Appendices)



On the one hand, slightly over a fifth of respondents (6) pointed to negative externalities of Covid-19 when it comes to organisational autonomy. This is mostly because state intervention was more visible during the pandemic, with central authorities (i.e., governments) being more directive in terms of university operations, for example in limiting on-site campus activities. On the other hand, four respondents (BE-fr, ES, FR, PT) reported higher organisational autonomy during the pandemic, with the crisis being seen as a testing board for institutional autonomy. The capacity to re-organise themselves also increased the trust of public authorities in universities, potentially reducing the risk of more severe interventions and restrictions than necessary.

Three systems (BE-fr, ES, FR) pointed to positive developments in terms of academic autonomy, mainly due to the possibility of moving to online learning and teaching and adapting their curriculum accordingly. In Spain, for instance, in the first months of the pandemic universities were able to change the processes and circumstances of curriculum development and evaluation.

Impact on system governance

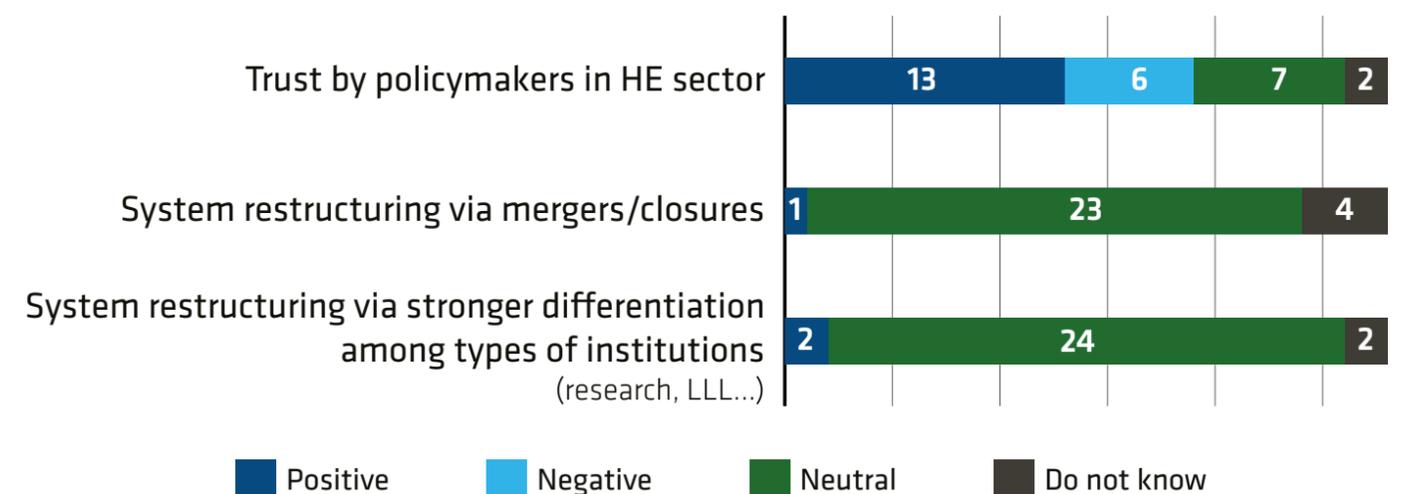
In terms of system governance, the most visible impact of the pandemic was enhanced trust by policymakers in the higher education sector. Thirteen national university associations (AT, CH, DE, ES, FI, FR, HR, HU, IE, IS, LU, PT, SE) considered that trust of policymakers in higher education institutions increased during the pandemic. This is in line with the feedback received in 2020, when 12 national university associations (out of 29) reported a greater level of trust in the higher education sector.⁸ Research-informed policy making demonstrated in real and meaningful terms the importance of research in addressing major societal challenges and increased the trust of policymakers in the higher education sector.

Apart from Croatia, system restructuring via mergers or closures is not seen as connected to challenges evidenced by the pandemic. However, the topic comes up in other national recovery and resilience Plans (i.e., Latvia).

In Norway and Croatia, system restructuring via stronger differentiation among types of institutions is being discussed. The topic has also been tabled in Estonia, not due to the Covid-19 pandemic, but given the ongoing discussions regarding core funding for teaching.

In Ireland, system restructuring was under way prior to Covid-19 and was not significantly affected by the pandemic.

