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• **Trends 2010:**
• **A decade of change**
• **in European Higher**
• **Education**
•
• **BY ANDRÉE SURSOCK & HANNE SMIDT**

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Trends 2010: A decade of change in European Higher Education

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Foreword

Trends 2010 is the latest in a report series contributing to the discussions in the Bologna Process. *Trends* reports are generally timed with the biannual ministerial meetings and track progress of Bologna implementation, within a two-year timescale. *Trends 2010* is different. The report has been timed to coincide with the launch of the European Higher Education Area in March 2010 and has a much larger scope both in its focus and longitudinal aspect.

Not only does the report examine the achievements of Bologna-driven reforms since 2002, but it also situates these reforms within the broader context of a decade of change in higher education. The European higher education environment has been altered significantly as a result of globalisation, a number of international trends and European and national policies. As a result, European higher education institutions have embraced and implemented a complex and deep-reaching change agenda that has affected many critical aspects of their operations.

Much has changed in European higher education. Society's expectations have shaped and altered higher education activities and are now embedded in institutional strategies. Access and participation rates have improved significantly. Graduates' employability is a vital concern. Internationalisation and lifelong learning have become central. Most importantly, despite the upheaval that some of these changes have entailed, the higher education community shows a deep and unwavering commitment to the European Higher Education Area.

Trends 2010 confirms that the Bologna decision-making method – voluntary, cooperating with higher education, students, and other actors – has led to clear advances. Some of the most concrete and rapid changes include the reform of Doctoral education and the European QA framework, both led by the stakeholders. Similarly, the success of national implementation has been often predicated on the involvement of higher education institutional actors and students in national policy development.

Some changes have been slower to effect because they involve a range of conditions – often additional funding – that are not always present. Thus, the paradigm shift to student-centred learning, which is critical to improving education, represents both a cultural challenge to some teaching traditions and a financial one to address costlier requirements such as human resource development, new classroom infrastructures and smaller student-staff ratios.

Thanks to European policy developments, international perceptions of Europe have been altered in ways that were not foreseen ten years ago. Europe is perceived around the world as having developed far-reaching policies for education and research. From the point of view of European institutions, however, there is still room for improving the coordination of these two sets of policies. Historically, European universities view themselves as knowledge-based institutions that produce new knowledge and disseminate it through teaching and innovation. The links between research, teaching and innovation is a critical success factor and is all the more important to knowledge-driven societies. Therefore, the condition for successful change in the next decade requires reinforcing the links in the knowledge chain and placing universities, as institutions, at the centre of European and national policies.

This report was written with several audiences in mind: higher education institutions, students, European and national policy makers, QA agencies and other stakeholders. We hope that the analysis of this decade of change will be useful to all and will launch the European Higher Education Area on the right trajectory, one that will promote research-based education for the 21st century.



Jean-Marc Rapp
EUA President

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Our heartfelt thanks also go to the national rectors' conferences for their response to the questionnaire and their support during the site visits as well as to the 28 institutions that graciously hosted the Trends researchers – some institutions, for the second time – and to their leadership, students, and staff who shared their insights and concerns openly and freely. Special thanks are due to former Minister Vladimir Filippov who opened the doors of the Russian Federation to Trends researchers and to Martina Vukasovic (Center for Education Policy, Serbia) who made possible the first Trends visit in Serbia.

We owe a great debt of gratitude to the Trends researchers who have attended several meetings, conducted the site visits, wrote enlightening reports and provided discerning feedback on our preliminary conclusions. Their long-term commitment to EUA's research work has been invaluable in providing a longitudinal view and assuring a depth of understanding that could not have been achieved otherwise.

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Andrée Surssock and Hanne Smidt

Executive Summary

INTRODUCTION: THE SCOPE OF THE REPORT

1. The aim of the *Trends 2010* report is two-fold. Firstly, to situate and analyse – from the viewpoint of higher education institutions – the implementation of the Bologna Process in the context of the much broader set of changes that have affected higher education in Europe in the past decade. Secondly, to propose an agenda for the future of both the Bologna Process and the EHEA.
2. The report is based on a unique longitudinal analysis of responses to two survey questionnaires to higher education institutions (821 responses) and national rectors' conferences (27 responses), which have been compared to *Trends III* (2005) and *Trends V* (2007) results. The quantitative data were supplemented with qualitative data collected through 28 site visits in 16 countries, two focus group discussions and five semi-structured interviews of regulated professional organisations.

PART I: THE BOLOGNA PROCESS IN CONTEXT

3. Higher education has been affected by a number of changes in the past decade, including higher rates of participation, internationalisation, the growing importance of knowledge-led economies and increased global competition. These changes have resulted in two main European policies: the Bologna Process and the Lisbon Strategy, including the Modernisation Agenda for Universities.
4. Both these broader international developments and the two specific European policy processes have been translated into policy change at national level affecting principally external quality assurance, autonomy, funding and research but also the shape and size of many higher education systems. These fundamental changes, along with the implementation

of the core Bologna reforms, have altered deeply all activities of HEIs, and their partnerships with other HEIs and with their stakeholders, and have at the same time increased their strategic capacity and their professionalism.

5. The Bologna Process has been increasingly embedded in this wider set of European and national policies. Where other national policy changes are at work, the Bologna Process adds yet another layer to a sometimes heavy change agenda. These changes, including those inscribed in the Bologna Process, are deep and significant, often requiring changes in attitudes and values, and always requiring effective institutional leadership. They are time and resource consuming, especially on staff members. Explaining the purposes of the reforms and convincing staff members of their benefits remains a major challenge and crucial to success.

PART II: EUROPEAN HIGHER EDUCATION INSTITUTIONS IN THE BOLOGNA DECADE

6. Higher education institutions and national rectors' conferences continue to be committed to the creation of the European Higher Education Area (EHEA), which they view as being globally positive and beneficial to students and institutions. The Bologna Process has introduced unifying elements that are shared by institutions across 46 countries although the diverse cultural, national and institutional contexts have led to considerable variety in implementation.
7. The Bologna Process has been characterised by a series of 'action lines' and tools that have been developed over the years to make the EHEA a reality and to ensure the realisation of a number of underlying objectives (e.g. mobility, quality and social

agenda). Although the Bologna tools and action lines are interlinked, this has not necessarily been clear to institutional actors because of the evolving nature of the policy agenda.

Degree structures and their acceptance by the labour market

8. A large majority of institutions have implemented the new Bologna degree structure: from 53% of institutions in 2003 to 95% in 2010. In some cases, however, the change has not led to meaningful curricular renewal, but rather to compressed Bachelor degrees that leave little flexibility for students.
9. A range of measures which affect both teaching and learning are being implemented in order to enhance the student experience. These can be seen at all three levels. At the Bachelor level there is a greater emphasis on increasing and widening access, on student-centred learning and on flexible learning paths, with the attendant need for more and better targeted student support services. At the level of the second cycle, the Master degree has been introduced as a new, separate qualification across Europe in the last decade. This has proved to be a very flexible degree, albeit one that is defined differently depending upon national and institutional contexts. At the Doctoral level, the last decade has been characterised by the rapid expansion of Doctoral schools and more attention is being paid to the supervision and training of Doctoral students.
10. Employability has moved increasingly to the forefront of concerns at all levels and poses particular challenges at Bachelor level. It is difficult to assess employers' acceptance of these new first-cycle qualifications because the first graduate cohorts are recent, few institutions track their alumni's employment, and the ISCED 5 band still aggregates the Bachelor and the Master thus hindering detailed statistical analyses of employment patterns. There are strong indications, however, that many institutions expect their Bachelors to continue to the Master's level. Employers seem to accept Masters and Doctorates with relative ease.

Building flexible curricula: tools for implementation in institutions

11. There is some progress in shifting to modularisation, learning outcomes and to student-centred learning but this paradigm shift requires further resources to support smaller student-staff ratios, adapted classrooms and staff development.

12. Implementation of ECTS continues to spread but is not always used for both transfer and accumulation. Use of the Diploma Supplement is growing but it seems to be relegated to an administrative function and disconnected from new developments such as learning outcomes and qualifications frameworks. These must be integrated in the Diploma Supplement, as recommended in the 2007 amended guidelines, and it must engage academics.

European frameworks at system level

13. Progress is being achieved in developing national qualifications frameworks (NQF) but institutions' understanding seems low particularly with respect to the importance of learning outcomes and of their central role within qualifications frameworks and in facilitating mobility and lifelong learning (through RPL). There have been some rare and very successful efforts, at national level, to delegate to institutional actors, through their rectors' conferences, the task of discussing (but in some cases also developing and implementing) NQFs.
14. Almost all Bologna signatories have QA agencies or have reformed their QA approaches, but without necessarily making explicit the link to the European Standards and Guidelines (ESGs), or taking into account the enlarged scope of institutional autonomy and the expressed need of HEIs to be more strategic and contribute effectively to the knowledge society. In this context, several national QA trends are worth noting. These include the predominance of QA at the programme level, the accumulation of QA procedures, and the spread of accreditation. Institutions respond primarily to their national external quality requirements and these have not always stressed the responsibility of HEIs in this area. Finally, relatively few rectors' conferences seem involved in national QA developments.
15. The ESGs and the European Quality Assurance Register (EQAR), both developed by the 'E4' group of stakeholders, have had a positive impact, primarily in internationalising the review panels, ensuring the participation of students, and further professionalising QA agencies. To ensure more effective implementation and commitment, it is critical that the ownership of the ESGs continues to rest with the stakeholders. Responsibility for any revision of the ESGs must continue to lie with the E4 Group.

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Responding to the challenges of lifelong learning, widening participation and access

16. In the majority of European countries, lifelong learning is considered as a set of activities provided outside mainstream education, in relation to which Bologna tools such as learning outcomes and academic credits are only rarely defined or attached. Therefore, there is a clear need for European HEIs and national authorities – together – to connect policies in order to create accessible, flexible and transparent student-centred learning and to monitor and evaluate implementation continuously. This is necessary in order to ensure that all education provision is seen within a lifelong perspective and in specific national, regional, local and institutional contexts. The joint approach advocated in EUA's Lifelong Learning Charter, requiring the joint commitment of governments and HEIs, is essential in order to achieve success. It will also be important to act together at regional level and promote cooperation between regional stakeholders, including employers and HEIs.
17. *Trends 2010* data show that an increasing number of European HEIs have begun to rise to the challenge of attracting and teaching a more diversified student body, and to introduce institutional policies which are more inclusive and responsive. To enhance further the development and the potential success of the social dimension of the EHEA it will be vital for both national authorities and HEIs to be able to collect data on the social background of students and their attainment.

Internationalisation

18. Internationalisation has been identified by HEIs as the third, most important change driver in the past three years and is expected to move to first place within the next five years. More institutions are developing an integrated internationalisation approach to teaching and research through a focus on strategic

partnerships. However, it is yet unclear whether this strategic approach will prevail over the more traditional form of 'bottom up' cooperation initiated by individual academics.

