



Deutscher Akademischer Austauschdienst
German Academic Exchange Service

DAAD
Working Paper

COVID-19 and the impact on international student mobility in Germany

Results of the second DAAD survey of International Offices in the winter semester 2020/21

March 2021



Table of contents

1 Introduction.....	5
2 Methodology	7
3 The COVID-19 pandemic at German universities: General effects and measures	9
4 Effects and measures for international students in Germany	14
5 Effects and measures within the framework of international university marketing.....	19
6 Effects and measures relating to the international mobility of students from Germany	22
7 Digitalisation and virtual cooperation.....	25



SUMMARY

1. German universities are optimistic about the future: more than half of the respondents (51%) expect that the importance of internationalisation at their university will hardly change as a result of the COVID 19 pandemic, a good fifth (21%) even expect its importance to increase, and only 5% expect it to decrease. A clear majority of almost three quarters of the universities also expect a rapid recovery of (physical) international student mobility to the previous level after the lifting of the pandemic-related travel restrictions.
2. Most universities are also optimistic about the prospects for Germany as a place to study: just under one-third (32%) of the universities assume that Germany's attractiveness as a host country for international students has so far tended to increase or even increased significantly in comparison to other important host countries as a result of the COVID 19 pandemic. Only just under a tenth (9%) of the universities assume that the pandemic has had a negative effect.
3. 80% of German universities started the winter semester 2020/21 with a mixed model of face-to-face and virtual teaching, only 16% with purely virtual teaching. However, due to the development of the pandemic, only a good 41% of universities stuck to the mixed model until the end of the semester; the remaining 40% switched to purely virtual teaching in the course of the semester.
4. German universities switched their examinations from face-to-face to online in the winter semester 2020/21 much more frequently than in the summer semester 2020. In the winter semester, more than four out of ten universities (41%) reported that they had switched at least every second examination from face-to-face to online mode. One in five universities (20%) even reported that they had conducted all or virtually all examinations online.
5. At almost two-thirds (63%) of the universities, international students were unable to enter Germany in the winter semester, despite having been admitted, because they did not receive a visa. This problem mainly affected regular students (with the intention of completing their degree in Germany), with over a third (36%) of the universities reporting that at least half of these students did not receive visas. In the case of guest and exchange students, this finding only applied to a fifth (21%) of the universities. Extrapolated, around 14,700 international regular students and around 2,300 guest and exchange students did not receive a visa for their studies in Germany. According to the universities surveyed, students from India, Iran, Pakistan, Bangladesh, Nigeria and China were particularly affected by this problem. Compared to the summer semester 2020, however, students from China, Turkey, Russia and Italy in particular were



SUMMARY

less frequently affected by entry problems.

6. Almost two out of three universities (62%) cancelled international business trips for marketing purposes (e.g. participation in university fairs abroad). Welcome events (37%) and university marketing events (36%) in Germany were each cancelled at a good third of the universities, which is significantly less than in the summer semester. As in the summer semester 2020, the response was mainly virtual welcome events (74% of the universities surveyed) and increased online marketing (40%). The proportion of universities that did not implement any such pandemic-related special measures was significantly lower in the winter semester (16%) than in the summer semester (42%).
7. Only 5% of German universities have discontinued all study abroad and exchange programmes in the winter semester 2020/21. In the summer semester, this share was still at 22%. Almost two-thirds of the universities (62%) discontinued no programmes at all in the winter semester, and another third (33%) only discontinued certain programmes.
8. Almost all universities state that some of the students who had planned a study-related stay abroad for the winter semester 2020/21 and the summer semester 2021 have cancelled or postponed it due to the COVID 19 pandemic. In each case, about half of the universities assume that the cancellation rate for these students is 50% or more.
9. 34% of universities report a decline in interest among their own students in study-related stays abroad in the summer semester of 2021 compared to the summer semester of 2020, while 24% of universities report an increase in interest. For the winter semester 2021/22, 43% of universities currently expect an increase in interest in such stays compared to the last winter semester and only 15% expect a decrease in interest.
10. As a result of the COVID 19 pandemic, a good quarter of universities (26%) have entered into new, virtual cooperation agreements with universities abroad, e.g. to enable students to participate digitally in their courses. The most frequent partners were universities in the USA, Finland and Canada.
11. Half of the universities (50%) assume that the importance of digital elements and services in internationalisation of higher education will remain similar after the end of the COVID 19 pandemic as it was during the COVID 19 pandemic, and just under one fifth of the universities (19%) even expect their importance to continue



SUMMARY

to increase. A clear majority of 71% of universities also believe that the increased importance of digital elements and services in internationalisation of higher education will lead to an overall increase in the workload of the International Offices (e.g. through increased coordination efforts).

12. Almost every second International Office attests to the strong or even very strong commitment of the management (47%) and the teaching staff (46%) of their university to international students in the context of pandemic management. In contrast, the International Offices are much more critical of the Studierendenwerk at some universities. Although their commitment to international students in the context of pandemic management is rated as strong or very strong at a good four out of ten universities (43%). At the same time, however, more than a third (36%) of the international offices attest that the respective Studierendenwerk has no or hardly any commitment to international students at their own university.

1 Introduction

The COVID 19 pandemic has led to massive cuts in the everyday life of German universities and their internationalisation activities. Due to the temporary closure of almost all attendance programmes at universities in the 2020 summer semester and the international travel restrictions, international student mobility in Germany has been particularly hard hit by these effects. The DAAD therefore conducted a survey among the International Offices of German universities between the end of April and mid-May 2020, the results of which were published in June 2020. The survey captured the impressions and experiences of the university staff surveyed shortly after the start of the postponed summer semester.

After the development of the pandemic had initially subsided after the first wave in spring 2020, the second Corona wave occurred in Germany shortly before the start of the (also postponed) winter semester. Many universities that had optimistically started the winter semester with a mixture of face-to-face and online teaching therefore had to switch again to almost purely online operation shortly after the start of the semester. In order to be able to measure the experiences with this second Corona semester and its effects on the internationalisation efforts of the universities, the DAAD once again conducted a survey among the International Offices of German universities in the second half of February 2021. A large number of the questions were taken over from the first survey in the summer semester in order to be able to examine the development with regard to these aspects. In addition, some new questions were added, especially on the topic of "digitalisation and virtual cooperation".

6

This working paper deals - as did the working paper on the previous survey - on the one hand with the general impact of the COVID-19 pandemic on teaching at German universities in the winter semester 2020/1 and the presumed impact on the next two semesters, as well as the associated challenges for university staff. However, the analysis focuses once again on the effects for international student mobility in Germany, i.e. on the one hand the consequences for international students who may not have been able to take up or continue their studies in Germany as planned, have had to cope with changed teaching and living conditions or are currently unable to return to their home country. In addition, the international higher education marketing of German universities and the situation of domestic students in Germany are also taken into account. The latter are also currently facing previously unknown challenges in implementing their study-related stays abroad or planning these stays.

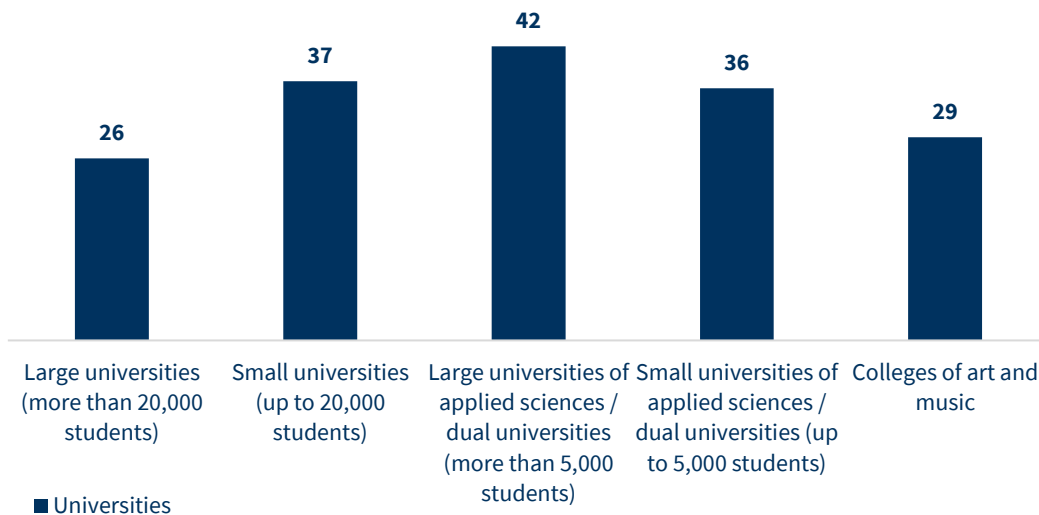
When interpreting the findings, it should be noted that they refer to the specific period of the survey and that the universities' assessments of certain questions, in particular their assessments of the coming semesters, may have already changed again since then. The DAAD therefore plans to conduct another repeat survey at the end of the 2021 summer semester.

2 Methodology

The survey was addressed to the heads of the International Offices and International Offices of the 268 HRK member universities and was conducted by the DAAD from 15 to 26 February 2021. A total of 171 universities completed the questionnaire in full (net response rate: 64%), which corresponds almost exactly to the response rate for the first survey in the summer semester (173 universities or 65%). For the survey and evaluation, the universities were divided into five so-called clusters, which are also used within the framework of the HSI Monitor project¹:

- Large universities (more than 20,000 students);
- Small universities (up to 20,000 students);
- Large universities of applied sciences (more than 5,000 students);
- Small universities of applied sciences (up to 5,000 students);
- Colleges of art and music.

Fig. 1: Distribution of participating universities according to university cluster



The average number of international students in the various university clusters varies greatly (Federal Statistical Office, student statistics for the winter semester 2018/19):

- Large universities: \bar{x} 3.943, range: 1.159 to 10.843
- Small universities: \bar{x} 911, range: 11 to 2.715
- Large UAS/DU: \bar{x} 909, range: 126 to 3.058
- Small UAS/DU: \bar{x} 237, range: 10 to 930
- Colleges of art and music: \bar{x} 223, range: 2 to 1.155

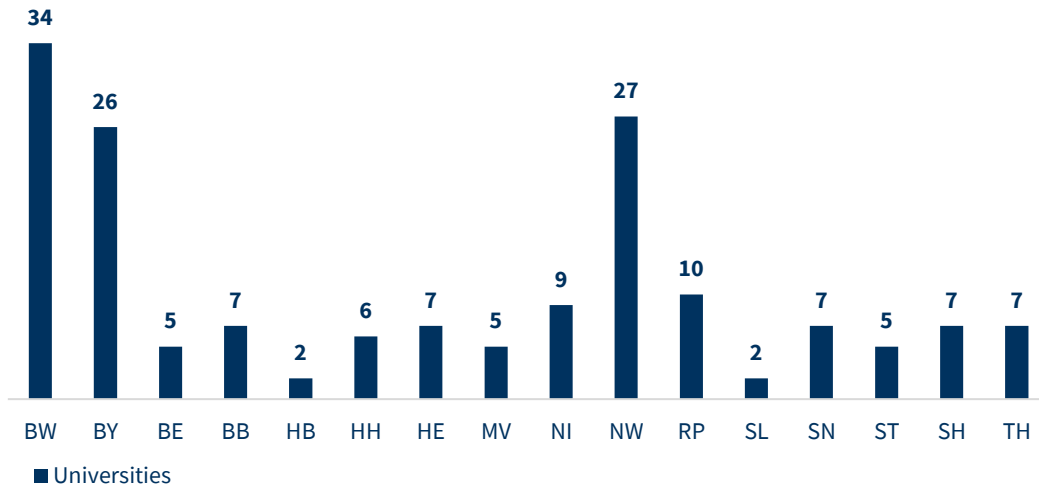
For reasons of clarity, however, the main part of the report does not show the individual cluster values; instead, these are listed in a separate table appendix. The total values for all universities presented in the main section were calculated using the weighted cluster values. The cluster distribution in the population of all 268 HRK member universities served as the basis for the weights. However, since the cluster distribution in the sample of 171 participating universities was very similar to that in the

¹ See: www.hsi-monitor.de

population of all universities, only minor weightings were necessary when calculating the overall values (see Appendix).

