

# **Higher Education Policy in Estonia Through the Lens of EUROSTUDENT 9: Widening Access or Widening Gaps?**

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# **Estonian HE system & policy changes**

# **Estonian HE system: a combination of autonomous universities and centralized coordination**

- High degree of academic and organizational autonomy of universities
- Strong role of the Ministry of Education and Research, administrative agreements between state and public universities
- Share of public expenditure (85%) at tertiary level is one of the highest in OECD (average: 69%)
- Since 2013: free education to full-time students studying in the national language (Estonian)

# State level policy changes since 2022 to summer 2025

- Restrictions on tuition-free study: studying simultaneously in multiple curricula, re-entering HE at the same level, resuming studies after interruption, etc. (implemented in 2023)
  - Could improve access to HE, but could also disproportionately affect people from more vulnerable background **whose educational pathways are not linear**
  - **Has the representation of different student groups (e.g., first-generation students, older students) changed?**
- Increasing the student loan (from max €2,500 to €3,000) in 2022 and doubling the rates of needs-based study allowance in 2023 (maximum rate increased from €220 to €440)
  - Could support vulnerable groups, but only marginally, as neither the student loan nor the allowance fully covers students' living expenses; moreover, both remain inaccessible to many students in need
  - **Has the financial situation of students improved? Has working alongside studies decreased?**
- Transition to Estonian-language education (implemented since 2024)
  - Could either increase or decrease access to HE for linguistic minorities depending on how successfully the reform is implemented
  - The impact of the reform on access to HE is likely to become apparent only from 2033

# Increasing access at HEI level for vulnerable groups

- **Students from lower socioeconomic backgrounds**
  - Financial support mechanisms during studies
  - Socioeconomic background not considered in admission decisions
- **Linguistic minorities**
  - Support for developing language skills during studies
  - Linguistic background not considered in admission decisions
- **Students with impairments**
  - Support services and counselling are generally available, incl psychological, academic and sometimes financial support
  - Students are usually expected to seek support themselves
  - Proof of disability/impairment may be required
- **How do HEI-level measures influence access for vulnerable groups? Are students with impairments adequately represented in HE? Is the existing support for students with impairments sufficient?**