19. The priority geographical areas for international exchange have not changed much since *Trends V* (2007). The EU and Europe more generally remain the first and second choice; Asia keeps its third place; the US and Canada their fourth place and Latin America the fifth. The Arab world and Africa remain the lowest priority areas for higher education institutions across Europe, followed by Australia which has been losing ground since 2003.
20. Given the current limitations of mobility data, tentative conclusions regarding student mobility can be drawn based on the *Trends 2010* survey: institutional expectations regarding short-term mobility seem to have remained stable while the expectations for full-degree (vertical) mobility seem to be growing; the imbalance of mobility flows between East and West has remained unchanged since *Trends III* (2003). The report provides a rich documentation of institutional experience regarding obstacles to mobility which include visa or language requirements, compressed degrees, lack of funding, lack of harmonisation of academic calendars across Europe, etc. However, mobility, particularly as a period of study abroad during the Bachelor, will remain a challenge unless it is central to the institutional internationalisation strategy.
21. Recognition of credit transfer is a central issue in the promotion of mobility and one of the core Bologna action lines. *Trends 2010* results show minimal improvement over the decade except when recognition of study abroad periods is a centralised function in institutions. This leads to fewer problems, probably because centralisation provides a consistent and coherent way of dealing with credit transfer.

Conditions for proper implementation in institutions: student services and internal quality

22. The importance of student services has been relatively ignored as policy priority throughout the Bologna decade even although it is central to the shift towards a student-centred approach and to a stress on student attainment. The *Trends 2010* questionnaire data on this topic and the site-visit reports suggest that career guidance is the fastest growing area, followed by growth in psychological counselling services. This indicates that the focus is moving, to a certain extent, from providing student guidance primarily during the pre-admission phase to improving student retention and preparing students for employment.
23. The organisation of student services vary: in some countries, these responsibilities are shared by a variety of bodies, thus requiring good collaboration at national, regional and local level. As their primary responsibility HEIs need to ensure that students have access to the services they need. It is also incumbent upon institutions to establish local and national links where necessary, e.g., by pooling resources with other HEIs and cooperating with national and local bodies and student organisations that have responsibilities in this area.
24. For 60% of HEIs, one of the most important changes in the past ten years has been enhanced internal quality processes. This is true particularly for institutions that are interested in European partnerships and those that deliver the Doctorate. The site visits confirm that many quality procedures are in place, often managed at faculty rather than at institutional level. As a result, there is wider ownership of quality processes and the concept of quality culture is reaching down. However, there is not always a clear feedback loop to the institution's strategic orientation. In addition, while staff development measures to improve teaching are in place in many institutions, these are not found everywhere. Thus, while good progress has been achieved, internal quality needs to be approached in a more integrated and comprehensive fashion.

Bologna Process: key challenges

25. Looking back over a decade of reform, it is clear that a great deal of progress has been made in the field of higher education but that the rapid implementation of

'Bologna tools' peaked around 2007. The next phase will be to deepen the change process by creating new organisational cultures. This means using the existing architecture, quality infrastructure and the Bologna tools more broadly at national and institutional level while situating them clearly within institutional and national priorities, and resource constraints.

26. The Bologna Process should be regarded as means to an end: its main goal is to provide the educational component necessary for the construction of a Europe of knowledge within a broad humanistic vision and in the context of massified higher education systems; with lifelong access to learning that supports the professional and personal objectives of a diversity of learners.
27. The different elements of the Bologna reforms have evolved through time, and have sometimes led to a fragmented and instrumental view of education that has not always facilitated understanding in institutions of the important links between the various elements. This can be improved if the tools are seen as being interconnected, and as a means of moving towards student-centred learning.
28. Greater – coordinated – communication efforts are needed. They should be centred on the benefits of the reforms to students, academics, employers and society at large.
29. Data collection at institutional, national and European levels must be improved. This concerns data on mobility (including 'free movers' and full-degree mobility), employability (students' entry in the labour market and their career development over several years), student-staff ratios at all degree levels, graduation and drop-out rates, time to degree, recognition of prior learning, and students' socio-economic backgrounds. In addition, given changing demographic trends, institutional analyses of staff data (by age, gender and status) are crucial in order to plan for the future.
30. Successful implementation of Bologna is partly conditional on the capacity of institutional leaders to bring institutional coherence to a multi-dimensional change agenda, and to explain, persuade and motivate staff members, and students. Therefore, emphasis should be placed on institutional responsibility in the further

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implementation of the Bologna Process and HEIs should have considerable scope in implementing the change agenda, which they must be able to relate to their specific mission and objectives, thereby respecting institutional diversity.

31. The success of Bologna has hinged on the involvement of all actors, including students and institutions, in policy discussions. This *modus operandi* at the European level must continue and be strengthened at the national and institutional levels in order to meet the ambitious objectives set for Europe.

PART III: A FOUR-POINT AGENDA FOR THE EHEA

32. The report shows that European higher education institutions have changed in deep and significant ways in response to international trends and European policies, including the Bologna Process, which was examined through the prism of student-centred learning and the imperatives of ensuring both social cohesion and quality. Part III proposes a set of future policy priorities for the EHEA, based on the preceding analysis.
33. Institutional strategic orientations and European and national higher education policies would be enormously helped if they are framed within a broad vision of the society of the future and of its educated citizens. This would help institutions to exploit fully the link between the different elements of the Bologna Process and to engage in the required curricular and pedagogical renewal that the shift to student-centred learning entails – a renewal that must be cast within a lifelong learning perspective, and with the goals of widening and increasing access.
34. Quality has been at the heart of the Bologna Process as demonstrated by institutional quality developments. The European Standards and Guidelines (ESGs) were developed to support diversity across – and within – 46 countries while adhering to unifying principles and values. These common ‘standards’ are framed in such a way as to promote quality levels through the central role of HEIs. The current stress on indicators in the Bologna Process should not overshadow the importance of keeping a balance between accountability and improvement, quality measurement and quality assurance, and a thoughtful articulation between what needs to be done internally (at the level of institutions) and externally (by governmental or quasi-governmental agencies).
35. The Bologna Process has had multiple and positive impacts on European higher education identity within Europe and beyond. The growing European identity in the world – while strong at policy level – still seems to leave practical aspects of institutional behaviour unaffected. There is little joint European cooperation outside Europe, with each European country pursuing its own internationalisation strategy despite the “Global dimension strategy” adopted at the 2007 Bologna Ministerial meeting. In addition, the question as to whether European cooperation will not be diluted in internationalisation will require monitoring in future years.
36. Both the EHEA and the ERA create opportunities and responsibilities for European HEIs. It will be important to strengthen the links between the European higher education and research areas to enhance one of the singular strengths of European higher education – the unique role of universities in ensuring a close interface between education, research and innovation. To meet these objectives EUA will also continue to advocate for closer links between the EHEA and the ERA and thus for a European Knowledge Area crucial for universities to be able to educate graduates equipped with the high level skills Europe needs for the knowledge societies of the 21st Century.

List of Acronyms

| | |
|---------------------|--|
| ACE | Architects Council of Europe |
| APCL | Accreditation of Prior Certificated Learning |
| APEL | Accreditation of Prior Experimental Learning |
| APL | Accreditation of Prior Learning |
| BFUG | Bologna Follow-Up Group |
| CED | Council of European Dentists |
| CPME | Standing Committee of European Doctors |
| DS | Diploma Supplement |
| E4 Group | ENQA, ESU, EUA and EURASHE |
| EC | European Commission |
| ECTS | European Credit Transfer and Accumulation System |
| EHEA | European Higher Education Area |
| ENIC | European Network of Information Centres |
| ENQA | European Association for Quality Assurance in Higher Education |
| ERA | European Research Area |
| ERC | European Research Council |
| EQAR | European Quality Assurance Register for Higher Education |
| EQF-LLL | European Qualifications Framework for Lifelong Learning |
| ESG | Standards and Guidelines for Quality Assurance in the EHEA |
| ESU | European Students' Union (previously ESIB) |
| EU | European Union |
| EUA | European University Association |
| EURASHE | European Association of Institutions in Higher Education |
| EWNI | England, Wales and Northern Ireland |
| FEANI | Fédération Européenne d'Associations Nationales d'Ingénieurs |
| FEDORA | European Forum for Student Guidance |
| FVE | Federation of Veterinarians of Europe |
| HE | Higher Education |
| HEI | Higher Education Institution |
| ISCED | International Standard Classification of Education |
| ISO | International Organization for Standardization |
| LLL | Lifelong Learning |
| MBA | Masters in Business Administration |
| NARIC | National Academic Recognition Information Centres |
| NQF | National Qualifications Framework |
| OBSERVAL | European Observatory of non-formal & informal activities |
| OECD | Organisation for Economic Co-operation and Development |
| PGEU | Pharmaceutical Group of the European Union |
| PRES | Pôle de recherche et d'enseignement supérieur |
| QA | Quality Assurance |
| QF-EHEA | Framework for Qualifications of the European Higher Education Area |
| RPL | Recognition of prior learning |
| TNE | Transnational Education |
| UNESCO-CEPES | European Centre for Higher Education/Centre Européen pour l'Enseignement Supérieur |
| WBL | Work-Based Learning |

Introduction - Aims and Methodology

A familiar part of the Bologna landscape is the Trends report series, prepared by EUA, and of which this is the latest. The main aim of the Trends 2010 report is to analyse – from a higher education institution perspective – ten years of change in European higher education in the context of the Bologna Process and of the broader changes that are taking place within it. It endeavours to trace European and national developments and their impact on institutions and to set priorities for the future.

Given this complex aim, the *Trends 2010* report adopted the multi-method approach used previously in the *Trends V* report. It embraces both quantitative (two surveys) and qualitative methods (site visits, focus group discussions and semi-structured interviews) within a longitudinal analysis based on the results of *Trends III* (2003), *Trends IV* (2005) and *Trends V* (2007).

While the surveys were the appropriate method to achieve breadth of coverage and analysis by exploiting the full strength of the rich longitudinal data, the qualitative methods were required in order to achieve depth. The context setting added substance and helped interpret the quantitative data. The combination of data collection methods offers a valid and reliable approach that allows a deeper understanding of how the Bologna Process impacts on institutional development, an examination and contextualisation of this understanding within diverse national developments, and an exploration of future challenges and opportunities.

Two surveys were administered. The first was addressed to the 34 national rectors' conferences, members of EUA (mostly from EU member states): 26 replied, plus Universities Scotland, which complemented the response of Universities UK. The main aim of this questionnaire was to collect contextual information on recent national legislation and policy developments and progress of the various Bologna action lines over the past ten years. The responses were

most enlightening to understand the national contexts and how national and European policy developments articulate with each other, and many respondents took the time to provide long and detailed answers to some of the questions. The questionnaire and a list of the national rectors' conferences that responded can be found in Appendix 3.