Impact of the pandemic on system governance
n=28, Q13 (see Appendices)



While the crisis may have helped to differentiate research intensive universities from other higher education institutions, the system restructuring which is on-going with the designation of Technological Universities aims among other things to increase the research intensity of those institutions.

⁸ See [PFO 2020/2021, part 1](#), p. 29

Crisis management

The majority of national university associations believed that the pandemic has been generally well managed in their respective systems, bearing in mind the constantly evolving circumstances and the overall uncertainty.

The adequacy of measures was ensured through a collaborative approach between the relevant national and regional authorities, national university associations and higher education institutions. Where applicable, the increased collaboration and coordination ensured a common principles-based approach to the key challenges arising from the pandemic, whilst allowing for local flexibility.

In several systems, national university associations played an intermediary role (between the national authorities and higher education institutions) as well as a facilitator role, enabling exchange and information sharing across the university sector, leading to better and more coordinated decision-making.

However, some respondents pointed to decisions at the national level that were often changed, unexplained and sometimes contradictory, with direct impact on the operations of the higher education sector.

What worked well?

Switching to online learning and teaching in a very short period of time

High adaptation of universities to the new circumstances, including adjustment of their educational offer, student assessment and admissions, but also administrative digitalisation

Autonomous handling by universities of health measures set by national, regional and local authorities

Peer learning and collaboration among higher education institutions.

What could have been/could be further improved?

Support for students' mental health and well-being

Implementation of a robust risk management system

More evidence-based policy making

Alleviating the digital divide, preventing and mitigating the increased inequalities among students generated by the Covid-19 crisis

More financial support to universities for organising distance learning and for helping the academic staff to cope with hybrid learning as well as for improving their online teaching skills

Greater involvement of university specialists, which in some systems could have helped in raising the general level of trust in response to the pandemic.

Key messages

1

Sector projections for public funding are encouraging, marked by less uncertainty and concern compared to 2020. Core national public funding is generally expected to either increase or remain stable for the next three years, however with concerns over the impact of rising inflation levels and potential austerity measures.

2

A great majority of national university associations expect changes in funding mechanisms, both for core funding and in the use of targeted funding instruments.

3

Compared to 2020, more systems now expect that competitive national public funding will increase.

4

Expectations about European funding are positive, with NextGenerationEU funds considered as a potentially important additional source of revenue for universities. Digitalisation and greening & sustainability are the two thematic areas where NextGenerationEU is most expected to invest.

5

Most national university associations did not participate at all or participated only to a limited extent in the preparation of the National Recovery and Resilience Plans, submitted under NextGenerationEU.

6

Tuition fees paid by international students are the private income source most often expected to increase in the next three years. This picture is very different from 2020, when they were the income source most expected to decrease, given the very high uncertainty around international student admissions and persisting travel restrictions.

7

Uncertainty in terms of projections for private funding remains considerable, with the exception of philanthropic funding, where compared to 2020 there is a significantly higher degree of stability. The highest levels of uncertainty remain around tuition fees from domestic/ EU-EEA students and contractual research.

8

Securing additional core funding remains an utmost priority in about half of the systems surveyed, especially in those experiencing a constant decline of funding per student for the past years.

9

Just as in 2020, digitalisation continues to be the main priority for investment. Digitalisation was most frequently seen as a source for greater efficiencies at universities, notwithstanding the need for additional investment to sustain digital transformation.

10

The impact of the pandemic on university autonomy remains limited, with the most visible effects on financial and organisational autonomy. During the pandemic, national public funding has been more restrictive and targeted, with central authorities also being more directive in terms of university operations.

11

Most national university associations considered that the pandemic has been well managed in their respective systems. The adequacy of measures was ensured through a consultative and collaborative approach between the relevant national authorities, national university associations and higher education institutions.

12

Almost half of the national university associations believed that trust by policymakers in higher education institutions increased during the pandemic, as the national policy responses to the pandemic were greatly informed by research.

Conclusions and recommendations

CONCLUSIONS

Although sector projections for public funding are rather optimistic compared to 2020, the crisis will continue to affect universities, with concerns over rising inflation levels and possible austerity measures in some European countries.

European funding, such as NextGenerationEU, can play an important role for universities in helping them to become more digital, green and sustainable. Likewise, European funding enables universities to support general societal progress in the transitions towards greener and more digital environments. The inclusion of the higher education sector in the implementation and monitoring of the National Recovery and Resilience Plans is therefore a strategic policy choice.