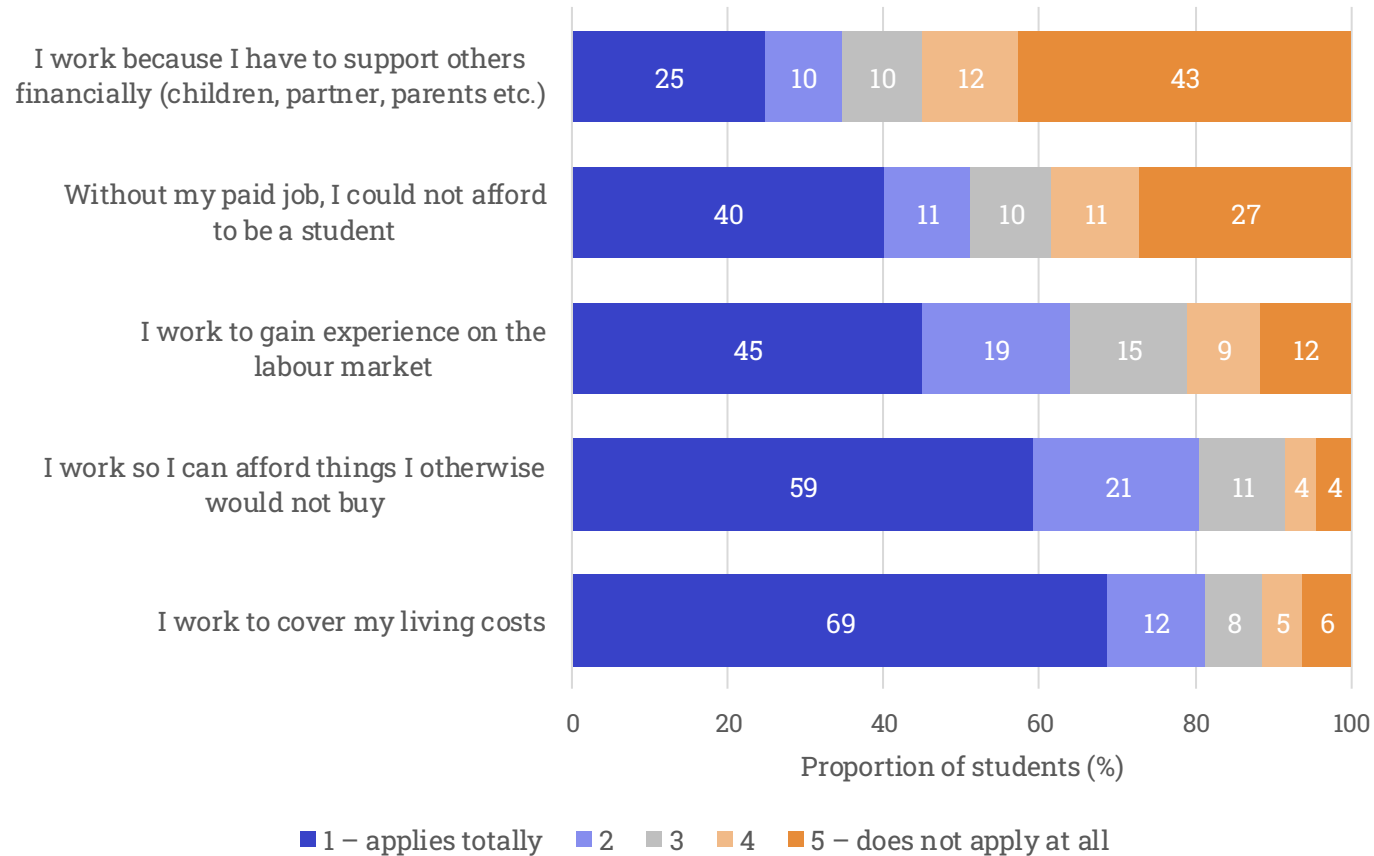
# **EUROSTUDENT 9**

## **Estonian study results**

# Overview of the student population

- **The average age of students is 27.6**
  - Gradual increase across EUROSTUDENT survey waves: 26.3 in 2016, 27 in 2019, 27.2 in 2022 → 27.6 in 2025
- **Under- and overrepresented groups in Estonian HE**
  - Students who completed basic education in Russian are underrepresented: 10% in student body vs. 18–21% in general population
  - Students with highly educated parents are overrepresented: 62% in student body vs. 45% in general population
  - Students with special needs are overrepresented: 27% in student body vs. 14% in general population
  - Same patterns as in EUROSTUDENT 8
- **Serious intentions to drop out are more common among vulnerable groups**
  - Students who completed basic education in Russian (7% vs. 4% of those who completed it in Estonian)
  - First-generation students (5% vs. 3% of students with highly educated parents)
  - Students with special needs (5% vs. 4% of students without special needs)
  - Same patterns as in EUROSTUDENT 8

# Employment among students



**Figure 1.** Proportion of employed students (%) by reason for employment. N=2652–2674.  
*Note: scale points 1 and 2 indicate (total) agreement with the statement, and scale points 4 and 5 indicate (total) disagreement with the statement.*

- **Approx. 62% of students work during the semester alongside their studies**
  - After a previous upward trend, the share of working students has declined: 66% in 2016, 68% in 2019, 70% in 2022 → 62% in 2025
- **Need-based reasons for working have increased among students**
  - To cover living expenses: 78% in 2022 → 81% in 2025
  - To afford things they would otherwise not be able to afford: 77% in 2022 → 81% in 2025
  - To be able to afford being a student: 43% in 2022 → 51% in 2025
  - To support others financially: 32% in 2022 → 35% in 2025