The second questionnaire was addressed to higher education institutions (HEIs) and was conducted via email between November 2008 and March 2009. The recipient list included: national rector's conferences and a number of other organisations that were requested to encourage their members to respond as well as EUA members. A total of 821 individual institutions replied, representing about 15% of European HEIs. More than 70% are universities offering doctoral education and the sample represent 43% of students enrolled in European HEIs (58% if Russia and Ukraine are excluded because of their low response rate). 187 of these institutions had also responded to *Trends III* and *Trends V*.

Where national information of data is displayed, several countries have been excluded either because no responses were received (Albania, Azerbaijan, Montenegro, and Liechtenstein) or there were not enough responses to give a reliable picture of national trends. These include Bulgaria (4 responses), Moldova (1 response), Ukraine (12 responses) and Russia (16 responses), but site visits were conducted in two large, research-intensive Russian HEIs. A copy of the *Trends 2010* questionnaire is included in Appendix 1 and information on the country distribution of respondents can be found in Appendix 2.

An essential part of this report is the analysis of the longitudinal data that allowed us to compare the institutions' perceptions of the Bologna Process collected at three different points in time: in 2002 (*Trends III*), 2006 (*Trends V*) and 2009 (*Trends 2010*). A great number of questions from both *Trends III* and *Trends V* are repeated in the *Trends 2010* questionnaire. Although

obviously useful, the longitudinal aspect of the study was also constraining in that even if the context had changed, the wording of some questions needed to be respected. Additional constraints are common to many quantitative surveys: the response depends on the specific role and general knowledge of the respondents and their understanding of the questions. The latter is particularly challenging from a linguistic perspective when a survey in English (with a French and Russian translation) is administered in such a large number of countries.

In addition to the two questionnaires, this report also draws upon qualitative data collected through the site visits to 28 institutions in 16 countries undertaken between March and October 2009. The institutions were not selected randomly but chosen usually in consultation with the respective national rectors' conferences. The selection criteria took into account various factors such as the timing of implementing the Bologna Process, the need to ensure a relative geographical spread (within the available project resources) and to include both small and big institutions, university and other higher education institutions as well as more comprehensive and more specialised institutions. Given the longitudinal character of the study and the profiles of the researchers (many of whom had been involved in previous Trends visits), it was important to include institutions that were visited in *Trends IV* or *Trends V* as well as totally new ones. The sample lays no claims to national representativeness, but provides rich insights into the challenges and opportunities faced by institutions of higher education in Europe. A list of site visit research teams and institutions visited can be found in Appendix 4.

For the first time, Trends researchers were able to visit two Russian institutions and get a first-hand view of Bologna implementation. In view of the exceptional nature of these site visits, a specific subsection was developed to provide insights in how two Russian institutions are changing thanks to governmental policies and the interest of their institutional leadership in the Bologna Process (Appendix 7).

The site visits were critical in that they allowed us to verify and interpret the quantitative data as well as building upon information collected through the questionnaires. Each site visit lasted one day and a half and was conducted by teams of two experienced international researchers, accompanied by a

national expert usually recommended by the national rectors' conference. The discussions were led by the international experts, with the national expert assisting in providing contextual information and any clarification. Researchers were given a list of themes to guide their discussions, and were asked to write an analytical report that reflected the importance attached to various issues in each institution rather than reporting on every aspect. The teams met a range of relevant actors including: institutional leaders (rector, vice-rectors, and deans), academic and administrative staff, and students from all three cycles. After a preliminary analysis of the quantitative data and the site visit reports, the researchers were gathered to test the preliminary hypotheses that had been developed.

In addition to the site visits, qualitative data were also gathered through two focus group discussions: one with FEDORA (European Forum for Student Guidance), the other with representatives of the OBSERVAL project, and six semi-structured telephone interviews with the representatives of some of the regulated professions (e.g., engineering, medicine, etc.). Further information on this strand of activities can be found in Appendix 5.

Finally, the report draws upon other recent EUA studies as well as reports that have been prepared by other organisations for the 2009 Leuven/Louvain-la-Neuve inter-ministerial meeting (cf. Reference list).

The report is divided into three parts. Part I sets the context and is based primarily on the national rectors' conferences' questionnaire and other available studies and then on the HEIs' questionnaire. It examines the various processes driving forward change at the institutional level and draws out the complex interplay between these forces and how they manifest themselves in the current higher education institutional landscape.

Part II analyses the progress made towards its overall objectives in the last decade with a particular focus on the last three years. It is primarily based on the information gathered through the two questionnaires, site visits, the focus group discussion and the interviews. It identifies key findings and challenges related to each section.

Part III sets out a four-point agenda, based on the preceding analysis. It highlights a number of policy considerations and presents priorities for the future.

1 A decade of change in European Higher Education – context setting

One of the goals of the Trends 2010 report is to situate and analyse – from the viewpoint of higher education institutions – the impact of the Bologna Process in the context of the much broader set of changes that have affected higher education.

Thus, Part I sets the Bologna Process in a wider context. It highlights in a summary fashion other European policies, national change processes and international trends that have been affecting institutions in the past decade. It is primarily based on EUA activities (studies, projects and conferences), some of the research literature on higher education, and the results of 27 (out of 34) EUA member national rectors' conferences responses to the *Trends 2010* questionnaire as well as some elements of the HEI's survey (cf. Introduction).

Despite the unifying elements shared by institutions across Europe, this type of exercise has its perils. It would be untenable to venture generalisations that would be applicable to each of the 46 signatories of the Bologna Declaration whose higher education sectors differ if only because of their geopolitical positions, current economic situations and historical trajectories. Even within a single national system, institutions are different from one another in their missions and profiles, the strategic choices they can and

do make, their local and regional contexts, the degree to which they are embedded in their communities, or their ability to read the signs of the time accurately and to adapt to them. Finally, the multi-functionality of higher education institutions and the complexity of their missions result in differences across faculties and departments that would prevent valid generalisations even within one institution. These variations emerge clearly from the Trends data: the implementation progress of the Bologna Process cannot be simply analysed along country lines. A more powerful magnifier is needed to understand the change, as can be seen in Part II.

Although there can be no master-narrative of European higher education and the changes presented in the following sections do not strictly apply to all, it is likely, nonetheless, that they identify the common pressures faced by European higher education institutions and the general direction of change. It is hoped that the unique approach taken here – setting the Bologna Process in the context of the wider changes that have taken place in the past ten years and presenting these changes from the point of view of the institutions themselves – sheds interesting light on a decade of policy changes in Europe and on the conditions that have affected the implementation of the Bologna reforms.

1.1 The Brave New World of higher education: European responses to international trends

For the past ten years, higher education institutions have been buffeted by a complex set of international pressures. Foremost among them is the growing importance of knowledge-led economies that have placed higher education at the centre of national competitiveness agendas. Higher education institutions are increasingly viewed by policy makers as 'economic engines' and are seen as essential for ensuring knowledge production through research and innovation and the education and continuous up-skilling of the workforce.

Combined with increased globalisation – i.e.,

“the widening, deepening and speeding up of worldwide interconnectedness” (Held et al 1999: 2) – the pressures to respond to regional and national economic agendas, offer new opportunities for institutions, or some units within them, to choose to become entrepreneurial, compete on the international or national stage, and contribute to their region or – on a smaller scale – to their immediate surroundings.

The competitive context that results from both the rise of knowledge-based societies and increased globalisation has multiplied and deepened the links of higher education

institutions to the world around them. They are no longer, if they ever were (medieval university notwithstanding), the ivory towers of years past but are increasingly connected – through regional, national or international networks and partnerships – to a broader range of stakeholders and constituencies as well as to other higher education institutions at home and abroad.

The growing web of stakeholders and the expansion and massification of higher education have resulted in the perceived necessity to diversify the sector and to sharpen institutional profiles, priorities and strategies, with the view that – singly and collectively – higher education institutions should be able to respond better to a variety of needs and requirements. The diversification agenda has been implemented with some measure of success in some countries while, in others, conflicting policies have led to mission drift and mission stretch (Reichert 2009).

Globalisation and the imperatives of the knowledge society, which are affecting higher education almost everywhere in the world, have been translated into two overarching European policies: the Bologna Process and the Lisbon Strategy and its successor strategy: “EU 2020”, which will be finalised in spring 2010 (EC 2009).

The launch of the Erasmus Programme in 1987 (following a six-year Joint Study Programme) and the Bologna Declaration in 1999 were the first early signals of the need to organise and structure European higher education as a response to globalisation. Teichler (2004: 4), for instance, speaks of “Europeanisation” as “the regional version of internationalisation or globalisation”. Indeed,

the Bologna Declaration (1999) states as one of its central objectives the enhancement of “the international competitiveness of the European system of higher education”. On the heels of the Bologna Declaration and its objective of creating a European Higher Education (EHEA), the European Commission launched the European Research Area (ERA). Both the EHEA and the ERA aim at creating a common area for students and academics to move about as a basis for the political strengthening of Europe.

The Lisbon Strategy aims to transform Europe into the most competitive knowledge economy in the world, through more emphasis on research and innovation, and expanded access to education and lifelong learning opportunities. The recognition of the importance of higher education institutions and their transformation through the “Modernisation Agenda”, i.e., enhanced autonomy and improved governance (EU 2006), has become central to achieving these objectives.

The competitiveness objective, however, should not obscure the full scope of the European project, which was stated clearly in both the Bologna Declaration and the Lisbon Strategy. The Europeanisation agenda is viewed by many actors as one of the cornerstones of European political construction. Both promote social inclusion, albeit in different ways and with different emphases. Less importance is attached to the social dimension in the Modernisation Agenda that is derived from the Lisbon Strategy than in the five Bologna Communiqués agreed by Ministers hitherto, each of which refers to higher education as a public responsibility and the ‘social dimension’ (equity and access) of higher education as central to this agenda.

1.2 The metamorphosis of European higher education

1.2.1 Key policy changes

European higher education has been in a state of rapid flux for the past ten years – some of it as a result of factors beyond any actor’s control – and the pace of change is only accelerating. The national rectors’ conferences were asked to choose the three most important policy changes that have been implemented in their country, alongside the Bologna Process. The changes most frequently identified are:


- Reform of quality assurance: 18 countries
- Research policies: 15 countries
- Expansion of institutional autonomy: 12 countries
- Funding reforms: 12 countries










The following figure takes into account the new policies that have been voted even if not yet implemented by November 2009. In addition, while all responses are from the rectors’ conferences, the Serbian response was provided by a Serbian Higher Education expert.