There was also a very balanced distribution among the participating universities regarding the federal states². The data basis can therefore be considered very meaningful regarding the entirety of the HRK member universities.

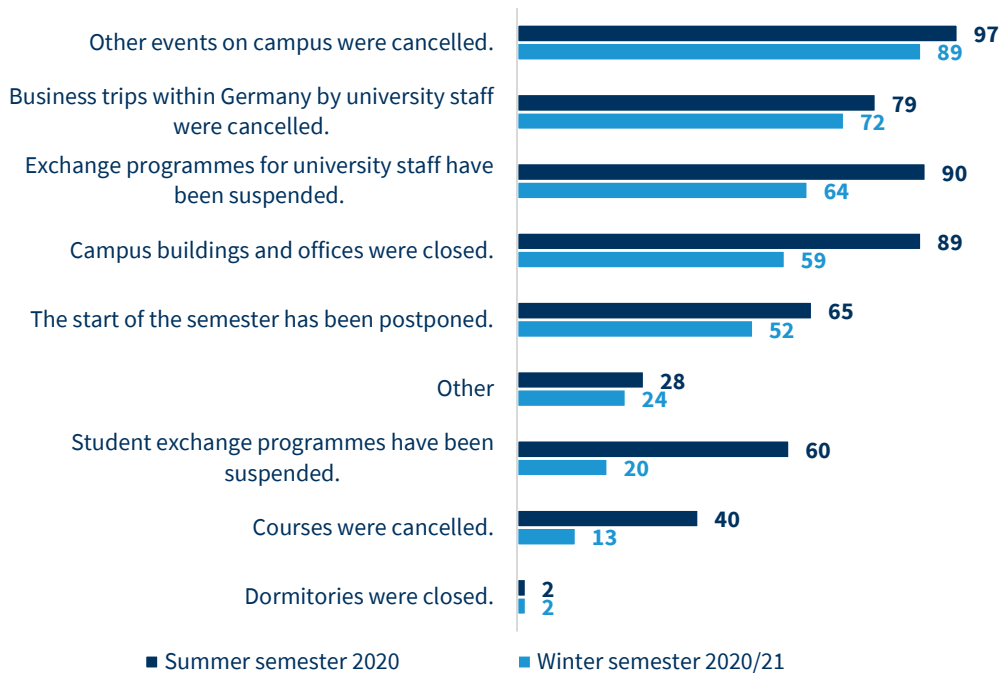
Fig.2: Distribution of the universities participating in the study by federal state (n = 166)



² For technical reasons, only 166 of the 171 universities that answered the questionnaire in full can be listed in the distribution by federal state.

3 The COVID-19 pandemic at German universities: General effects and measures

Fig 3: Consequences of the COVID 19 pandemic for universities in the summer semester 2020 and winter semester 2020/21 (in %)

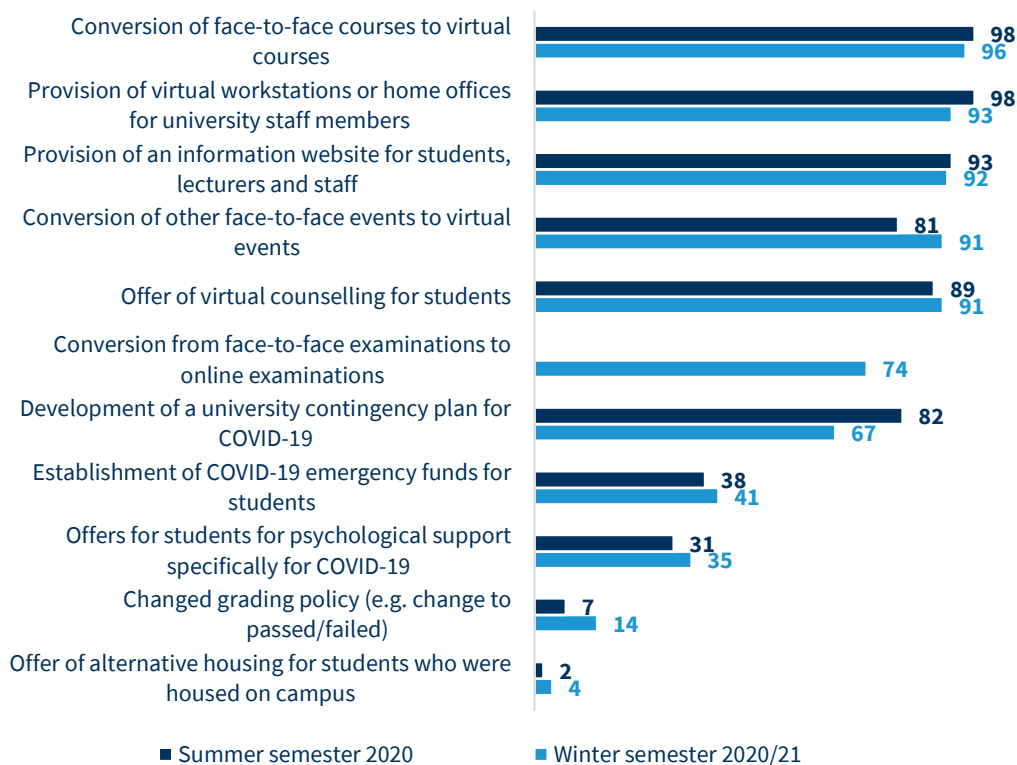


Question wording: Which of the following consequences of the COVID 19 pandemic apply to your university?

The COVID 19 pandemic also had a serious impact on the range of courses and activities offered by German universities in the 2020/21 winter semester. Non-teaching events were cancelled at around 90% of the universities. Business trips within Germany were apparently reduced to a minimum, with just under three quarters (72%) of the universities reporting cancellations here, although this is often also likely to be due to cancellations by the respective local organisers. Campus buildings and offices were closed at around 60% of the universities (64%) and exchange programmes for university staff were cancelled (59%). Half of the universities postponed the start of the winter semester, mostly on the basis of national regulations.

At the same time, compared to the previous summer semester, these measures were taken at a smaller proportion of the universities. This applies in particular to the suspension of exchange programmes for students, which only 20% of the universities reported (summer semester: 60%), as well as the cancellation of courses (13% in the winter semester vs. 40% in the summer semester). A certain routine in dealing with the pandemic already seems to be noticeable here. As in the summer semester, only 2% of the universities reported dormitory closures, so they remain a rare exception.

Fig. 4: Support measures of the universities for students and staff in response to the COVID 19 pandemic since its beginning (in %)



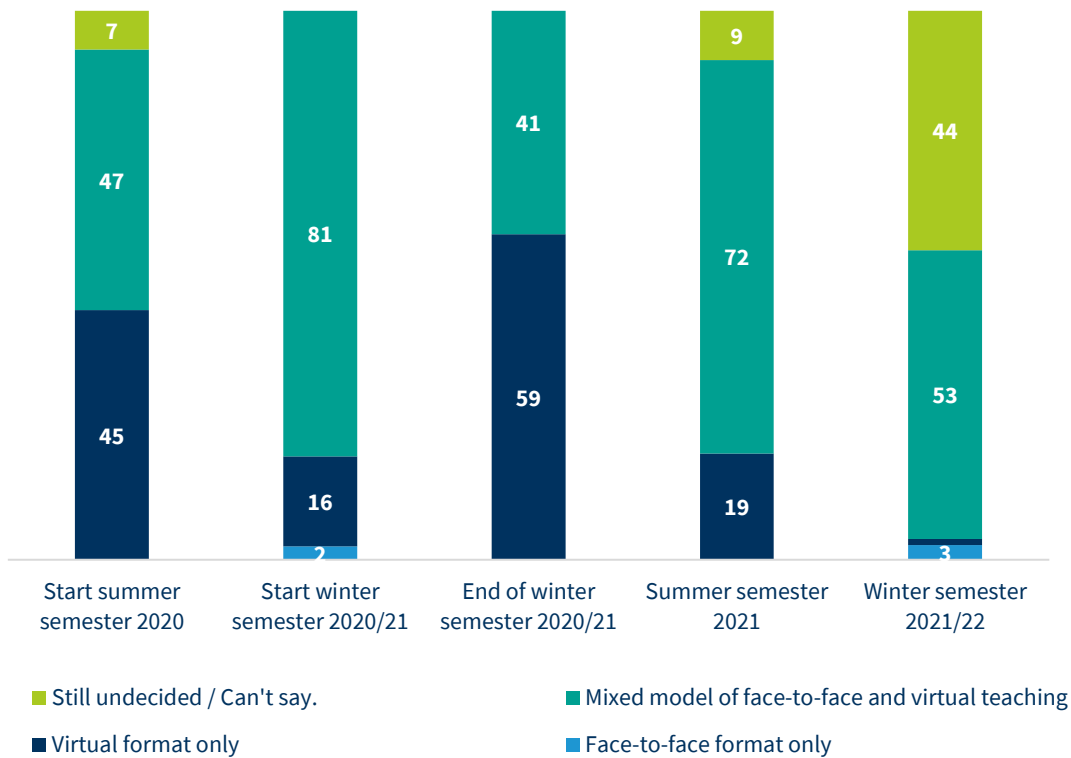
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Question wording: Which of the following measures has your university taken in response to the COVID 19 pandemic to support German and international students and staff since the pandemic began?

Since the beginning of the COVID 19 pandemic, more than nine out of ten German universities have (at least partially) converted their teaching to online courses (96%), provided their staff with virtual workstations (93%), set up an information website on the topic (92%), offered virtual counselling for students (91%) and converted other face-to-face events (e.g. welcome events) to online events (91%). Almost three-quarters (74%) switched at least partially from face-to-face to online exams, and a good two-thirds (67%) created a Corona contingency plan. An emergency fund for students was set up at a good four out of ten universities (41%), psychological counselling specifically for students with pandemic-related problems at a good one in three universities.

For most of these measures, there are hardly any changes compared to the survey in the previous summer semester (the conversion to online examinations was not yet asked in the survey in the summer semester). The only noticeable changes are a slightly higher percentage for the conversion of other face-to-face courses to online courses (91% vs. 81%) and a significantly lower percentage for the establishment of a university emergency plan for Corona. The last finding can presumably be explained by the fact that some universities that had already set up such a plan in the previous semester no longer indicated this (although the question referred to all measures since the beginning of the pandemic and not just to the winter semester). Finally, it is striking that the proportion of universities that changed their grading policies due to the pandemic doubled from 7% in the summer semester to 14% in the winter semester.