# Income & expenses

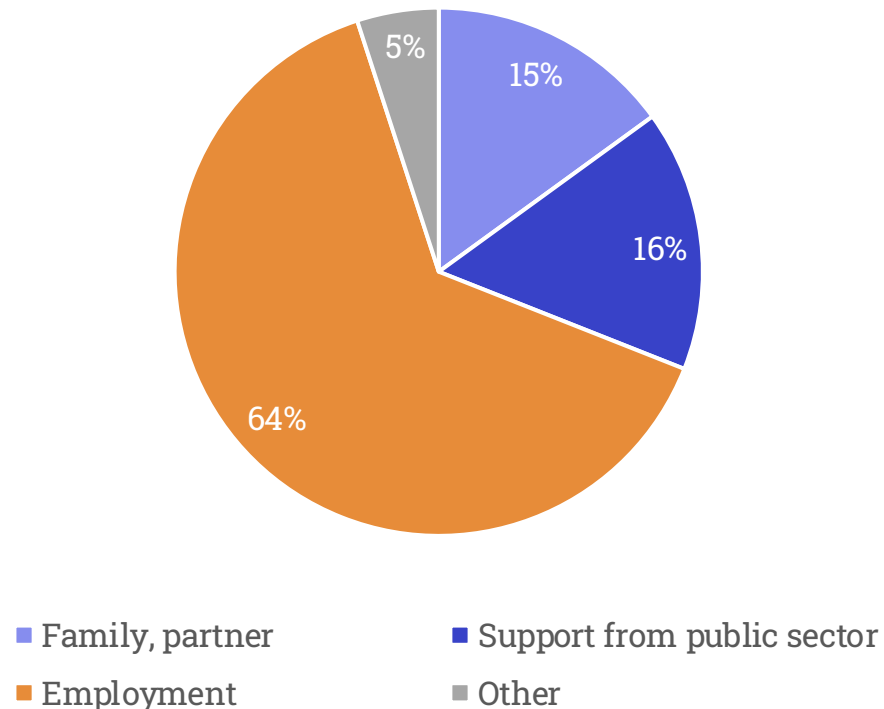