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Table 1. Q11. Beside the Bologna Process, what have been the three most important reforms that have been implemented in your country?

| Country | Funding | Autonomy | QA | Research policies |
|--|---------|----------|----|-------------------|
|  AT Austria | | ● | ● | |
|  BE-FR Belgium Wallonie | | | ● | ● |
|  BE-NL Belgium Vlaanderen | ● | | | |
|  CZ Czech Republic | ● | | | ● |
|  DE Germany | | ● | ● | ● |
|  DK Denmark | ● | | ● | |
|  EE Estonia | | | ● | |
|  ES Spain | | ● | ● | |
|  FI Finland | ● | ● | | |
|  FR France | | ● | ● | ● |
|  GR Greece | | | ● | ● |
|  HU Hungary | | | | ● |
|  IS Iceland | ● | | ● | ● |
|  IE Ireland | | | ● | ● |
|  IT Italy | | ● | | |
|  LT Lithuania | ● | ● | | |
|  LU Luxembourg | ● | ● | | ● |

| Country | Funding | Autonomy | QA | Research policies |
|---|---------|----------|----|-------------------|
|  LV Latvia | | ● | ● | ● |
|  NL The Netherlands | ● | | ● | |
|  NO Norway | ● | ● | ● | ● |
|  RS Serbia | | | ● | |
|  PL Poland | | ● | ● | ● |
|  SK Slovakia | | | ● | ● |
|  SL Slovenia | ● | ● | ● | ● |
|  UK - EWNI United Kingdom – England, Wales, Northern Ireland | ● | | | ● |
|  UK United Kingdom - Scotland | ● | | ● | |

Other changes, albeit less often mentioned, include governance reforms, new career structures, new entry requirements to the different cycles, and innovation policies.

Eighteen countries report major changes in the size and shape of higher education systems: eight rectors' conferences (AT, CZ, ES, GR, IT, PL, SK, SL) report a significant increase in the number of institutions (mostly church-funded or not-for-profit and for-profit private institutions) while institutions in eleven countries are undergoing (or have undergone) mergers or have been brought together under federated structures (BE-FR, FR, DE, DK, EE, FI, HU, IC, NO, SE, SL).

In addition to the global changes undergone by higher education during the last decade, both the new member states of the EU and the non-EU members have had access to specific streams of funding (e.g., European structural funds, World Bank) and have been involved in massive higher education reforms in which the Bologna Process played an important role as a driver and a framework for reforming within a European context.

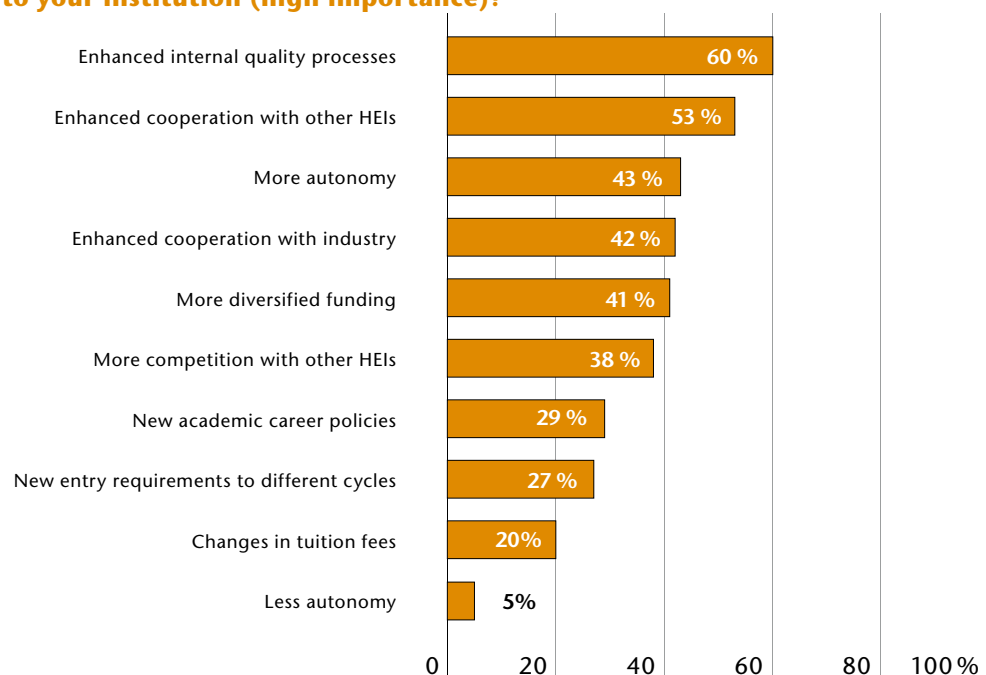
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The following figure, based on the *Trends 2010* institutional questionnaires, shows the changes that have had most importance to institutional development in the past ten years:

Both enhanced internal quality processes and cooperation with other HEIs receive the highest values, indicating how aware European HEIs are of the need for effective institutional steering in order to be attractive internationally.

Table 2. Q8. Over the last ten years, how important have the following changes been to your institution (high importance)?



1.2.2 Key institutional challenges

Both public and private funding levels for higher education have risen in the past ten years in Europe but so has the number of students. Some European countries have increased per-student funding; others, particularly in Western Europe, have not (OECD 2008). Moreover, despite the expressed commitment of governments to regard education as a public service, additional funds – if provided – have generally been inadequate to implement European or national policy changes and reach the ambitious goals. Thus, only 12 countries

have made available extra funding (sometimes on a competitive or on a one-off basis) for the implementation of the Bologna Process (BE-FR, CH, CZ, DE, ES, FI, GR, HU, LU, NL, NO, SL), although in five cases (BE-FR, DE, NL, NO, SL), the rectors' conferences consider that the funding levels have been insufficient.

Furthermore, overall participation rates in higher education have increased by 25% on average between 1998 and 2006 – or even more, as in Poland where enrolment increased by 90% during this period – albeit with significant differences across countries and across disciplines, with science and technology fields losing their attractiveness.

Most importantly, graduation rates have improved for the full-time traditional student (EU 2009b: 18), “reflecting perhaps the lower wastage rates which were one of the (implicit) objectives of the move to a Bachelor’s/Master’s pattern as a result of the Bologna process” (Scott 2009b: 8). Thus, growing participation rates and attention to improving graduation rates have accompanied the implementation of the Bologna structures and supporting tools.

Participation of women has progressed, with a European average of 123 women enrolled for every 100 men (Eurydice 2009), although the participation of women is uneven across institutional types, disciplines or study levels (Scott 2009b: 11). Finally, the response of institutions to the *Trends 2010* questionnaire shows increasing attention to three sets of ‘non-traditional’ students: institutions have policies to address the needs of students with disabilities (78%), socio-economically disadvantaged students (69%) and part-time students (60%). Ethnic minorities and immigrants receive little attention (28% and 24%, respectively), perhaps because they are often subsumed under ‘socio-economically disadvantaged’. To document the diversity of the student body is a continuous challenge for HEIs in some countries that forbid the collection and use of such data.

Future demographic changes can be expected to affect European higher education. A recent study revealed that the number of 10-14 year olds in the EU is expected to fall by 15% between 2000 and 2020, resulting in a drastic reduction of the school-going population (Eurydice 2009), with a potential domino effect on higher education. The professoriate in higher education is greying and the ‘baby boom’ generation is going into retirement. Because these trends are uneven within a country (causing rural brain drain in some) and across Europe, they may lead to an exacerbated ‘brain war’ for students and academic staff, within Europe, at a time when the global competition for talents is heating up and international ranking schemes are proliferating and forcing institutional leaders to rethink their positioning within the global higher education community.

Expected results will be improved access and participation rates as well as increased international competition through a focus on strategies based on assessments of institutional strengths, marketing at international and national levels as well as greater cooperation between institutions, particularly in research and at the Master and Doctoral levels.

The combination of international trends and European and national policies have resulted in a series of changes affecting deeply the different missions of higher education in Europe and consequently institutional governance and management.

Education

Prompted primarily by the Bologna Process, a range of measures affecting teaching and learning are being implemented in order to enhance the student experience. These are in evidence at all three levels:

- At the Bachelor level, with the stress on greater and wider access, student-centred learning and flexible learning paths, with its attendant impact on student support services.
- At the Master level, with the significant development of the Master as a new separate qualification level (and often more flexible degree) across Europe in the last decade, albeit one that is defined differently depending upon national and institutional contexts (EUA 2009a).
- At the Doctoral level, with the rapid expansion of Doctoral schools and more attention paid to the supervision and training of Doctoral students.
- At all three levels, with a renewed emphasis on learning outcomes, employability, mobility, quality and internationalisation (for a more detailed examination of these issues, cf. Part II).

Last but not least, with external pressures growing (such as unemployment, skills-upgrading needs and broadening participation) lifelong learning is moving higher up institutional strategic agendas. Thus, a majority of national rectors’ conferences report that their countries and institutions have lifelong learning strategies in place, although definitions of lifelong learning provisions can vary. Because lifelong learning provision relies sometimes on innovative teaching, it carries the potential of improving institutional pedagogical practices for all learners.

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Research and innovation

The concerns to make Europe more competitive on a global scale have led to growing awareness of the role of universities as research institutions at national and European levels, in the context of the consolidation of the European Research Area (ERA). Moreover, the new Lisbon Treaty includes reference to the ERA, thus changing the policy framework as of December 2009.

- This has led to competitive pan-European funding for basic research as evidenced by the creation of the European Research Council (ERC) in 2007. The ERC has enlarged research funding beyond the European framework programmes and reflects the need to promote excellence in basic research on a competitive basis at European level, thus building upon the expansion of funding at national level by providing a new set of criteria for funding allocation, including a demonstrated anchoring of research projects in institutional strategies. One of the aims of the ERC is to defragment the European research landscape in order to increase its competitiveness.
- The growing number of mergers is, in some cases, the sign of a perceived need to be competitive internationally through increasing research critical mass. An example is the French PRES (pôle de recherche et d'enseignement supérieur), a national incentive scheme that funds projects aimed at enhancing research critical mass at local or regional level by promoting closer cooperation among higher education institutions and other research organisations.
- The attention paid to the Doctorate level – whether in providing transferable skills, complementing the traditional one-to-one apprenticeship with multiple supervision and Doctoral schools, etc. – and the establishment and quick acceptance of the Council on Doctoral Education within EUA are evidence of the growing concern with strengthening the research capacity of Europe through better attention to pipeline issues and young researchers' careers.

- The growing importance of innovation and entrepreneurship has led observers to comment (e.g., Gibbons et al 1994) that universities have lost their monopoly on knowledge production and that a new type of research has developed. "Mode 2" is characterised by new forms of transdisciplinarity and partnerships, and is more socially responsive, accountable and reflexive than was "Mode 1" research. More recently, others have claimed that the new organisation of research can be represented by a "triple helix" that includes universities and public and private partners. The triple helix thesis and, more recently, the knowledge triangle (integrating education, research and innovation) have had great influence on European Union policies (e.g., the European Institute of Technology) and on regional and national strategies. The growing interest of regional authorities in higher education and research is also resulting in additional funding streams to higher education and greater diversity of institutional profiles (OECD 2007; Reichert 2006). The diversification of partnerships is an important trend that brings with it specific challenges to institutional leadership (cf. below).