Fig. 5: Teaching modes at the beginning and end of the winter semester 2020/21 as well as expected teaching modes for the summer semester 2021 and winter semester 2021/22 (in %)



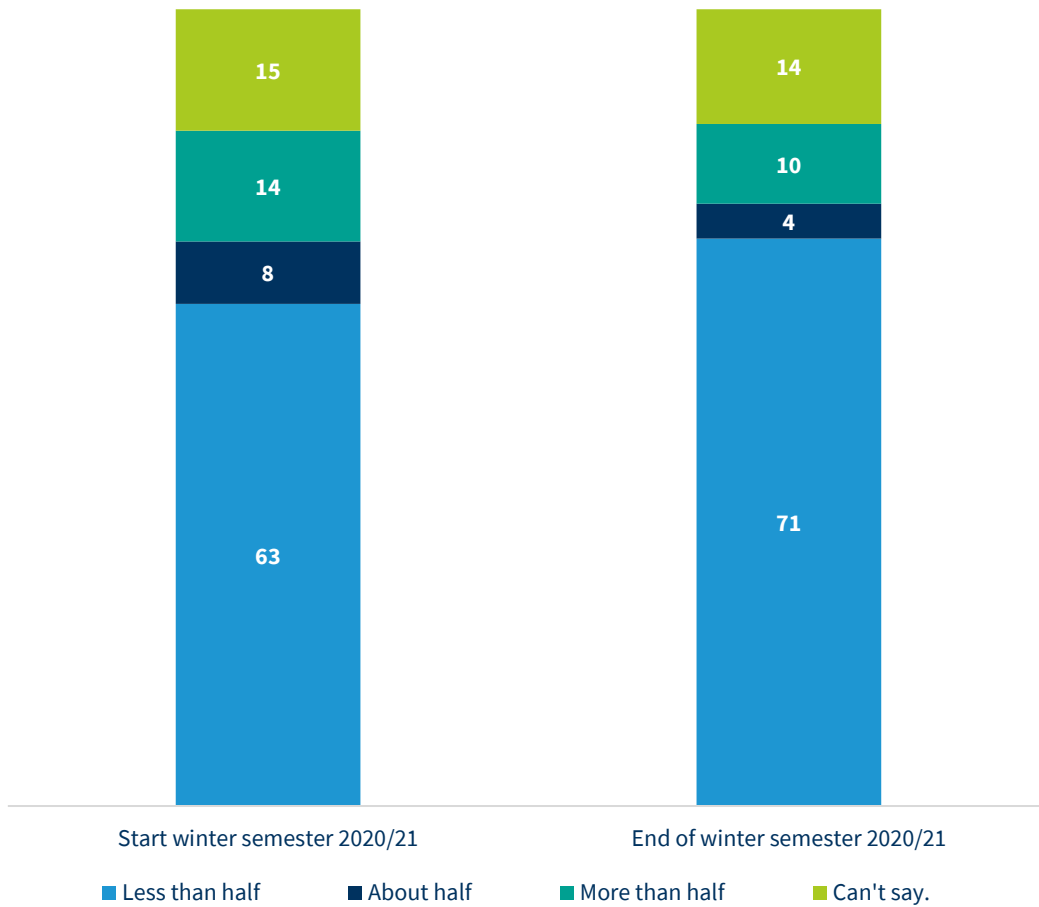
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Question wording: What mode of teaching was used at the beginning and end of the winter semester 2020/21? What kind of teaching mode do you expect for the summer semester 2021 and the winter semester 2021/22?

The timing of the winter semester survey (in the second half of February, i.e. shortly after the end of the winter semester) made it possible to query the teaching mode, distinguishing between the beginning and the end of the winter semester. This clearly shows that a majority of the universities, just over 80%, started the winter semester 2020/21 with a mixed model of face-to-face and online courses, while the remaining 20% of the universities started with pure online teaching (16%) or even pure face-to-face teaching (2%). Due to the development of the pandemic, especially from November and December 2020, many universities that had initially relied on a face-to-face or mixed model were then forced to switch to pure online teaching, often due to corresponding requirements at state level. At the end of the semester, the proportion of universities with a mixed model had therefore halved to a good 40%, while the proportion of universities with exclusively online teaching had risen to just under 60%.

Regarding the coming summer semester, a clear majority of universities (72%) expect a mixed model of face-to-face and online teaching and only just under 20% expect pure online teaching. For the coming winter semester 2021/22, only a good half of the universities surveyed see themselves in a position to make a prediction. Almost all of these universities (53%) also expect a mixed model of face-to-face and online courses, only 1% with a pure online teaching model and 3% with a pure face-to-face teaching model.

Fig. 6: Proportion of face-to-face courses in the mixed model at the beginning and end of the winter semester 2020/21 (in %)

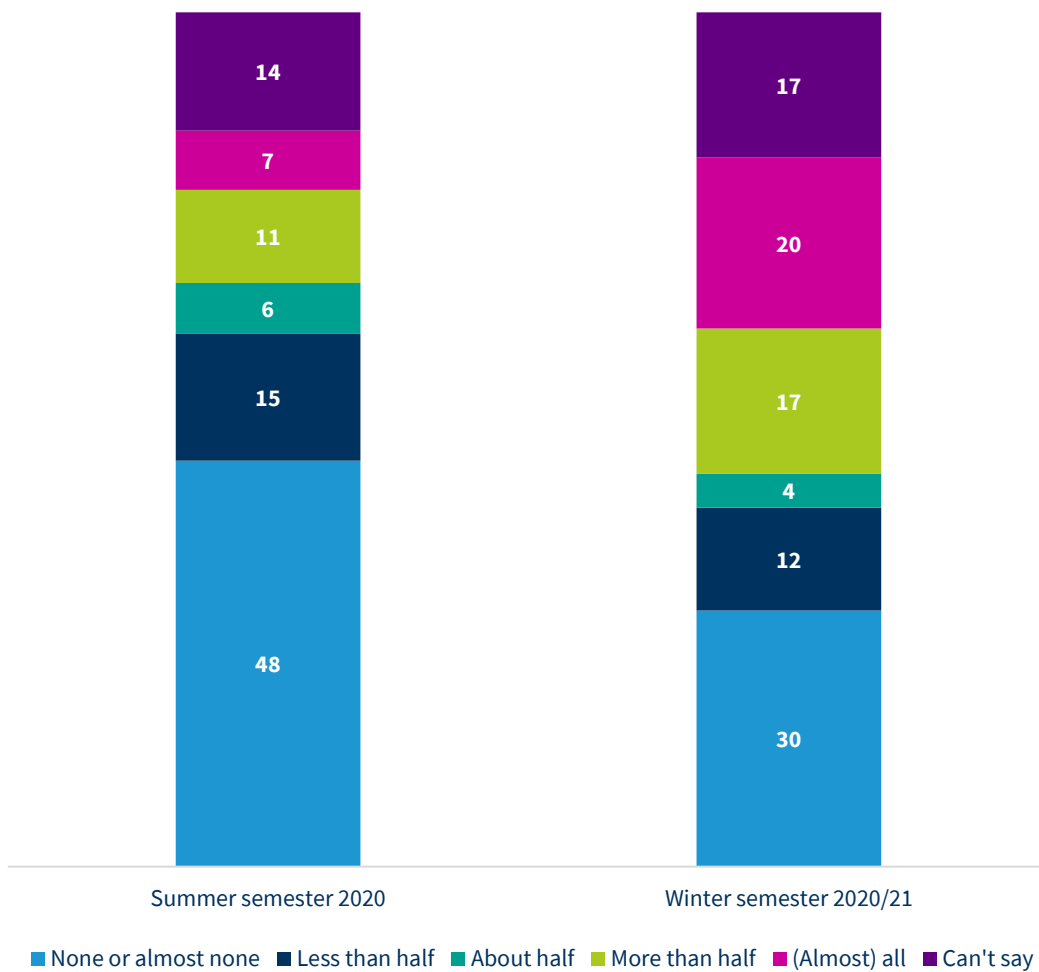


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Question wording: Please estimate the proportion of face-to-face courses in the mixed model practised at your university in the winter semester 2020/21.

If we ask the universities that practise a mixed model of face-to-face and online teaching at the beginning and end of the winter semester in more detail about the proportion of face-to-face courses in these mixed models, we find that a majority of the universities estimate this proportion to be less than half. At the end of the semester, the proportion of these universities (71%) is somewhat higher than at the beginning of the semester (63%). Only 8% and 4% respectively assume a roughly equal distribution of face-to-face and online courses, while 14% and 10% respectively assume a higher proportion of face-to-face teaching.

Fig. 7: Proportions of conversions from face-to-face to online examinations in summer semester 2020 and winter semester 2020/21 (in %)



13

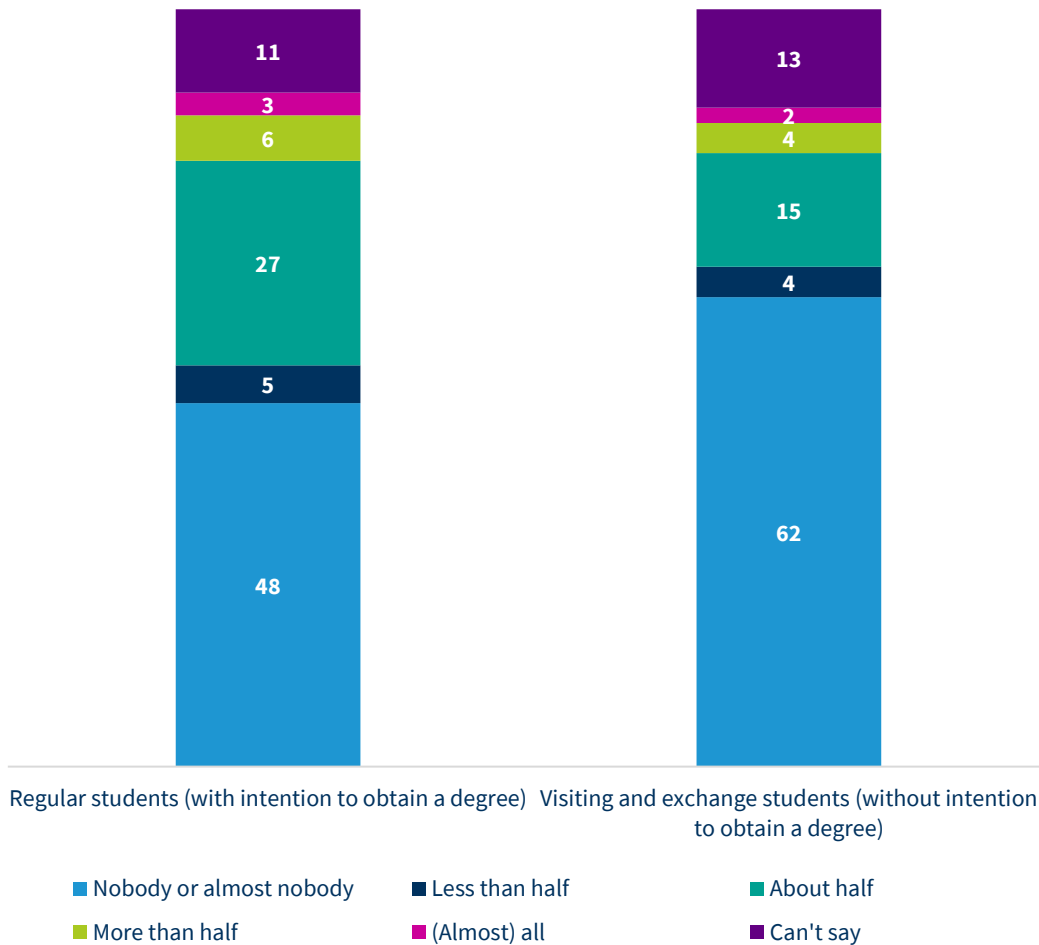
Question wording: Please estimate the proportion of face-to-face examinations that have been converted to online examinations at your university in the last two semesters.