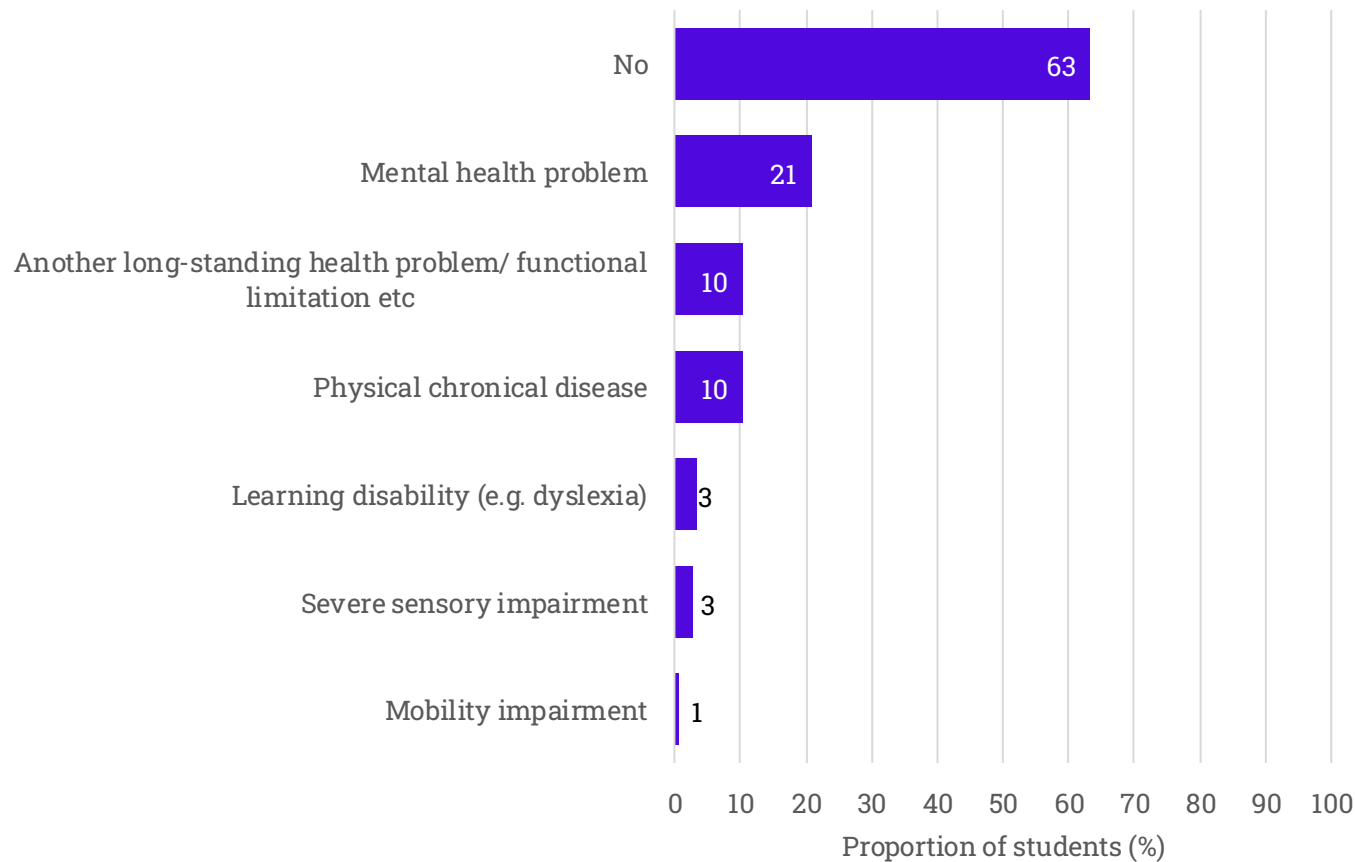