Competition and cooperation

Globalisation has intensified competition, as evidenced by the growing number of international ranking schemes and the attention paid to them, but competition has also led to the burgeoning of partnerships.

Cooperation takes many shapes and forms such as in engaging public and private actors or the local community in the life of institutions. Thus, employers' engagement in higher education is growing, whether through their involvement in external boards and visiting committees, research contracts or provision of internships.

Other types of partnerships tie an institution with other higher education institutions – locally, regionally, nationally and internationally – to improve critical mass in research, enrich educational offer (through joint degrees for instance) and

enhance institutional reputation and international reach. The most extreme example of this partnership strategy at local level is resulting in a number of mergers – initiated by governments or higher education institutional leaders. Many national research councils have also been promoting larger research structures with consortia arrangements between research partners creating critical mass and enhanced international visibility.

It is becoming clear that creating small international and European networks is a strategy frequently chosen by institutions to boost their visibility and combine strengths. These networks, which are increasingly used as institutional status markers, provide face-to-face opportunities for exchange and partnerships as well as a better understanding of the situation of higher education worldwide. The creation of international franchise programmes or branch campuses, in cooperation with local actors, is also part of this internationalisation trend.

Internationalisation, which was traditionally measured by the number of exchange students and bilateral agreements, is now viewed more strategically and qualitatively. After the rapid expansion of EU-promoted partnerships, cooperation has moved from the individual academic or department level to be part of the overall institutional strategy. Ten years ago, HEIs used to boast about the number of their cooperation agreements. Today, more attention is being paid to quality rather than quantity of partnerships and there is greater critical awareness for the need to select partners carefully and purposefully. Thus, national rectors' conferences' response to the *Trends 2010* questionnaire reveals that international strategies are fairly widespread at both national and institutional levels. In the best institutional cases, internationalisation is seen as a purposeful extension of institutional strengths and the strategic junction where the various strands of institutional activities are enhanced through international cooperation.

Impact on institutional leadership and governance

There is heightened awareness among university leaders and policy makers that institutional autonomy is the keystone for an effective and efficient higher education sector able to respond to the changes and challenges outlined above (cf. the various declarations resulting from the biannual EUA conventions). A growing number of European countries have enacted new legal frameworks to entrust institutions with higher levels of autonomy, including the strategically important capacity to manage

their budgets and their staff members' careers (EUA 2009b).

The main challenges to institutions and to institutional leaders as these changes take place are as follows:

- In some countries, governance reforms have included a shift from elected, internal boards to appointed, external ones and from elected university presidents or rectors to board-appointed ones that give power to external stakeholders to scrutinise and question institutional activities. A recent EUA study notes, however, that the role of external stakeholders remains controversial. They are seen as either "showing too little interest and commitment to university affairs, or considered to have too much control over academic issues" (EUA 2009b: 40).
- 43% of HEIs identified expanded autonomy as one of the major changes in the past decade. However, national rectors' conferences have identified a range of challenges in making this a reality, including: short-term or low levels of public funding, which makes planning difficult; line-item budgets; lack of ownership of university buildings; limitations on universities' employment policies; heavy and cumbersome reporting procedures; overly powerful faculties as well as ministries lacking experience with the expanded institutional autonomy (EUA 2009b: 39).
- With greater autonomy, forms of accountability are changing. These include new accountability requirements by the State (in some cases, giving more autonomy with one hand, and curtailing it with another). The responses of the national rectors' conferences show that both external and internal quality developments have been one of the major developments of the last decade. The European Standards and Guidelines for Quality Assurance (ENQA 2005) and the annual European QA Forum (instituted in 2006) have provided the needed boost to benchmark internal and external quality processes across the continent.
- Institutions are developing internal mechanisms of quality monitoring. This is particularly true for those that have international aspirations, which can be achieved more easily if they are in a position to demonstrate their quality to their potential partners. Thus, the institutional responses to the *Trends 2010* questionnaire show a strong correlation between the institutions with international aspirations and those that consider quality processes

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to be essential (cf. Section II.7.2). However, the growing interest of policy makers and institutional leaders in rankings may result in a focus on what is measurable rather than what is important for quality.

- Expanding the institutional portfolio of activities leads to the creation of new administrative functions and a more professional management, thus to the need for more professionally trained staff, more attention to administrative staff expertise at all levels and more sophisticated management tools (Salmi 2007). The growth in the number and professionalism of administrative staff means that functions that were filled temporarily by academic staff are on the decline and that the process of professionalising institutional management is under way. It should be noted, however, that in almost half of the 34 countries included in the recent EUA autonomy study, all or most of the staff had civil servant status. Thus, some countries “have very little freedom in their staffing autonomy as they have no possibility to determine the number of staff they recruit and hence have no control over the overall salary costs. Even individual salary levels are determined by national authorities” (EUA 2009b: 41).
- Different roles are expected of academic staff. The concept of academic freedom is changing – some will say that it is even eroding – because academics are pressured to be successful in seeking funding for their research teams, which requires adapting their research to match the research strategies and priorities of their institutions and the funding agencies (Mohrman *et al* 2008). In addition, there is greater stress in ensuring research integrity as the number of public/private research partnerships grow and require institutions to set a range of processes in motion in order to ensure research integrity (EIRMA *et al.* 2005). With the widening range of expected roles and tasks, there is increased pressure on academic staff differentiation in some countries (Reichert 2009) but only 29% of

HEIs responding to the *Trends 2010* survey identified “new academic career policies” as one of the major changes in the last decade.

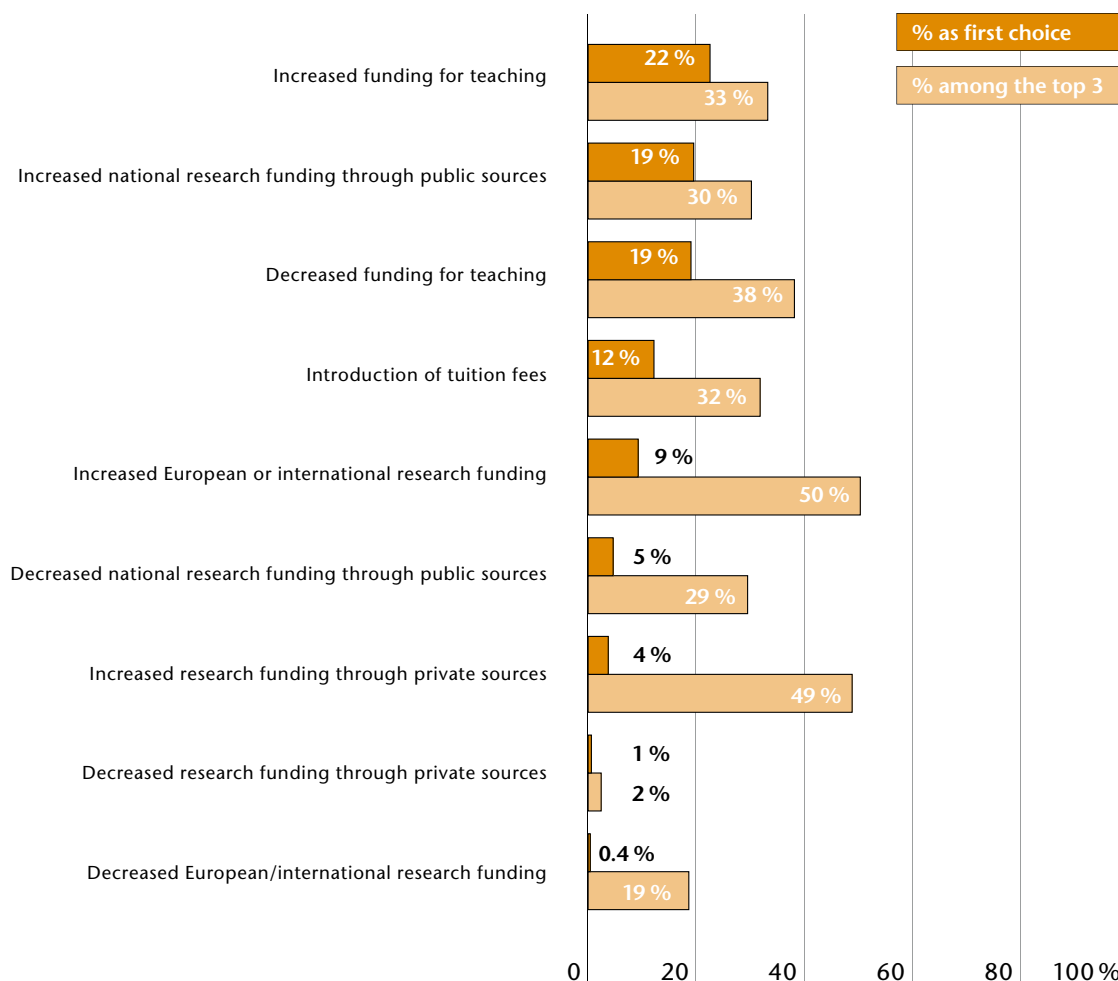
- With the enhanced role and function of top management teams, the traditional scope of collegial decision-making may be narrowing because of the decrease in the number of participants in these bodies (e.g., Musselin 2008). This is also affecting students. While the majority of institutions (91%) responding to the *Trends 2010* questionnaire report that the tradition of student engagement in institutional decision-making bodies continues (and is increasing in such areas as quality assurance), given the trend to institutional mergers, increased responsibilities of university leaders and more streamlined institutional management (shrinking or eliminating collegial bodies) further analysis is needed of the changing roles of students in key decision-making processes.

Funding

As public authorities are no longer covering the full cost of research and education, institutions are compelled to find other sources of funding that may provide them with greater flexibility in making strategic choices. These include international research grants, industry contracts, and, in some cases, tuition fee increases as the following table shows.

In turn, diversifying funding requires building financial management capacity, an area identified by European institutional leaders as one with the highest capacity-building needs (EUA 2008a). The need for sustainable funding and full costing reflects the increased importance of strategic decisions and requires precise information for each cost centre in order to prioritise activities and to allocate funding more accurately.

Table 3. Q9. In the past five years what have been the three most important developments in the funding of your institution?



The current financial and economic crisis has had a negative effect on many European countries. An EUA consultation of national rectors' conferences in November 2009 revealed the following:

- The most severe impact is presently being felt in Latvia where national GDP has fallen by 18% in 2009, which has meant major cuts in public funding, including for higher education: nearly 50% in 2009, with further reductions planned for 2010. This has already led to salary cuts and reductions in staff in all of Latvia's 34 higher education institutions. Private funding is also expected to drop by 15%, and private institutions have been recruiting about 45% fewer students than in previous years (compared to about 18% less for public universities). Irish universities faced reductions of 6% in 2009 and expect a further 10% cut for 2010. The UK sector expects cuts in teaching funds of between 10 and 20%, which is likely to have a strong

impact on the sustainability of the smaller institutions. University leaders calculate that over 6,000 posts are currently at risk. But even in countries where institutions still benefit from or had no reductions in public funding (e.g., Sweden), there is a fear that the situation will change in the future.