The responses to the pandemic were greatly informed by research derived from the higher education sector. The post-pandemic recovery will likewise require the involvement of university specialists in finding solutions to overcome the crisis.

RECOMMENDATIONS

European and national authorities must consider long-term ambitious investments in higher education for a sustainable post-pandemic economic recovery. Commitment to sustainable public funding is needed for universities to address the current and future health challenges, remain competitive internationally and prepare graduates with skills and competences relevant for a fast-evolving labour market.

Governments should also consult with national university associations, as sector representatives, on the implementation of their Recovery and Resilience Plans, which could be an important additional source of funding for universities, especially in systems where public authorities have cut into the core budget of universities.

Policy makers should ensure that universities have sufficient autonomy to develop internal financial allocation mechanisms and implement institutional strategies according to their missions and objectives.

Universities should strive to offer continuous professional development opportunities (including leadership development programmes) to their staff on, among other things, digital transition and greening of their campuses.

The pandemic showed that universities must develop risk assessment strategies and crisis management plans as part of institutional operation planning in order to respond to unforeseen events promptly and efficiently.

Appendices

Survey questions

Q1: Please indicate here your personal details.

Q2: What are your expectations regarding public funding for the next three years (2022-2024)?

Q3: Please explain why you expect such developments.

Q4: Do you expect changes in the next three years (2022-2024) in the following public funding modalities: funding mechanisms for core funding; targeted funding instruments; efficiency targets for universities; composition of public funding; composition of overall funding mix; other? Please describe the expected changes.

Q5: How do you expect private funding (income from private sources) to evolve in 2022-2024?

Q6: Please comment on your choice. Regarding the point on tuition fees, please let us know if the expected change in amount is due to an increased/decreased student cohort or because of an increased/decreased fee level.

Q7: National Recovery and Resilience Plans submitted by EU member states under the NextGenerationEU programme may result in additional university funding and investments that would benefit universities, among others. In your higher education system, in which thematic areas do you expect money from the NextGenerationEU programme to be invested in?

Q8: Please comment on how you were involved in the preparation of the National Recovery and Resilience Plan that your country submitted under the NextGenerationEU programme and how you intend to follow up on its implementation.

Q9: In your opinion, what are the priority investment needs in your higher education system? Please explain how you expect these needs to be met.

Q10: In your opinion, in which areas could the sector generate further efficiencies?

Q11: In your opinion, how has the Covid-19 pandemic affected university autonomy in your country?

Q12: Please comment on your choice.

Q13: In your opinion, has the Covid-19 pandemic been having an impact on system governance in your country?

Q14: Please comment on your choice.

Q15: More generally, please let us know how the Covid-19 pandemic was managed in your system. Please refer to the adequacy and effectiveness of measures taken at both national and institutional levels. What worked well? What could have been/could be further improved?

Q16: Please provide any additional comments on the topics covered in this questionnaire.

List of national university associations

Universities Austria (UNIKO)	AT	Universities of the Netherlands (UNL)	NL
Flemish Interuniversity Council (VLIR)	BE-nl	Universities Norway	NO
Rectors' Conference, French Community of Belgium (CREF)	BE-fr	Conference of Rectors of Academic Schools in Poland (KRASP)	PL
Croatian Rectors' Conference (CRC)	HR	Portuguese National Conference of Rectors (CRUP)	PT
Czech Rectors Conference	CZ	Romanian Council of Rectors	RO
Universities Denmark	DK	Conference of the Universities of Serbia	RS
Universities Estonia	EE	Slovak Rectors' Conference	SK
Universities Finland (UNIFI)	FI	The Conference of the Rectors of the Spanish Universities (CRUE)	ES
France Universities	FR	Association of Swedish Higher Education (SUHF)	SE
German Rectors' Conference (HRK)	DE	swissuniversities	CH
Hungarian Rectors' Conference	HU	Turkish University Rectors' Conference	TR
Icelandic Rectors' Conference	IS	Universities UK (UUK)	UK/UK-en
Irish Universities Association (IUA)	IE	Universities Scotland	UK-sc
Conference of Italian University Rectors (CRUI)	IT		
University of Luxembourg	LU		

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