Figure 2. Students' income sources (%). N=3907

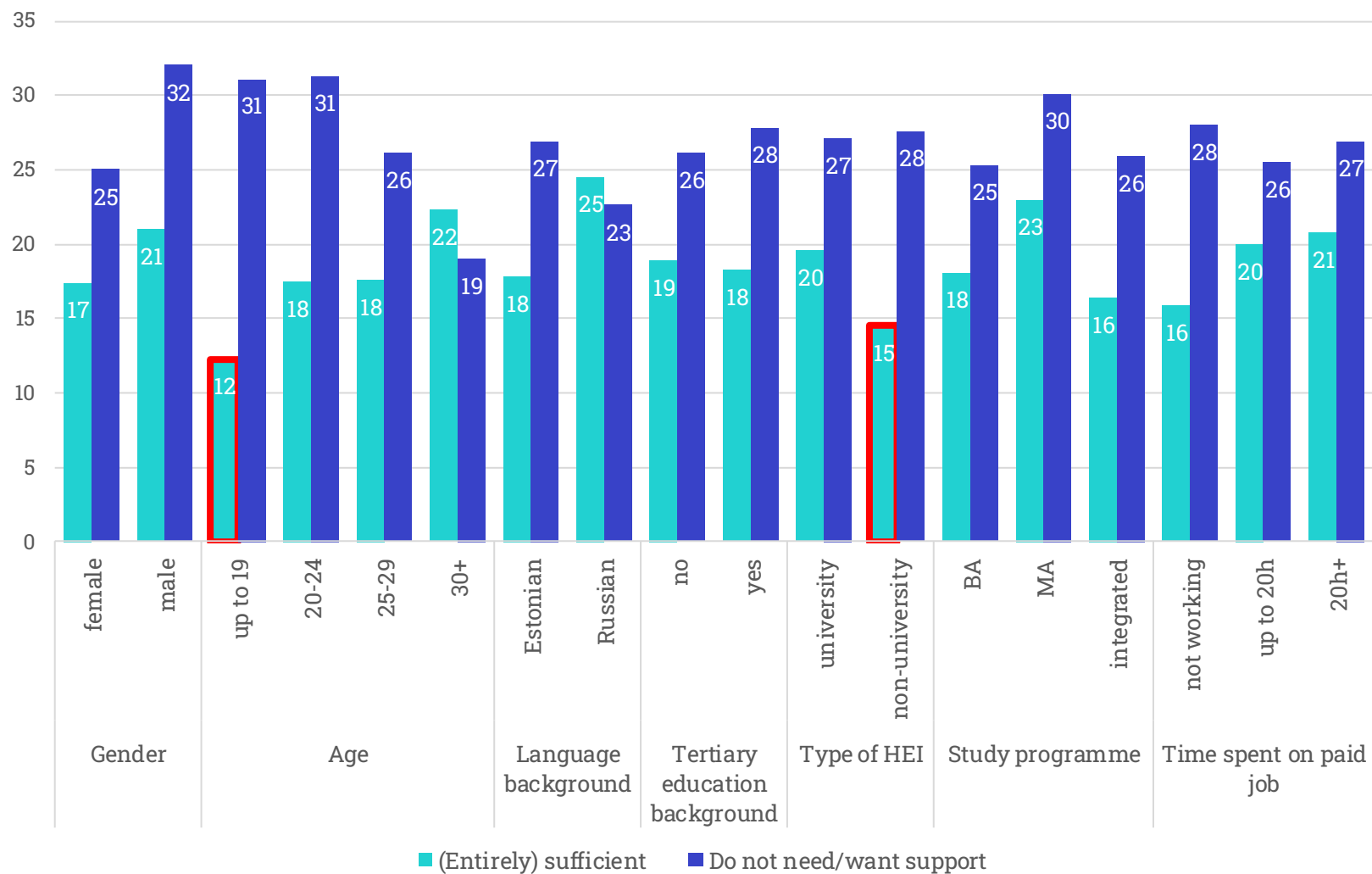
- **Employment remains the main source of students' income** (2022: 65%)
- Students receiving needs-based study allowance:
  - 22% in 2022 → 26% in 2025
- Students taking out a student loan:
  - 3% in 2022 → 4% in 2025
- **Students' financial situation has become more difficult, from 2022 to 2025:**
  - average monthly income has increased by 12%
  - average monthly expenses have increased by 22%
  - average wages have risen by 28%
  - the consumer price index has increased by 20%
- The share of students who perceive (very) serious financial difficulties has increased from 22% in 2022 to 24% in 2025

# Students with impairments



**Figure 3.** Share of students (%) reporting a disability, functional limitation or a health problem. N=4735

- Students with impairments make up **37%**
- Mental health problems the most common impairment
- Substantial rise in the share of students reporting mental health problems:
  - 2016 EVI: 3%
  - 2019 EVII 9%
  - 2022 E8 16%
  - **2025 E9: 21%**
- Rates of students with ADHD has doubled (E8: **22%**, E9: **44%**) among students with impairment limiting in studies



**Do students with impairments receive sufficient support?**

**Figure 4.** Perceived sufficiency of institutional and public support to overcome limitations. Share of students with an impairment limiting in studies (%). N=924

- Has the representation of different student groups (e.g., first-generation students, older students) changed?
- Has the financial situation of students improved? Has working alongside studies decreased?
- How do HEI-level measures influence access for vulnerable groups? Are students with impairments adequately represented in HE? Is the existing support for students with impairments sufficient?

### **Widening access or widening gaps?**

- The current policy framework tends to reproduce existing gaps, highlighting the need for a more comprehensive approach to ensuring equal access to HE.