- A large number of European countries reported a growing student demand either to enter higher education or to stay on for additional qualifications. This, in combination with mounting pressure on public funding, has led to debate on the issue of tuition fees and free admission to higher education in some countries. In England, the level of tuition fees is being reviewed. In Austria and Germany, the recent debate and student protests (autumn 2009) were also about funding and the possibility to regulate student access in areas where student demand is higher than the available capacities.

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- Although research income from private sources was, in the majority of cases, reported to be stable, it was equally clear that new partnerships and projects were proving to be more difficult to establish.

Nevertheless, the European Commission continues to put great emphasis on higher education and research as long-term investments for the future as demonstrated by the discussion document on “The future ‘EU 2020’ Strategy” (EC 2009a). In addition, a number of national rectors’ conferences report that governments have reemphasised the central role of higher education in order to jumpstart the economy and respond to growing unemployment.

In a summary of the literature on the changing role of higher education in society and the concomitant changing role of the State, Brennan *et al* (2008: 24) note that these changes may call into question the future capacity of higher education to contribute

to the public interest and question whether the sum of institutional activities, driven by institutional self-interest, equates to the public interest.

While this might be a concern in a few higher education systems where the State has retreated in favour of market forces and despite the sometimes considerable impact of the present economic crisis on higher education budgets, higher education systems in the majority of European countries are well-rooted in public values and supported by society as a public service. Thus, at the last ministerial meeting, ministers pledged their “full commitment to the goals of the European Higher Education Area, which is an area where higher education is a public responsibility” (Leuven/Louvain-la-Neuve Communiqué 2009: §4). This is an important commitment in order to maintain and preserve the historical characteristic of European higher education.

1.3 The Bologna Process in the changing European political landscape

The general policy changes and reforms that are described above have been as central to current developments in Europe as has been the Bologna Process and are often inseparable from it. Initially, the Bologna Process focused on improving the quality of teaching and learning, but it is impossible to restructure and change education without affecting other aspects such as research or quality assurance at large. In addition, the idea of the European Higher Education Area (EHEA) was soon followed by the notion of the European Research Area (ERA) which is now enshrined in the Lisbon Treaty. Furthermore, following the Hampton Court Summit in 2005 under the UK Presidency that focused on the role of universities in underpinning

Europe’s development, the European Commission launched the Modernisation Agenda for Universities that brought the higher education institutions increasingly to the centre of policy change in relation to both the EHEA and the ERA and combined quality development of teaching, research, service and institutional management in a common reform agenda.

Thus, the Bologna Process has increasingly been embedded in the larger European policy agenda and driven change at the national level. The majority of national governments and institutional leaders, however, continue to view the national or regional context as the filter through which the Bologna Process

needs to be implemented. This means that sometimes the Bologna Process is seized upon at national level as an opportunity to bring about changes that are not necessarily agreed at European level (or are not part of the European agenda) but which are seen as important locally. Indeed, the Bologna Process has been a “dislodging event” (Zemsky 2007) for national authorities and institutional leaders who have seen the opportunity to bring in its train other needed changes.

Interestingly, when the national rectors’ conferences were asked whether the Bologna Process is presented as a national or European policy change process in their countries, only a slight majority stated that it is presented as a European one; many stated that it is presented as a national one while, for a handful, the picture is mixed (i.e., for those, Bologna is both a national and European process).

Where other national policy changes had already been at work, the Bologna Process has added yet another layer to a sometimes heavy change agenda. These changes, including those inscribed in Bologna, are deep and significant, often even requiring changes in attitudes and values. They are time and resource consuming, especially on staff members who may or may not see their benefits.

Unsurprisingly, the impact of the major trends that were described in the previous sections is not in evidence with the same strength or pace across Europe, thus leading to diversity of national responses and developments. Additional factors contributing to the diversity of approaches to change have to do with the following historical or political aspects:

- Seventeen countries have joined the Process between 2001 and 2005, thus leading to different paces in national or institutional implementation: some countries and some

institutions are ahead; others are behind because they signed on late to the Process (or were delayed for other reasons). Thus, only four national rectors’ conferences report that the Bologna Process was fully implemented in their countries; nine are implementing most action lines while twelve respondents report that Bologna reforms are being implemented comprehensively.

- The understanding of and the responses to the Bologna Process “differ considerably, depending upon context, traditions, geography and history” (Wilson 2009: 3). Wilson identifies four broad geographical areas in Europe with different rationales for the Bologna Process: the UK where Bologna is sometimes seen as a means to raise standards through internationalisation; the original EU 15 (Western Europe) where the Bologna Process has challenged institutions to rethink radically the structure and quality of their programmes and to consider Bologna as the start of a change process rather than an end in itself; the new EU member states where the Bologna Process is part of a multifaceted social transformation following the fall of the Berlin Wall; and the group of non-EU members countries that have joined Bologna late and are in the process of catching up.
- Much has happened in the European political arena in the past decade, especially the enlargement of the European Union to 27 member states. Today more than half of the 46 Bologna signatories are now members of the Union and their ministers or representatives are part of both the Bologna and the Lisbon discussions. This new situation provides a potential for greater awareness to address policy issues in a joint and coordinated way, thus bringing more coherence between EU policy developments and the Bologna Process.

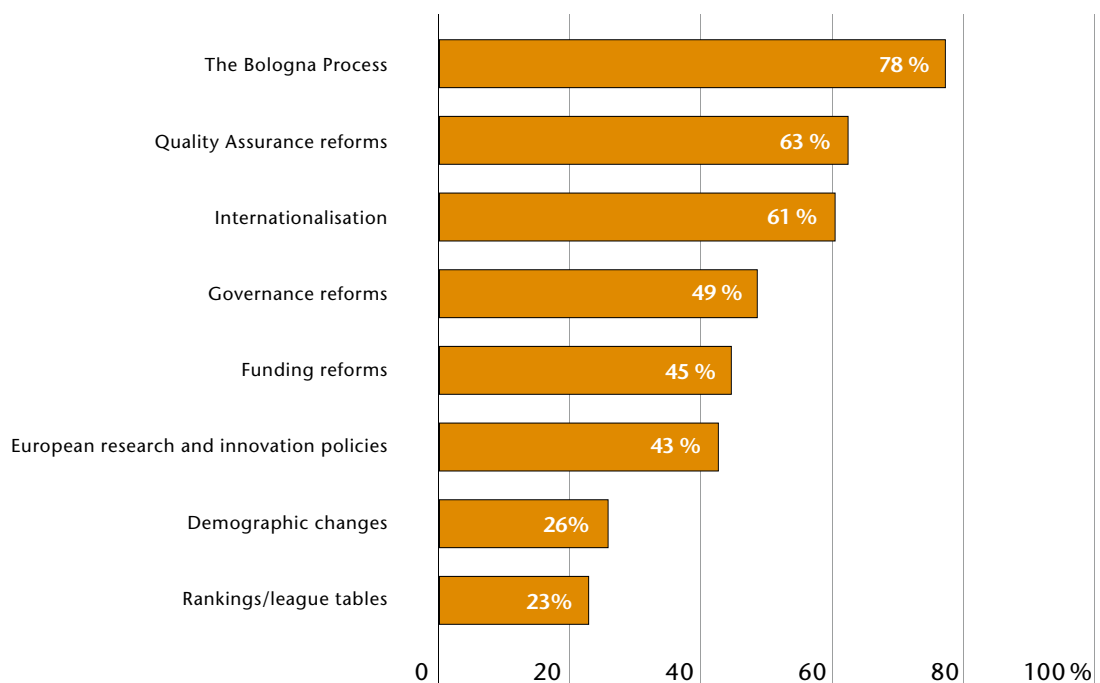
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A decade of change in European Higher Education – context setting

1.4 Future challenges

As will be seen in Part II, progress with the Bologna-driven changes has been considerable and very important to institutions as the following table illustrates:

Table 4. Q7a. Over the past three years, how important have the following developments been for your institutional strategy (high importance)?



What could be the guiding vision for Bologna in the next decade? While this topic will be further developed in Part III, it is worth noting already the difficulties of dealing with such a profound change agenda as the Bologna Process in isolation from other major international and national developments. Moreover, the goal posts have been and will be constantly moving resulting in continuous redefinition of reform scope and emphases. Perhaps more decisively, in order to be meaningful, such change requires a cultural transformation, which cannot occur overnight, by national decree or institutional strategy.

Thus, from a pragmatic point of view, the future focus of the Bologna Process should be squarely on more in-depth implementation and qualitative consolidation by institutions. In this context, it is important to keep in mind the very successful decision-making model of the Bologna Process, which has engaged governments and stakeholders in a sustained dialogue and close partnership. Therefore, it is crucial that the next stage of the Bologna Process continue to interest governments and engage institutions.

In this context, there are three aspects that will be important for the next decade:

First, with the greater overlap between EU member states and Bologna signatories, the two processes – Bologna and the Lisbon Strategy – could become more closely intermeshed through the use of the Lisbon methodology, with its reliance on developing indicators and statistics, rankings, ‘naming and shaming’ as a means of benchmarking member states performance. This would have mixed effects on higher education institutions and students, potentially weakening the focus on partnerships in the Bologna Process, on quality development and improvement and diluting the central philosophy underpinning Bologna.

Second, attention needs to be paid to the growing link between the ERA and the EHEA. While this is crucial to HEIs, given their interdependent teaching and research missions, careful consideration must be paid to the possible unintended consequences for the continued momentum of the Bologna reforms of the multiplication of international ranking schemes based on research performance, and the growing trend towards concentrating research funding in a minority of institutions.

Finally, all Bologna Process partners should be aware of the risk of slipping into a technical and technocratic discourse at the policy level, among a relatively limited number of actors, with the attendant possibility that its vocabulary could become opaque to many academics. This would be regretful because the overriding objectives of shifting to student-centred learning and restructuring meaningfully curricula require time and resources as well as an adequate understanding, by academic staff and students, of the Bologna tools, their context and linkages.

Is the Bologna Process at risk of losing its momentum and identity in this new environment? Part III will come back to this question, following Part II, which shows that most of the tools and structures are in place while more work is required if the most profound objectives are to create new institutional cultures and improve quality and flexibility of teaching and learning.