German universities switched their examinations from face-to-face to online examinations much more frequently in the winter semester 2020/21 than in the summer semester 2020. This can probably be explained by the fact that more preparation time was available for this and that some federal states had also created the corresponding legal basis for such online examinations in the meantime. In the winter semester, more than four out of ten universities (41%) reported that they had switched at least every second examination from face-to-face to online mode. Every fifth university (20%) even stated that it had conducted all or virtually all examinations online.

In the summer semester, these percentages were even lower; only just under a quarter (24%) of the universities reported a conversion rate of at least 50% of all examinations to online examinations for the summer semester, and only 7% reported an (almost) complete conversion.

4 Effects and measures for international students in Germany

Fig. 8: Proportion of international first-year students with and without the intention to obtain a degree who received a university admission but no visa for Germany in winter semester 2020/21 (in %)



Question wording: Do you know of any international students who were admitted to your university for the winter semester 2020/21 but still did not receive a visa for Germany? If yes: What do you estimate: How high was the proportion of international first-year students with and without the intention to obtain a degree in Germany who were affected by this problem in the winter semester 2020/21?

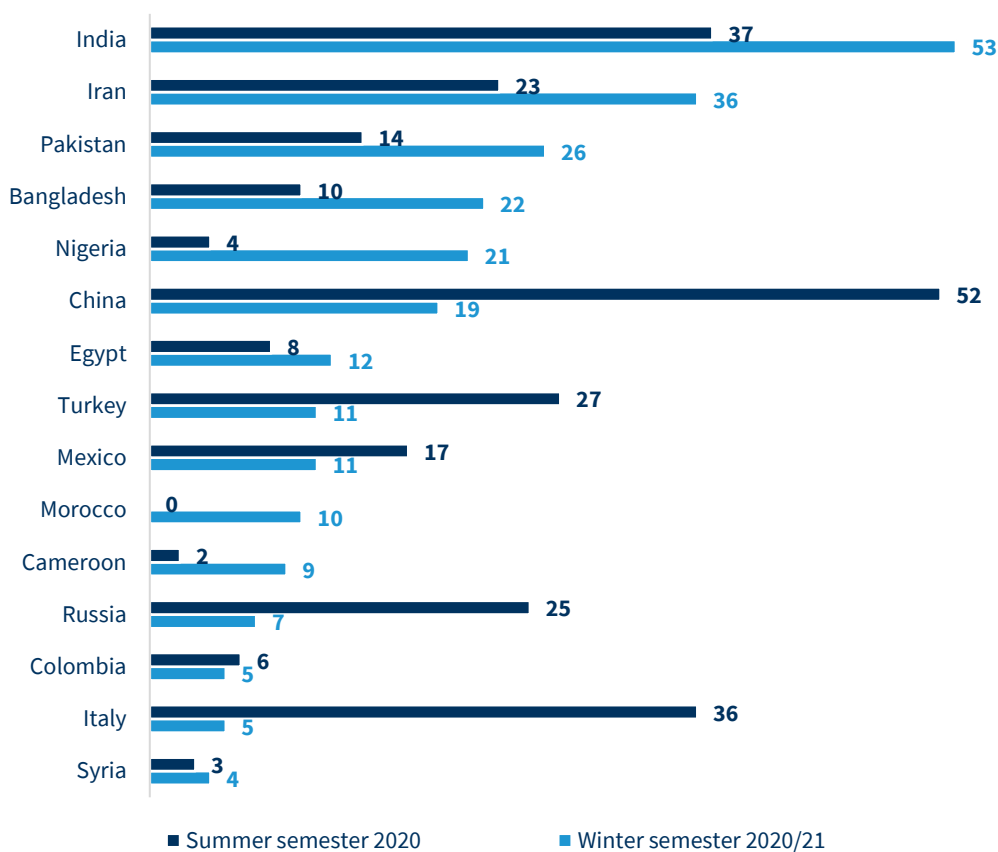
For the winter semester 2020/21, a survey was conducted to find out how many international students were unable to enter Germany due to problems with the issuing of visas despite having been admitted to the respective university. The survey distinguished between international regular students (with the intention of obtaining a degree in Germany) and international guest or exchange students (without the intention of obtaining a degree in Germany).

The findings clearly show that international regular students were much more frequently affected by visa problems than visiting and exchange students. This can probably be explained in particular by the significantly higher proportion of students from EU countries among the visiting and exchange students.

While more than a third of the universities (36%) reported that at least half of the admitted students were unable to enter Germany due to visa problems, this proportion was significantly lower among international guest and exchange students, at just over one in five of the universities (21%). Almost two-thirds of the universities also stated that no one or almost no one of the guest and exchange students had been affected by visa problems; regarding regular students, this was only true at just under half of the universities (48%).

Extrapolated to all 268 HRK member universities, around 14,700 international regular students and around 2,300 guest and exchange students did not receive a visa for their studies in Germany in the winter semester 2020/21.

Fig. 9: Key countries of origin of international students with visa problems in summer semester 2020 and winter semester 2020/21 (in %)



Question wording: Please indicate - if possible - from which countries of origin the students concerned primarily come.

Indian students were most frequently affected by visa and related entry problems. 53% of the universities that responded to this question named India as one of the countries of origin most affected by this issue. Also frequently affected were students from Iran (36%), Pakistan (26%), Bangladesh (22%), Nigeria (21%) and China (19%).

Compared to the summer semester 2020, there are thus clear differences in the countries of origin that, according to the universities, were primarily affected by problems with entry. In the summer semester, China topped the list of affected countries of origin with 52% of the mentions, followed by India (37%), Italy (36%), Turkey (27%), Russia (25%) and Iran (23%).

Fig. 10: Support measures of the universities specifically for international students in summer semester 2020 and winter semester 2020/21 (in %)



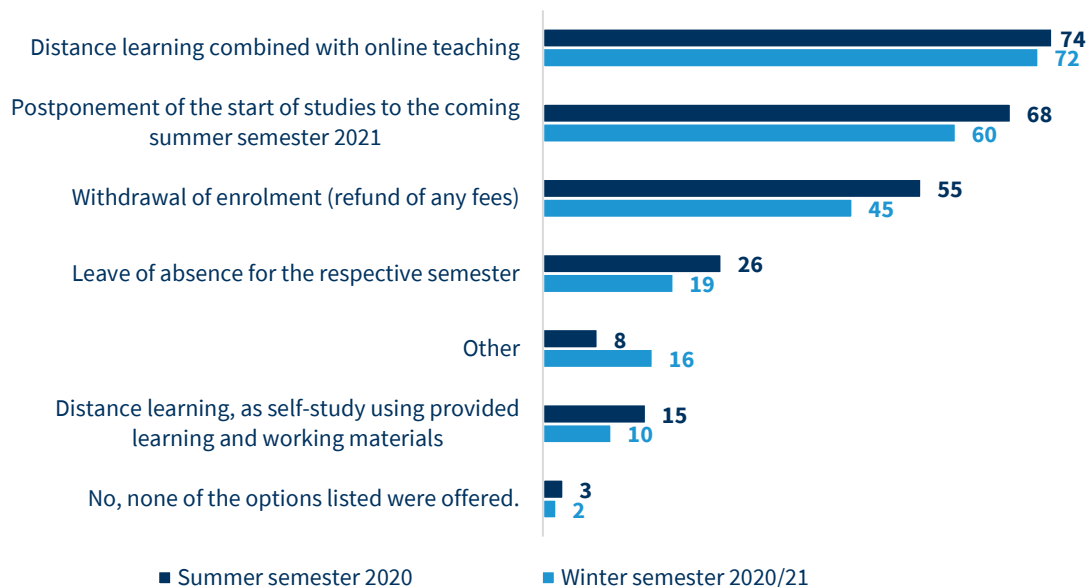
16

Question wording: In addition to the COVID 19 measures that were already asked about at the beginning, are there any other support services offered by your university that are specifically aimed at international students?

In addition to the general support services for students, many universities also provided special services for international students in the winter semester 2020/21. Overall, more than nine out of ten universities report having set up such offers (92%). Almost three quarters (74%) of the universities offered virtual events or online seminars specifically for international students, and just under two thirds report increased information offerings on the topics of health, safety and well-being for international students. About half of the universities advised international students on the topic of student status or student visa (53%) and issued them with statements of support if needed (49%). Emergency funding specifically for international students was provided by four out of ten universities (40%). Significantly less often, however, universities reported providing asynchronous learning opportunities for international students in other time zones (22%), a hotline or other feedback service to report concerns about discrimination or xenophobia (15%), special permission for electronic signatures on official documents (14%), additional places for international students in halls of residence (9%) or alternative housing for international students (8%).

Compared to the summer semester, there was a significant increase in the number of universities that offered virtual events or online seminars specifically for international students (74% vs. 57%), issued statements of support (49% vs. 25%) and organised alternative housing for international students (8% vs. 3%).

Fig. 11: Support offered by the universities for international first-year students who could not enter Germany in the summer semester 2020 and winter semester 2020/21 (in %)



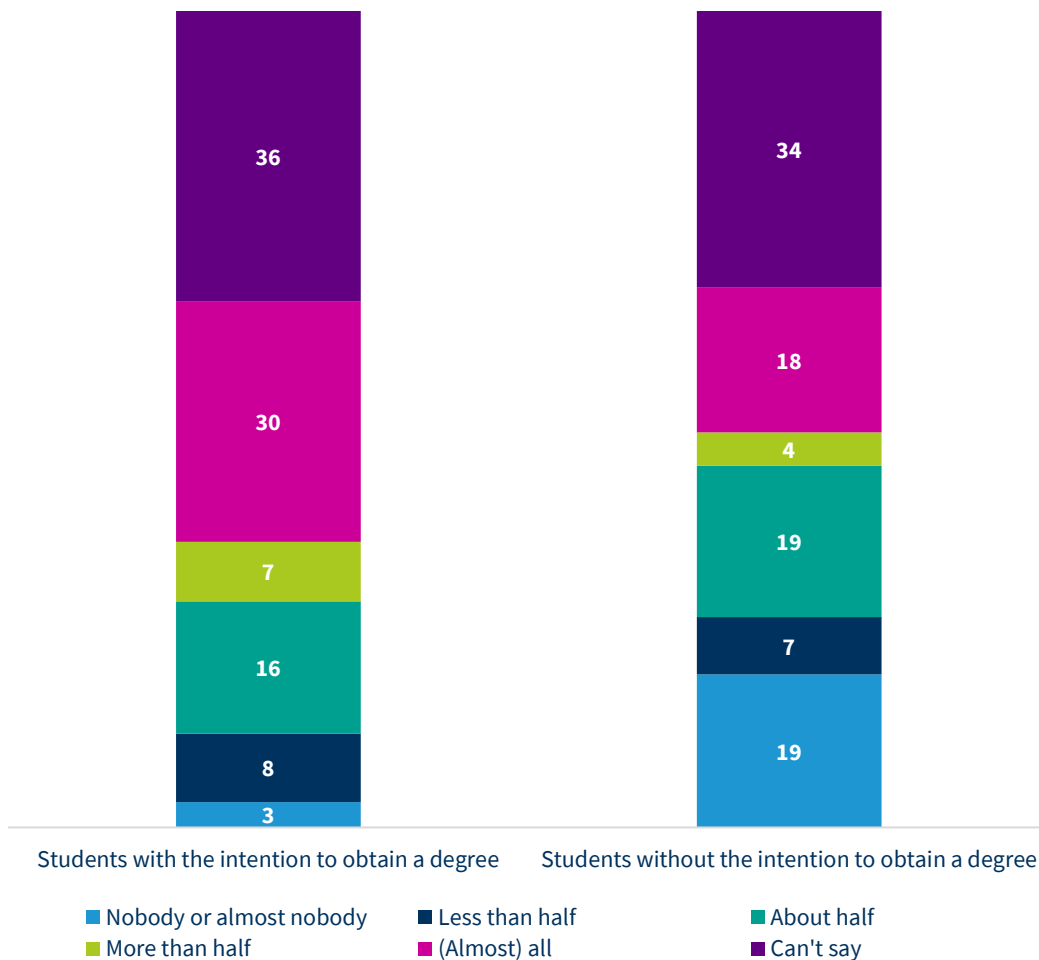
Question wording: Did your university offer international first-year students who were unable to enter Germany one of the following options regarding their studies?