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The Sorbonne Declaration, signed in 1998, provided the inspiration for the Bologna Process. This Declaration opened by stating the need to create a 'Europe of knowledge' in addition to the Europe of the Euro and the economy. Its approach to higher education is humanistic rather than instrumentalist as shown in the way it framed the overarching objective:

*The anniversary of the University of Paris, today here in the Sorbonne, offers us a solemn opportunity to engage in the endeavour to create a European area of higher education, where national identities and common interests can interact and strengthen each other for the **benefit of Europe, of its students, and more generally of its citizens** [emphasis added] (Sorbonne Declaration 1998: 3).*

The Sorbonne Declaration defined the characteristics of the European Higher Education Area (EHEA) as a space of both national diversity and European unity, and as an area of knowledge exchange through the mobility of students and academics, and greater academic cooperation. It envisaged offering students a greater diversity of degrees within a readable framework, through the use of credits and semesters, and establishing an undergraduate and graduate cycle in order to create the conditions that would achieve the overall vision: flexibility and enhanced access to knowledge, in a lifelong learning perspective. It was this vision that was further elaborated by the 29 Ministers who signed the Bologna Declaration and that has been implemented over the last decade.

Thus the Sorbonne Declaration, signed by four countries, set the stage for policy developments in the next decade. A year later, in 1999, the Bologna Declaration was signed by 29 countries, soon to be joined by more countries for a total 46 (including some federal States with several HE systems). For the past ten years, the Bologna Process

has mobilised the energies of students, staff members, institutional leaders and policy makers. As the process took shape many 'action lines' were added in order to achieve the following objectives: easily readable and comparable degrees, mobility, employability, quality, improved synergies between the EHEA and the ERA through the Doctoral level, in a perspective that stresses social cohesion through access to higher education and lifelong learning.

An important success factor has been the open and consultative ways in which decisions have been made at European level through a process of inter-governmental consultation that included European HEIs, students and other stakeholders as important players. Wide consultation has made it possible to maintain national and institutional diversity while developing a common language in order to understand rather than level out cultural differences. Thus, one essential guiding principle of the Bologna Process has been to emphasise the diversity of approaches and the rich cultural traditions in Europe.

European HEIs have engaged in the creation of the EHEA and in implementing the Bologna Process while taking into account their own national and institutional contexts. After ten years, the different action lines and the objectives of the Bologna Process have permeated most national systems and institutions but not necessarily in the same way. Reforms have been introduced with a national and institutional flavour as is shown below. This openness of the Process has resulted in multiple interpretations of the Bologna actions lines and their importance relative to one another although, in some cases, some action lines became confused with the objectives (leading, for instance, to confusion between quality and quality assurance) or have been used as a proxy for the objectives.

The rich source of the *Trends 2010* site-visit reports underline just how important it has been to create an institutional culture of change. This change has been especially

successful when institutional leaders have guided the implementation of very complex changes and communicated clearly how the combination of national and European policies can work to the benefit of their institutions, their staff and their students.

The following sections assess how the Bologna Process has contributed to the overall “benefits of Europe, of its students, and more generally of its citizens”, as stated by the Sorbonne Declaration, through an examination of:

- HEIs’ perceptions of the EHEA (Section 2.1)
- The changes to the degree structures and their acceptance (Section 2.2)
- The implementation of the set of Bologna tools of direct relevance to institutions (Section 2.3) and the development of

European frameworks at the system level (Section 2.4)

- Progress with the lifelong learning and widening participation agenda (Section 2.5)
- Trends in internationalisation and mobility (Section 2.6)
- Two key conditions for institutional success with Bologna implementation: student services and internal quality processes (Section 2.7)

Each of these sections ends with an identification of future challenges from both an institutional and policy perspective. Section 8 concludes Part II with a small set of overarching recommendations addressed to all Bologna actors.

2.1 The European Higher Education Area today

2.1.1 Commitment to the EHEA

After ten turbulent years, are higher education institutions still committed to the creation of the EHEA? This question is particularly important given the significant contextual changes that were outlined in Part I, such as the deep-reaching national policy changes and the growing internationalisation that has shifted the scale and focus of many institutional activities. The *Trends 2010* questionnaire raised several questions in an attempt to ascertain the institutions’ views.

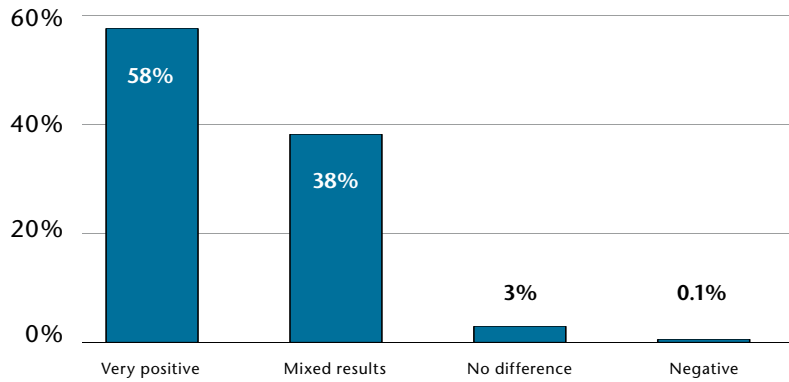
First, institutions were asked how they view the realisation of the EHEA: 58% gave it the highest positive rating; 38% felt that the EHEA so far has had a mixed result; and only 0.1% thought that it had a negative impact.

Interestingly it is the countries that initiated the Bologna Process by signing the Sorbonne Declaration – France, Germany, Italy and the United Kingdom – that perceive it as having had mixed results. This confirms an analysis of the *Trends 2010* data that revealed that implementation was quicker in smaller countries.

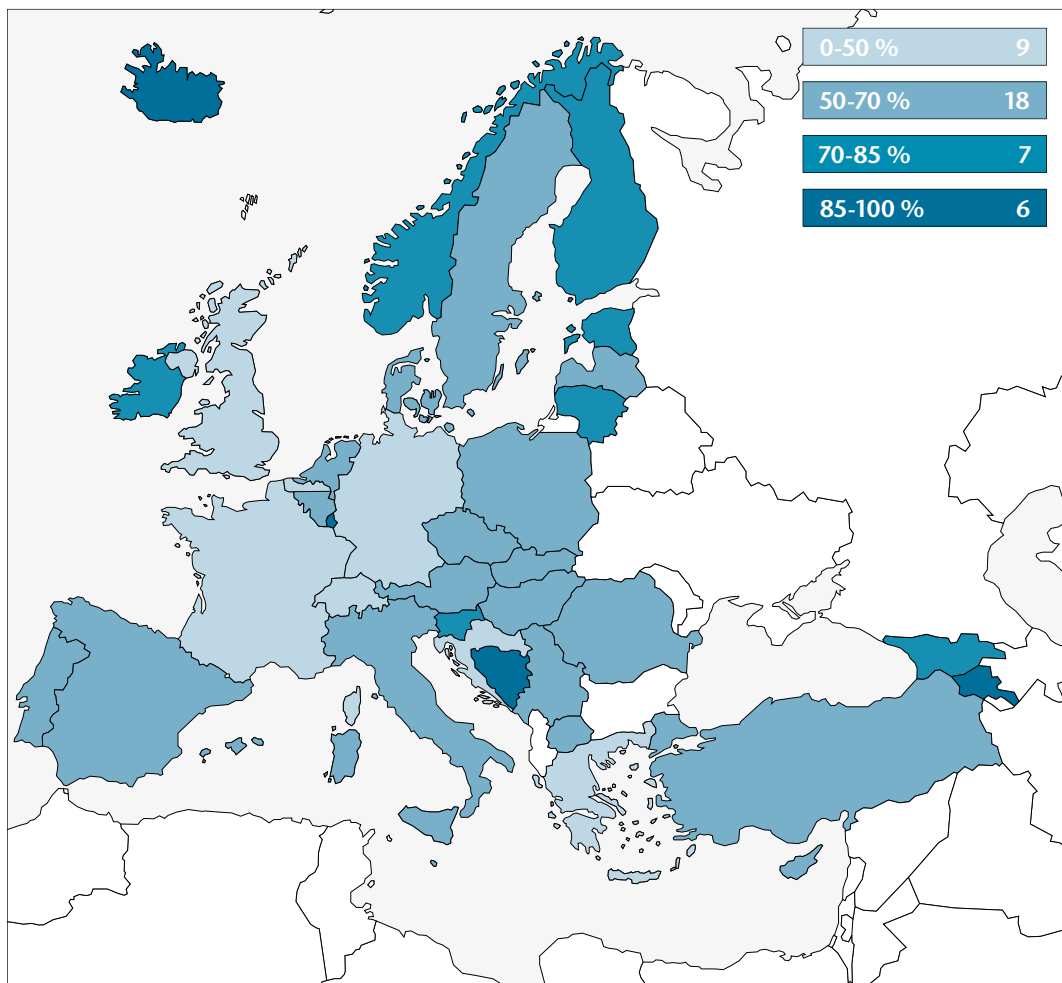
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Table 5. Q6. In my institution, the realisation of the European Higher Education Area (EHEA) has been



Map 1 — Trends 2010 (2010). Q6. In my institution, the realisation of the European Higher Education Area (EHEA) has generally been very positive



Second, findings regarding the institutions' expectations of the EHEA and the opportunities it will provide have been comparable to the *Trends V* results three years ago, with a slight increase in the number of institutions answering that the EHEA will benefit both institutions and students in *Trends 2010*.

It is clear from the answers to these questions that the EHEA remains as important as it was three years ago and that the perception of its overall value has increased slightly, even if concerns about the growing competition in the sector can be detected: 44% of respondents think that it will benefit the most competitive institutions and 24% the more prestigious ones. It is too early to conclude much more about the expectations for the EHEA, but it is significant for its realisation that institutions see the EHEA as being equally important for students and institutions.

While it is evident that institutions are committed to the EHEA, the *Trends 2010* questionnaire did not try to ascertain how they understand its meaning and – curiously – there is very little that has been written to describe what the EHEA will be or should be about. The lack of discussion has probably led to some confusion between the broad, humanistic objectives and the technocratic aspects of some Bologna action lines.

A notable exception from a European perspective is an article by Sjur Bergan who argues that it is possible to discern four major purposes of education: “preparation for the labour market, preparation for life as active citizens in democratic societies, personal development and the development and maintenance of a broad, advanced knowledge base”. Bergan rightly points out that although these four purposes should be seen “as part of a whole, and they do – or at least should – reinforce and complement each other” (Bergan 2006: 3-4), personal development has been ignored in the Bologna discussions and the other three purposes have been mentioned – in isolation – in three different Bologna communiqués (Bergan 2006: 13).

Given that most of the difficulties in implementing the Bologna tools are now behind many institutions, it may be opportune to have a broad debate on the kind of citizens Europe needs in the 21st century. The recent emphasis on student-centred learning in the Bologna Process constitutes perhaps the first step in this discussion. The introduction of student-centred learning (along with other

instruments) can facilitate some of the aims of promoting mobility, internationalisation and the competitiveness of the EHEA, creating institutional quality cultures and enhancing widening participation and lifelong learning. The work toward the realisation of the EHEA has also raised awareness of the different types of learners in European higher education and the fact that a student portfolio of full- and part-time students, international students and lifelong learners, constitutes a competitive advantage as well as a worthy societal goal.