17

In the survey in the winter semester, the universities were also asked whether they had offered the international first-year students who were unable to enter Germany certain alternatives regarding their studies. Almost three quarters of the universities (72%) offered the affected students distance learning with online courses, and almost two thirds (60%) offered to postpone the start of their studies until the coming summer semester. At just under half of the universities (45%), the affected students were also able to withdraw their enrolment, including a refund of any fees. Students were granted a leave of absence for the winter semester much less frequently (19%), as was distance learning as self-study using learning and work materials provided (10%).

These percentages have hardly changed in comparison to the summer semester 2020; the slight deviations are presumably largely a consequence of the not exactly identical group of participants in both surveys. The only exceptions are the comparatively significant declines in the postponement of the start of studies (60% vs. 68%) and, in particular, the withdrawal of enrolment (45% vs. 55%). A possible explanation for this could be that the winter semester already no longer represented quite such an unforeseen exceptional situation for the students as the summer semester, since the framework conditions (and the possible risks) of the practical implementation of the study programme in the winter semester were already largely clear at the time of application.

Fig. 12: Proportion of international students with and without the intention to obtain a degree who used support services offered by the universities in winter semester 2020/21 (in %)



18

Question wording: Can you estimate how many students in the two groups mentioned have made use of these offers?

The universities were also asked in the winter semester survey whether they could estimate how many international students made use of the aforementioned offers. Here, a distinction was made between international regular students (with the intention of obtaining a degree in Germany) and international guest and exchange students (without the intention of obtaining a degree in Germany).

The first finding was that a relatively high proportion of the universities, a good third, could not make a statement about the proportion of students who made use of the offers. In addition, there were again clear differences in the assessments of the two student groups. Just under a third of the universities (30%) assumed that all or almost all of the international students affected by entry problems had made use of one of the offers. Regarding the guest and exchange students affected, this proportion was only 18%. The proportion of universities that estimated that none or almost none of the guest and exchange students affected had made use of one of the offers was somewhat higher here, at 19%, while this proportion was just 3% in relation to the regular students affected.

5 Effects and measures within the framework of international university marketing

Fig. 13: Impact of the COVID-19 pandemic on communication activities to reach international students and prospective students in summer semester 2020 and winter semester 2020/21 (in %)

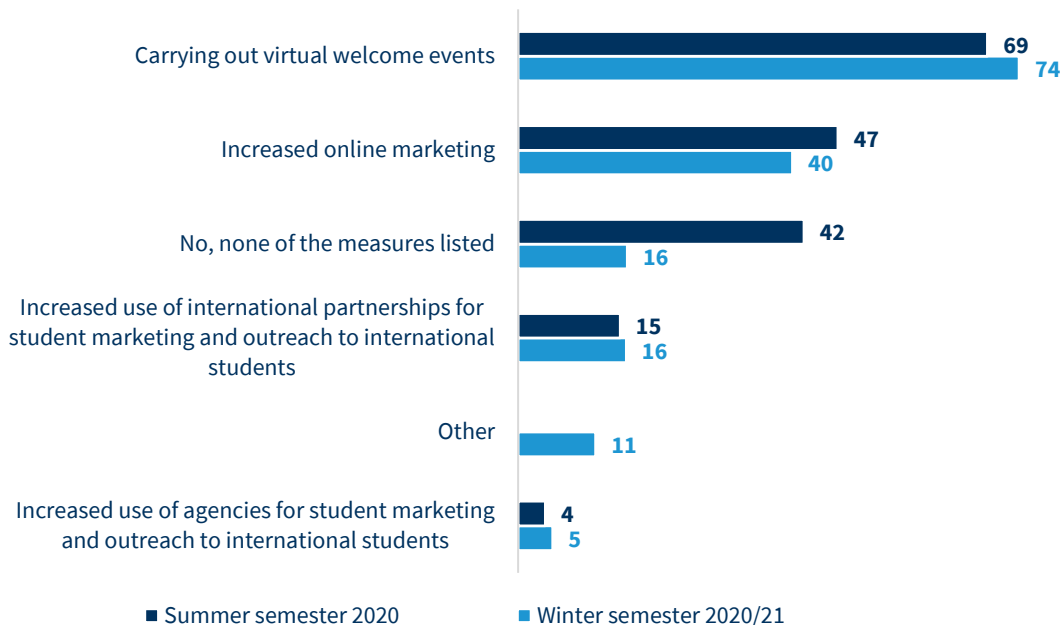


Question wording: How has the COVID 19 pandemic affected your university's communication activities regarding international students and prospective students?

The impact of the pandemic also affected international university marketing in the winter semester 2020/21. Overall, more than eight out of ten universities (84%) reported that at least one of the listed impacts affected their marketing activities. At more than six out of ten universities (62%), business trips for marketing purposes were cancelled. Welcome and marketing events also had to be cancelled at over a third of the universities (37% and 36% respectively). Slightly less frequently, on the other hand, were cancellations by local partners (23%) and agencies (14%) cited as the reason for cancelling marketing activities.

Compared to the summer semester 2020, there have been some significant changes. This applies in particular to the cancellation of welcome events, which were reported by less than half as many universities in the winter semester as in the summer semester (37% vs. 80%). This can probably be explained by the fact that many universities had planned virtual welcome events from the beginning, which then did not have to be cancelled despite the worsening pandemic in November and December. Similar reasons may also have led to the fact that marketing events had to be cancelled somewhat less frequently than in the summer semester (36% vs. 51%).

Fig. 14: Measures for virtual contact with international students in summer semester 2020 and winter semester 2020/21 (in %)



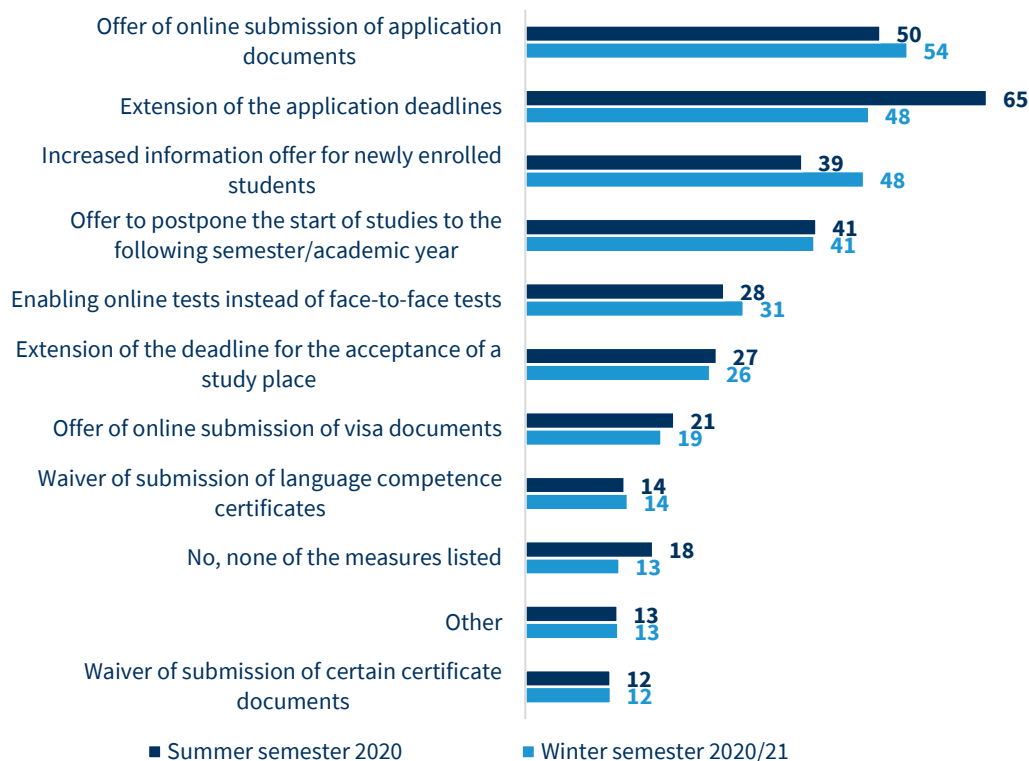
Question wording: Has your university taken one or more of the following measures in the winter semester 2020/21 to enable digital or virtual contact with international students?

More than eight out of ten German universities took measures in the winter semester 2020/21 to enable digital or virtual contact with international students. This represents a significant increase compared to the summer semester, when only just under six out of ten universities reported such measures.

The most frequent measure was the organisation of virtual welcome events, with almost three quarters of all universities (74%) making use of this. Four out of ten universities (40%) also relied on increased online marketing. In contrast, the increased use of international partnerships (16%) or agencies (5%) for student marketing and contacting international students was reported much less frequently.

It is striking that despite the significantly increased proportion of universities reporting the use of the measures listed, the proportion reporting increased online marketing fell from 47% in the summer semester to 40% in the winter semester. This can presumably be explained by the fact that universities that had already increased their use of online marketing in the summer semester due to the pandemic did not report this again, as the question referred to the winter semester.

Fig. 15: Adjustment measures in application and selection procedures for international students due to the COVID 19 pandemic in the summer semester 2020 and winter semester 2020/21 (in %)



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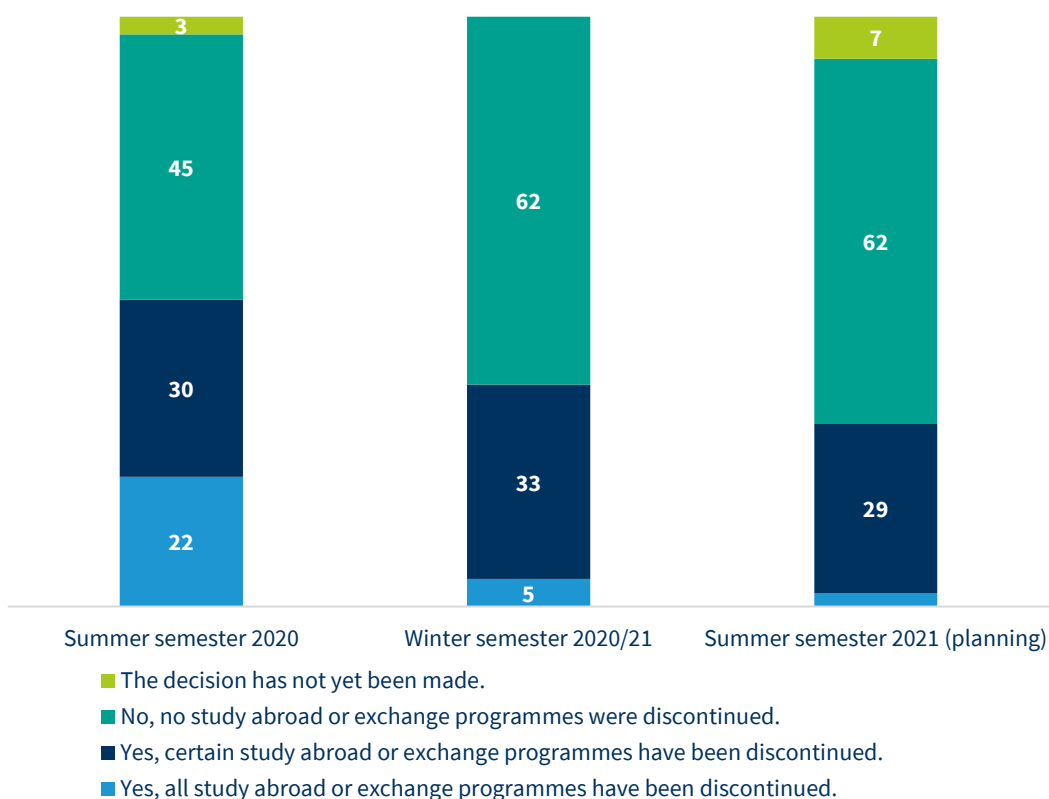
Question wording: Has your university adjusted the application and selection procedures for international students in the 2020/21 winter semester in light of the COVID 19 pandemic?

Almost nine out of ten universities responded to the COVID 19 pandemic in the winter semester 2020/21 with modifications to the application and selection procedures for international students (87%). This proportion has thus once again risen slightly compared to the summer semester 2020 (82%). At more than every second university (54%), it was also possible to submit application documents online. At just under half of the universities, application deadlines were extended (48%) and at a good quarter of the universities (26%) the same applied to the deadline for accepting a place. Just under one in two universities (48%) also supported their international students by providing more information, and a good four out of ten universities (41%) offered to postpone the start of studies until the following semester or the next academic year. Just under a third (31%) offered students the opportunity to take online tests instead of face-to-face tests, and just under a fifth of the universities (19%) made it possible to submit visa documents online. Somewhat less frequently, the universities reported waiving the submission of language competency certificates (14%) and waiving the submission of certain transcript documents (12%).

Overall, only some of these measures show clear differences between the summer and winter semesters. This applies above all to the extension of application deadlines, which was still reported by around two thirds of all universities (65%) in the summer semester, as well as the increased information offered to newly enrolled international students, which was only provided by just under four out of ten universities (39%) in the summer semester. The decline in the extension of application deadlines can probably be attributed to the fact that the application phase for the winter semester fell during a much quieter pandemic period than in the summer semester.

6 Effects and measures relating to the international mobility of students from Germany

Fig. 16: Proportion of discontinued or suspended study abroad and exchange programmes in the summer semesters 2020 and winter semester 2020/21 and corresponding plans for the summer semester 2021 (in %)

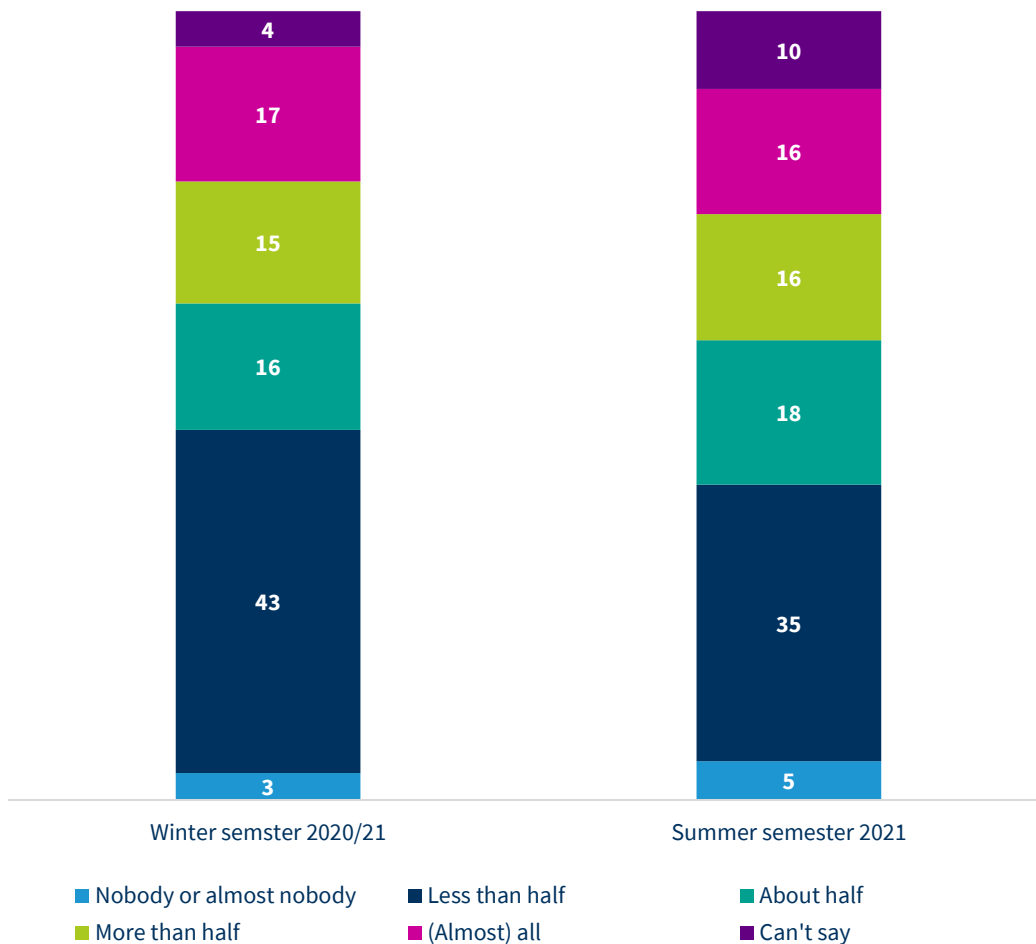


Question wording: Has your university discontinued previous study abroad or exchange programmes in the winter semester 2020/21 due to the COVID 19 pandemic? And is there already a corresponding plan for the coming summer semester?

The COVID 19 pandemic did not remain without consequences for the study abroad and exchange programmes for students in the winter semester 2020/21. One third (33%) of the universities have discontinued certain study abroad and exchange programmes, 5% even all programmes. However, almost two-thirds of the universities (62%) have discontinued no programmes at all. Compared to the summer semester 2020 (22%), the proportion of universities that have discontinued all exchange programmes has thus fallen.

The universities were again asked to forecast the situation for the coming summer semester 2021. Here, the distribution is very similar to that of the previous winter semester: just under one-third (29%) assume that certain exchange programmes will be discontinued, while a clear majority of almost two-thirds expect that no programmes will be discontinued or suspended in the coming summer semester. Only 2% expect all programmes to be discontinued or suspended, and another 7% of the universities are not yet in a position to make a corresponding forecast.

Fig. 17: Proportion of students who cancelled or postponed a study-related stay abroad planned for winter semester 2020/21 and summer semester 2021 due to the COVID 19 pandemic (in %)



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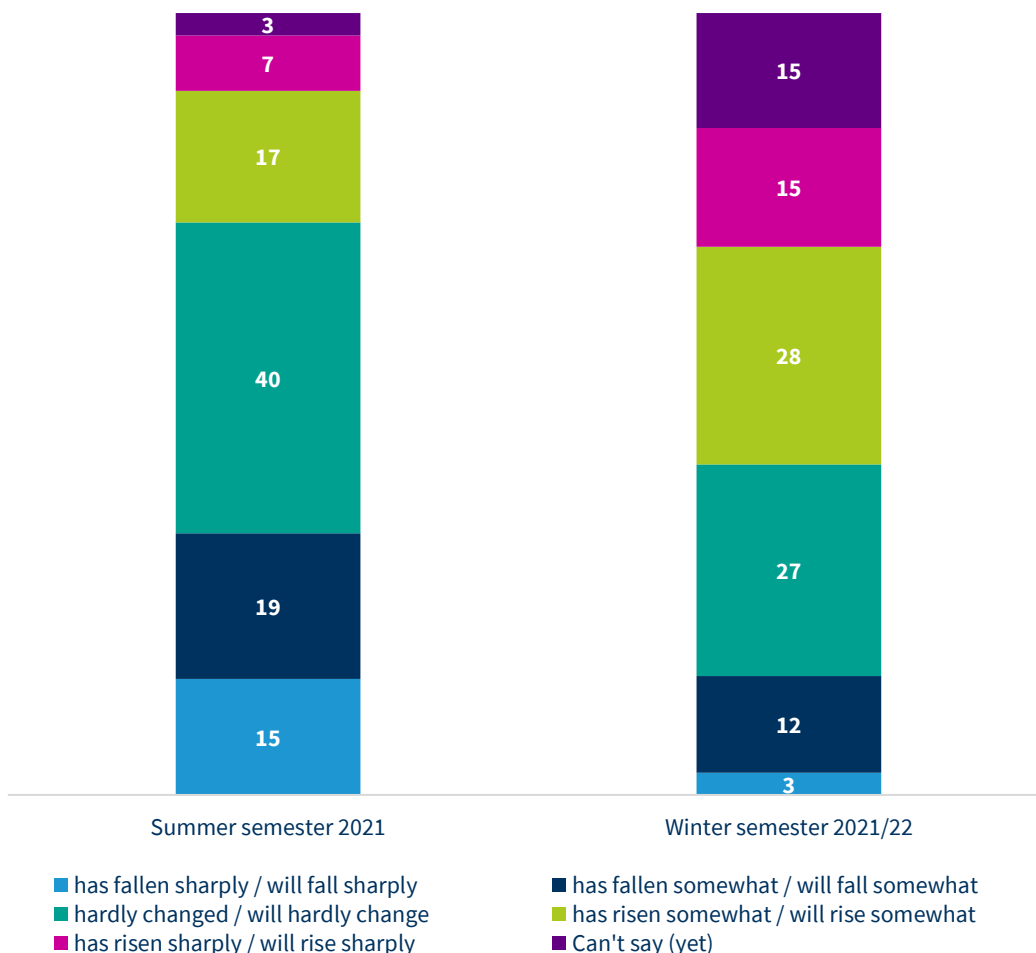
Question wording: Please estimate: What percentage of students at your university had planned a study-related stay abroad for the winter semester 2020/21 and the upcoming summer semester 2021, but cancelled or postponed it due to the COVID 19 pandemic?

Just about half of the universities (49%) state that of the students who had planned to study abroad in the winter semester 2020/21, at least every second student has cancelled or postponed this stay. However, almost as many universities (46%) assume that the proportion of students who have cancelled their planned stays abroad for the winter semester is less than half.

These assessments are very similar regarding the 2021 summer semester. The proportion of universities that assume a cancellation and postponement rate of less than 50% is slightly lower here (40%), and a slightly larger proportion of 10% of universities do not yet feel able to make a statement.

Extrapolated to all 268 HRK member universities, the figure for the winter semester 2020/21 is around 17,000 and for the summer semester 2021 around 12,500 cancelled or postponed stays abroad.

Fig. 18: Development of students' interest in a study-related stay abroad in summer semester 2021 compared to summer semester 2020 and in winter semester 2021/22 compared to winter semester 2020/21, according to the universities' assessment (in %)



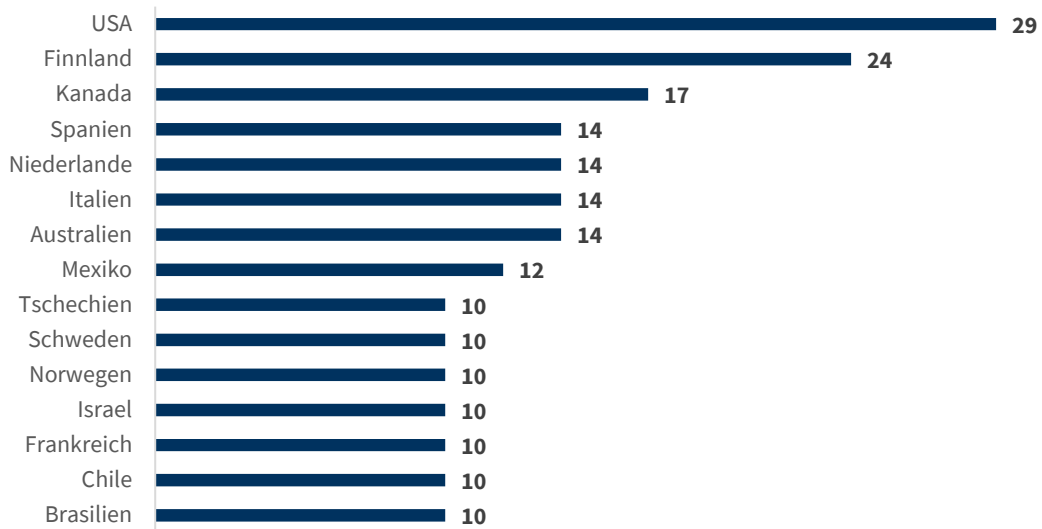
Question wording: As far as you can estimate: How has the interest of students at your university in a study-related stay abroad developed in the summer semester of 2021 compared to the summer semester of 2020? And what is your corresponding assessment for the winter semester 2021/22?

The universities were also asked to forecast their students' interest in a study-related stay abroad in the next two semesters. These assessments are comparatively optimistic. Four out of ten universities (40%) assume that student interest in study abroad will remain unchanged in the 2021 summer semester compared to the 2020 summer semester, and almost a quarter (24%) even expect interest to increase. Another third (34%) expect interest to decline.

The forecast for the winter semester 2021/22 is even more optimistic. More than four out of ten universities expect interest in stays abroad to increase compared to the previous winter semester, and only 15% expect interest to decrease. However, the proportion of universities that do not currently see themselves in a position to make a corresponding forecast is also significantly higher at 15%.

7 Digitalisation and virtual cooperation

Fig. 19: Conclusions of virtual collaborations with universities abroad due to the COVID 19 pandemic by partner country (in %)



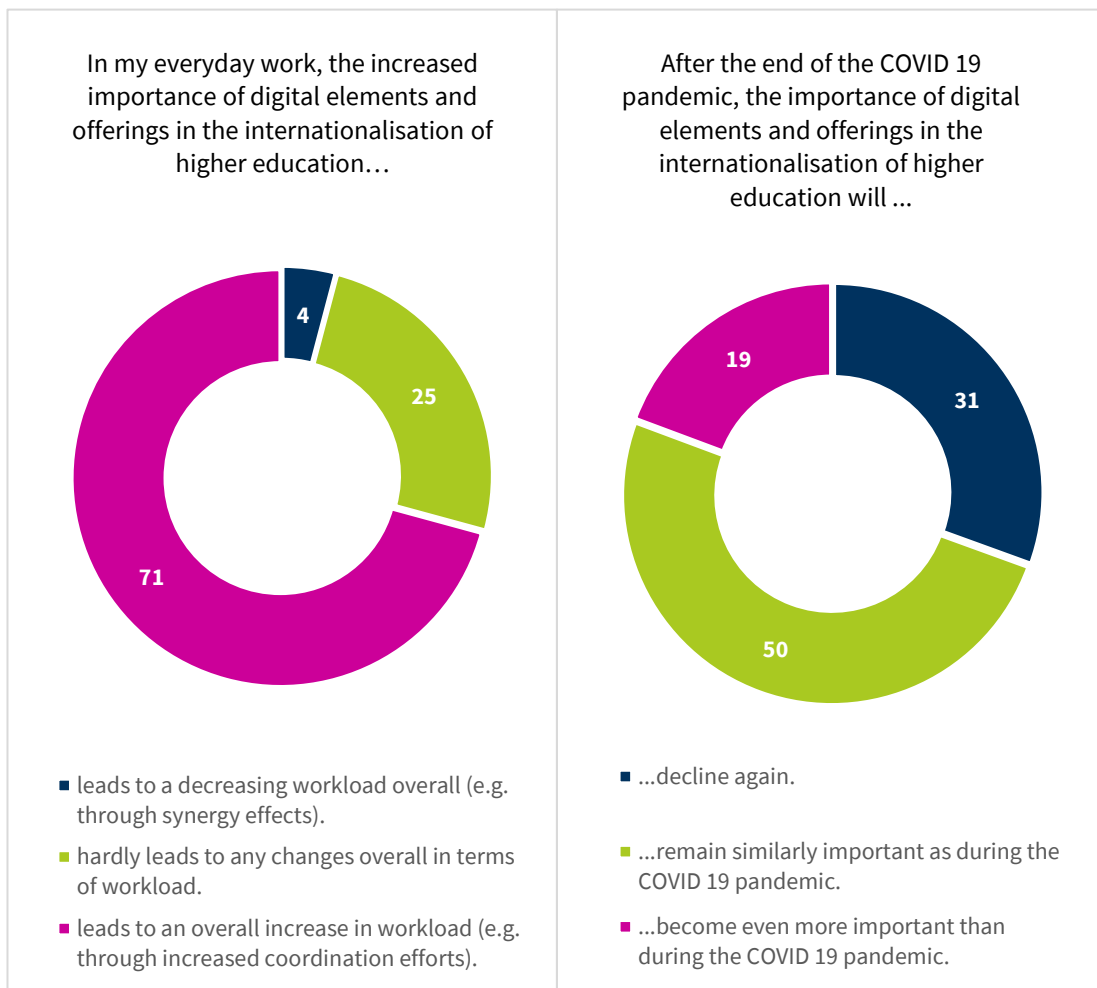
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Question wording: Due to the COVID 19 pandemic, have you entered into new, virtual cooperation agreements with universities abroad, e.g. to enable your students to participate digitally in their courses? If yes, with approximately how many universities?

A good quarter (26%) of all universities state that they have entered into new, virtual cooperation agreements with universities abroad as a result of the COVID 19 pandemic, e.g. to enable their own students to participate digitally in their courses.

Such virtual cooperation agreements were most frequently concluded with universities in the USA (29% of all mentions), Finland (24%) and Canada (17%). Spain, the Netherlands, Italy and Australia (14% of all mentions each) as well as Mexico (12%) are also frequently mentioned as virtual cooperation partners. In addition, the most important 15 countries with which such virtual cooperation agreements were concluded also include the Czech Republic, Sweden, Norway, Israel, France, Chile and Brazil (10% of mentions each). The focus of cooperation partners is thus on America and Europe.

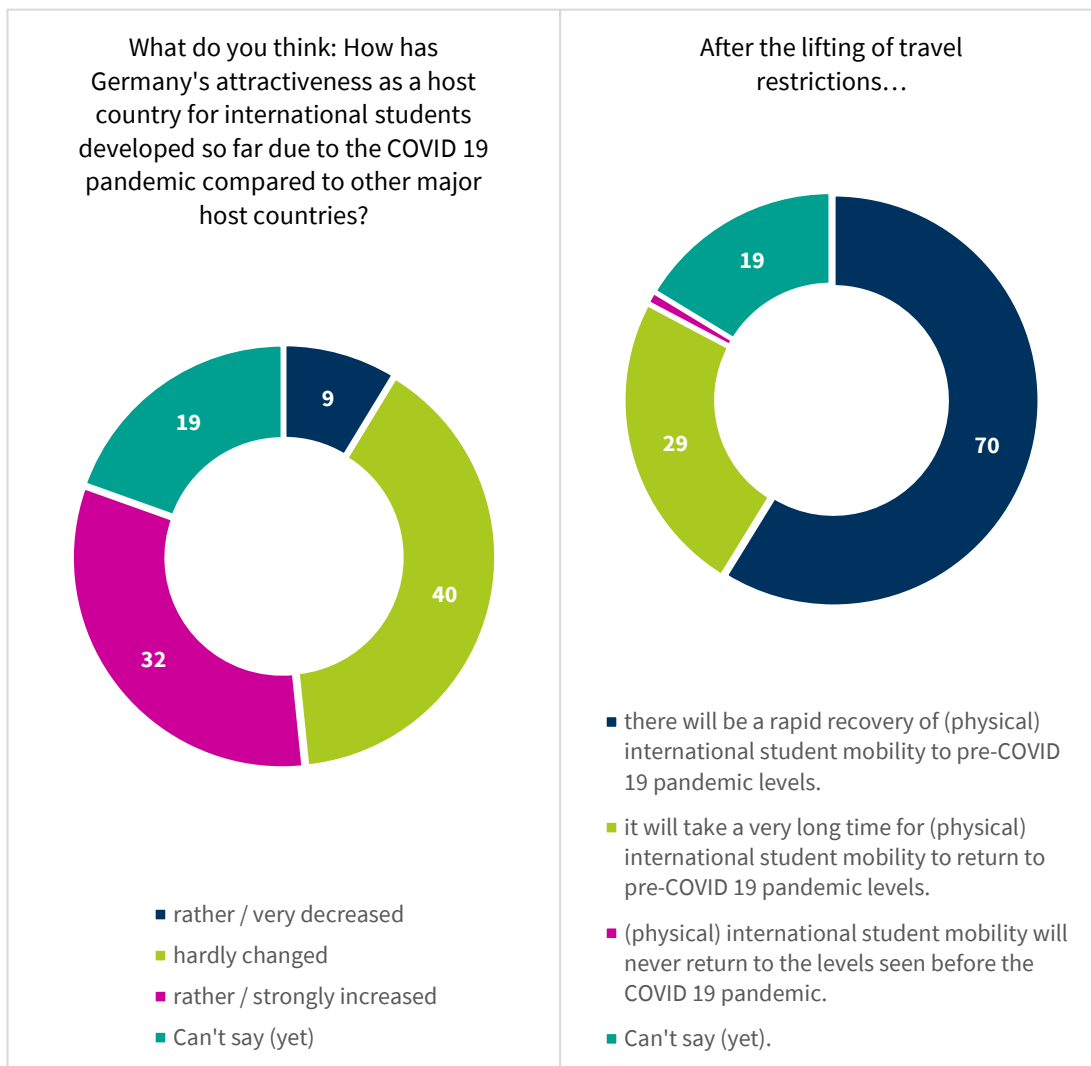
Fig. 20: Assessments of the importance of digital elements and offerings in internationalisation of higher education and the associated workload (in %)



The COVID 19 pandemic undoubtedly led to a sharp increase in the importance of digital elements and offerings in internationalisation of higher education. What impact have these developments had on the everyday work of International Offices at universities in Germany? A clear majority - more than seven out of ten universities (71%) - stated that the increased importance of digital elements and offerings in the everyday work of International Offices has led to an overall increase in workload (e.g. through increased coordination efforts). Only 4% report a decrease in workload, while the remaining quarter of universities (25%) do not perceive any digitisation-related changes in workload.

Half of the universities also believe that the importance of digital elements and offerings in internationalisation of higher education will remain similar after the end of the COVID 19 pandemic as during the COVID 19 pandemic. Only just under a third (31%) of the universities assume that the importance of digital elements and offerings will decline again after the end of the COVID 19 pandemic. Just under a fifth (19%) of the universities even expect the importance of digital elements and offerings to continue to increase, even beyond the end of the COVID 19 pandemic.

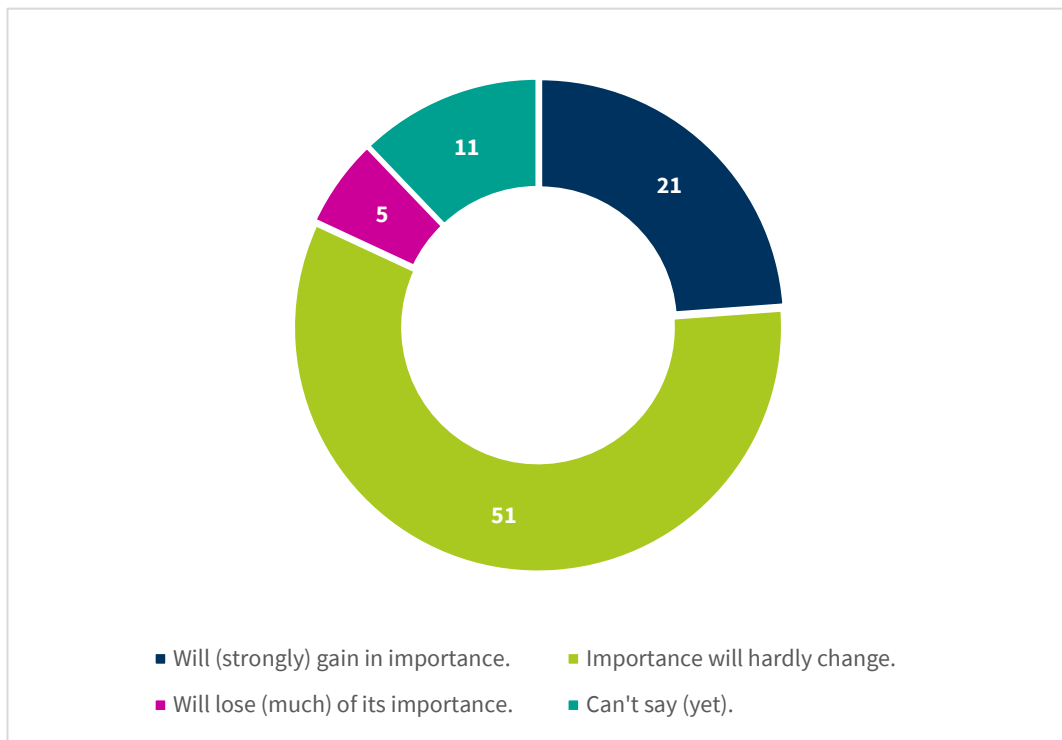
Fig. 21: Assessments of Germany's popularity as a host country and the development of international student mobility in the context of the COVID 19 pandemic (in %)



The majority of universities assess the consequences of the COVID 19 pandemic for Germany's attractiveness as a host country for international students as positive. Almost every third university (32%) assumes that Germany's attractiveness as a host country for international students has so far tended to increase or even increased significantly as a result of the COVID 19 pandemic compared to other important host countries. Only just under one in ten universities (9%) expect Germany's competitive position to worsen as a result of the pandemic, while 40% expect no change in this regard as a result of the pandemic.

The majority of universities are also optimistic about the future of (physical) international student mobility. Seven out of ten universities (70%) expect a rapid recovery of (physical) international student mobility to the pre-COVID 19 pandemic level following the lifting of travel restrictions. Only just under one in three universities expect this recovery to take a very long time, and just 1% of universities expect that international student mobility will never again reach the level before the pandemic began.

Fig. 22: Assessment of the impact of the COVID 19 pandemic on the importance of internationalisation of higher education (in %)

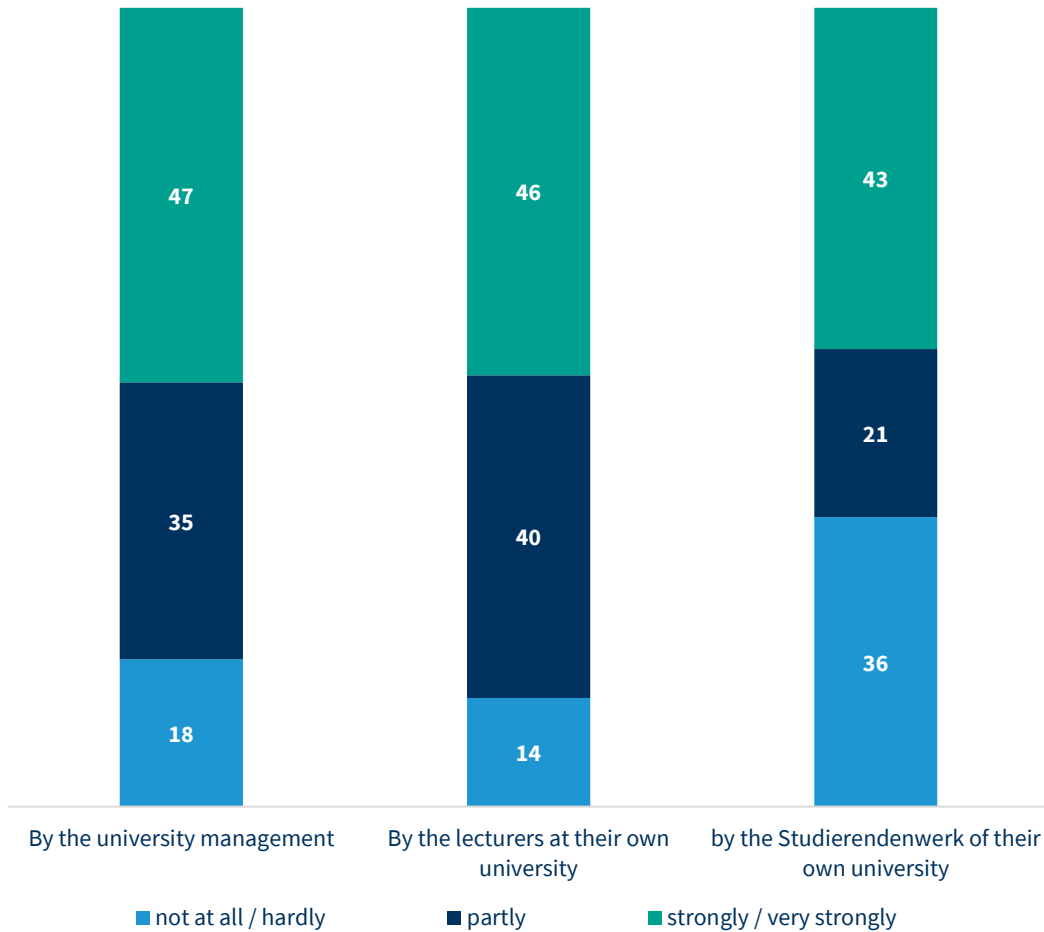


28

Question wording: Do you think that the topic of internationalisation at your university will gain or lose importance as a result of the COVID 19 pandemic?

The universities are also rather optimistic about the future of internationalisation of higher education, despite or precisely because of the COVID 19 pandemic. A good fifth (21%) of universities assume that the pandemic will increase the importance of internationalisation of higher education, compared to just 5% of universities that expect the pandemic to lead to a loss of importance of internationalisation of higher education. Half (51%), and thus by far the largest proportion of universities, assume that the importance of internationalisation of higher education will remain largely unaffected by the pandemic.

Fig. 23: Consideration of the interests and problems of international students in the context of the pandemic management of the universities, according to the assessment of the International Offices (in %)



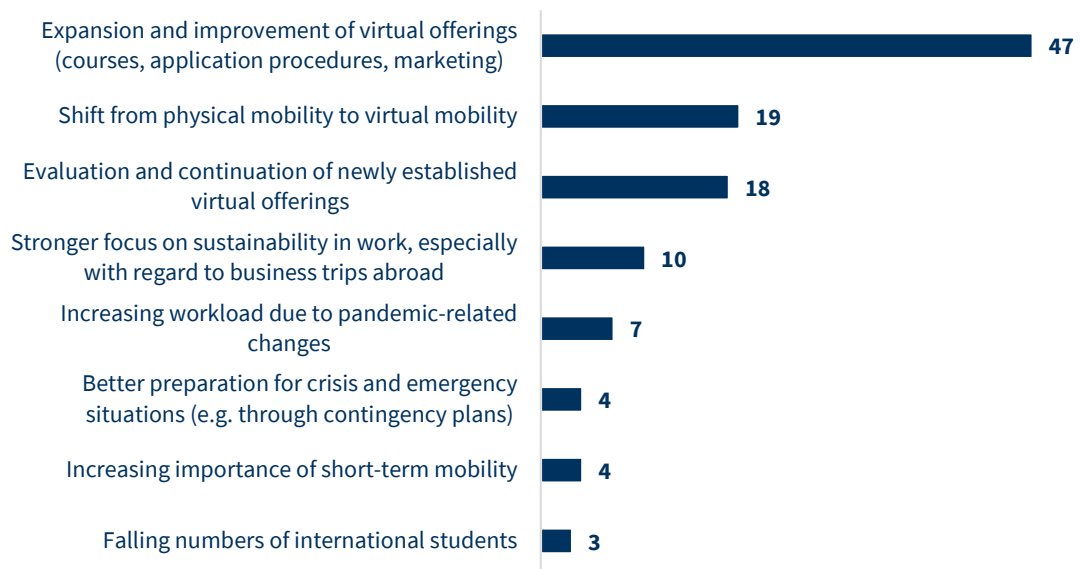
29

Question wording: If you look back at the last two semesters: To what extent were the interests and problems of international students at the universities taken into account in the implementation of the pandemic measures during the last two semesters?

Almost every second International Office attests to the strong or even very strong commitment of their university's management and teaching staff to international students in the context of pandemic management. Only 14% and 18% respectively could perceive no or hardly any commitment on the part of their teachers or university management to the interests and problems of international students in this context.

In contrast, the International Offices at some universities are much more critical of the Studierendenservice. It is true that their commitment to international students in the context of pandemic management is rated as strong or very strong at a good four out of ten universities. At the same time, however, more than a third of the International Offices attest that the respective Studierendenservice has no or hardly any commitment to international students at their own university.

Fig. 24: Impacts of the COVID 19 pandemic that the universities believe will be taken into account in future planning



Question wording: In your view, are there any medium to long-term effects of the COVID 19 pandemic that you will take into account in your planning in the future?

30

When asked which medium- to long-term effects of the COVID 19 pandemic they will take into account in their future planning, the expansion and improvement of virtual offerings (e.g. courses, application procedures, marketing) is mentioned by far the most frequently. Almost half of the universities that gave an indication in this regard (47%) want to take this aspect into account in their future planning. Also frequently mentioned is the shift from physical mobility to virtual mobility (19%) and the evaluation and continuation of newly established virtual offerings (18%). A stronger focus on sustainability at work, especially regarding business trips abroad (10%) and the increasing workload due to pandemic-related changes (7%) are also topics that some of the universities want to include more in their planning in the future.

In comparison, aspects such as better preparation for crisis and emergency situations (e.g. through emergency plans), the increasing importance of short-term mobility (4% each) or a decline in the number of international students (3%) are mentioned rather rarely.

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