The term ‘student-centred learning’ is very much in evidence in contemporary writing and thinking on education and has the potential of providing coherence to the Bologna Process. While there is a reasonable consensus that a move to a more student-centred approach to higher education is desirable and should be an important aspect of the European Higher Education Area, like much of the Bologna lexicon, it is a term that is open to different interpretations by different actors and interests within the Bologna Process.

In this report, student-centred learning is used in its widest sense, and its meaning is extended by implication to cover a variety of related developments. Beyond the diversity of descriptions and definitions of student-centred learning, the following common characteristics are in evidence and can help to explain the changes that have taken place in a number of European HEIs and that have been driven by the Bologna Process and the wider trends identified in Part I:

- There is a shift in focus from the teacher and what is taught, to the learner and what is learned.
- A student-centred approach to learning involves a different relationship between teacher and learner, whereby the teacher becomes a facilitator, and where the responsibility for learning is shared, and the learning is ‘negotiated’.
- The process approaches learners as individuals – taking account of their particular backgrounds, experiences, perceptual frameworks, learning style and needs.
- The learners ‘construct’ their own meaning by pro-active learning, discovery and reflection. The teacher builds critical thinking as part of the learning process.
- There is often a stress on interdisciplinarity, with the goal of attaining higher level, generic skills and knowledge.

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- The learner is involved in determining what is learned.
- Student-centred learning is focused on outcomes, rather than inputs.
- The learning process is not just or primarily about transfer and restitution of knowledge, but about deeper understanding and critical thinking (e.g. an understanding of the parameters and the provisional nature of knowledge).
- Assessment is generally formative, and feedback continuous.
- A student-centred approach makes it flexible and easier to develop blended teaching models and to recognise prior learning, thus benefiting both traditional and non-traditional learners and providing the flexibility to learn throughout life.

While student-centred learning represents a significant shift in focus, it is not absolute. Student-centred and teacher-centred approaches are not necessarily mutually exclusive approaches – most learning takes place somewhere along this continuum. It is important to emphasise that the shift towards a student-centred approach does not negate or diminish the role of the teacher. It does, however, change the role of both teacher and learner. The implication for learners is that they are not defined as recipients of a service or customers but rather as active participants with shared responsibility for outcomes. Finally, it is important to note that a student-centred approach is resource intensive and is difficult to apply in resource-starved contexts because they often entail small group work and lower staff-student ratios.

As with any approach to learning and teaching, it can be done well or badly and it is enormously helped if it is supported by student services and staff development schemes. Indeed, a central ‘discovery’ of many institutions during the early implementation of Bologna was the importance of developing a coherent institutional offer of student services if the Bologna teaching and learning approach – modularisation, flexibility, and personalised learning paths – was to be achieved (cf. *Trends IV*). Thus student-centred

learning can support the development of new degrees and programmes and, where properly implemented, can address both the internationalisation agenda and the social agenda. It is within this context that the following discussion of Part II should be considered and understood.

The introduction of new degree structures, the ‘Bologna tools’ and action lines are closely linked with the shift towards a student-centred approach to higher education. A student-centred approach embraces flexibility and choice in progression routes and in approaches to learning and assessment, as well as the use of tools such as ECTS (for credit accumulation and transfer as well as recognition of prior learning) and support services for students, all in a European context embracing 46 countries and their higher education systems and in order to respond to the challenges of the 21st Century.

Thus, the tools and action lines are interlinked but this has not necessarily been clear to institutions because of the evolving nature of the policy agenda. As mentioned earlier, the Bologna Process has been characterised by the progressive introduction, over ten years, of a number of tools and ‘action lines’ that had been developed to make the EHEA a reality. In addition, the Bologna Process relied on some tools (e.g. ECTS and the Diploma Supplement) and objectives (e.g. mobility, quality and social agenda) that had been developed prior to the Bologna Declaration thus requiring some adjustments. The sections below examine how far the implementation has succeeded.

It is important, however, to keep in mind that instruments must be developed without obscuring the main goal of equipping all learners with the education and skills they need for their professional and personal development and their role as citizens. The paradigm shift to student-centred learning is probably the ultimate measure of the Bologna reforms but, so far, no study has been able to assess and measure this aspect of the Process, at least not at European level.

2.1.2 Future challenges

The Bologna Process is a means to an end: its main goal is to provide the educational component necessary for the construction of a Europe of knowledge within a broad humanistic vision and in the context of a massified higher education system; with lifelong access to learning that supports the professional and personal objectives of a diversity of learners. In this context, the challenges are: how to keep a loose decision-making and cooperation framework on track and deepen the dialogue with the stakeholders, develop a shared language, and focus on a shared understanding of the underlying objectives rather than the technicalities of the tools. This can be achieved if the tools are seen as being interconnected through student-centred learning and with the view of catering to a diverse student population, within specific institutional and national contexts. Greater communication efforts are needed and they should be centred on the benefits of the reforms to students, academics, employers and society at large.

From an institutional perspective:

Each institution should seek to respond, from of its own perspective (specific mission and educational goals), to the question of the kind of citizens European society needs in the 21st century. In this context, institutional leadership is essential to bring coherence to a set of issues that appear (but should not

be) disconnected and that can be linked to the development of student-centred learning. Crucially, the academic community needs to be engaged and supported in order to implement this paradigm shift and to be able to understand their role in a broader way. This requires consideration of adequate institutional communication strategies and staff development. Furthermore, an internal review by each institution of Bologna-driven changes would help focus on addressing gaps and weaknesses against the overall objectives that have been set.

From a policy perspective:

The Bologna Process should not be seen as a goal in itself but the means by which the EHEA will be established. While the institutions' commitment to EHEA remains positive overall, it is also clear that the tools and technical aspects of Bologna have been such a challenge that many actors have missed the core question of the kind of citizens European society needs in the 21st century. It would be important to promote debate on this crucial question at European and national levels and to allow institutional actors to focus on the implementation of these considerable changes. In other words, the role of national authorities, in partnership with HEIs, is to develop the appropriate framework and support measures that would facilitate and support a new paradigm for higher education and the changes that this entail.

2.2 Degree structures

2.2.1 Introduction

It is fitting to begin with the most fundamental changes, those that touch upon the structure and content of degrees. This section examines the extent to which, over the past ten years, the new degree structures have been used by institutions and are becoming embedded in institutional structures and practices, as well as their acceptance by the labour market. It begins with general considerations about the implementation and acceptance of the three-cycle structure and moves to a more detailed consideration of each cycle.

Implementation of the three-cycle structure

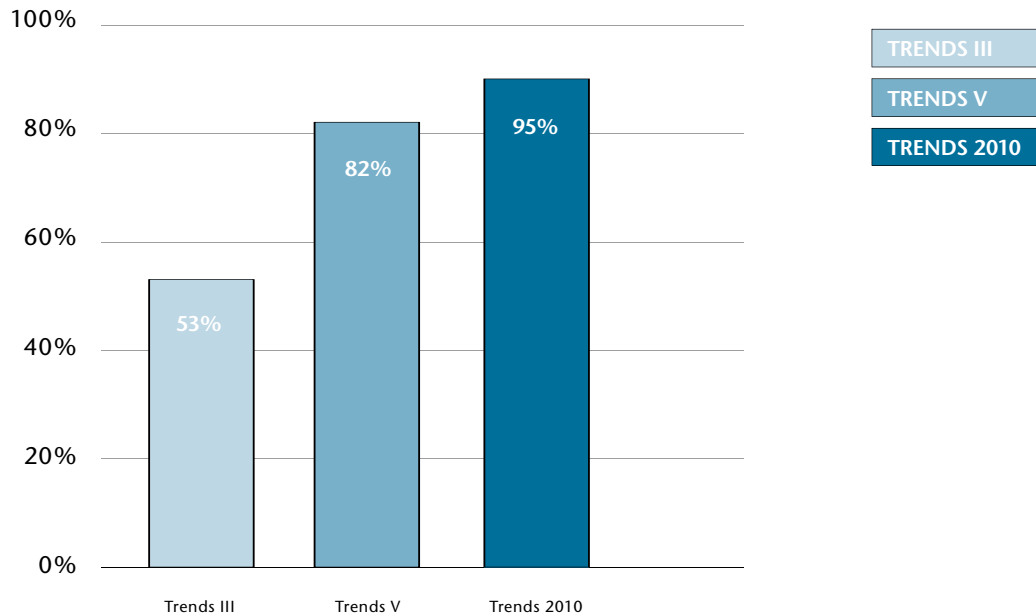
As confirmed by many other Bologna-related reports, the overwhelming majority of institutions now have in place the three-cycle degree structure in most academic fields. Compared to previous Trends surveys,

a small minority (3%) is still only planning to do so. When considering that 13 new countries have joined the Bologna Process since 2003 (i.e., at the time of the *Trends III* report (2003), which is the base line for the *Trends 2010* report), the significant increase in the number of institutions that have implemented the new structure has been a remarkable accomplishment: from 53% of institutions in 2003 to 95% in 2010.

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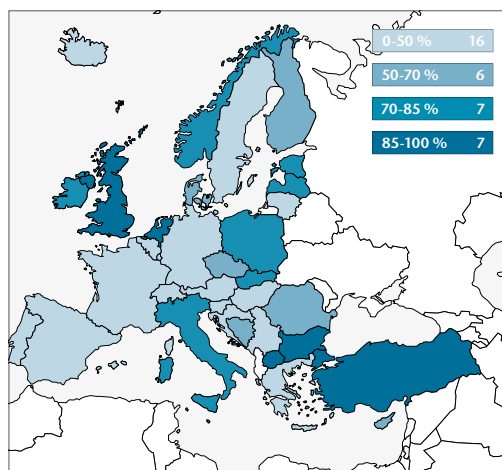
Table 6. Q12. Does your institution have a degree structure based on either two or three main cycles (Bachelor, Master, PhD) in most academic fields?



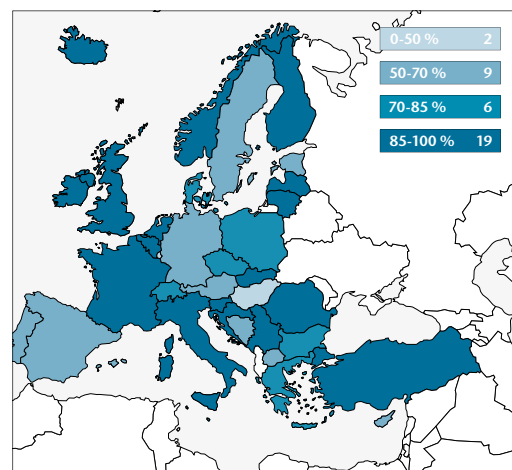
The following three maps show progression with the implementation of the degree structures based on *Trends III*, *Trends V* and *Trends 2010* data respectively. Whereas *Trends III* (2003) showed that only seven countries

had the three cycles in place, today, 37 do. Only three countries are still working on it and for the remaining ones *Trends 2010* has not been able to collect sufficient data.

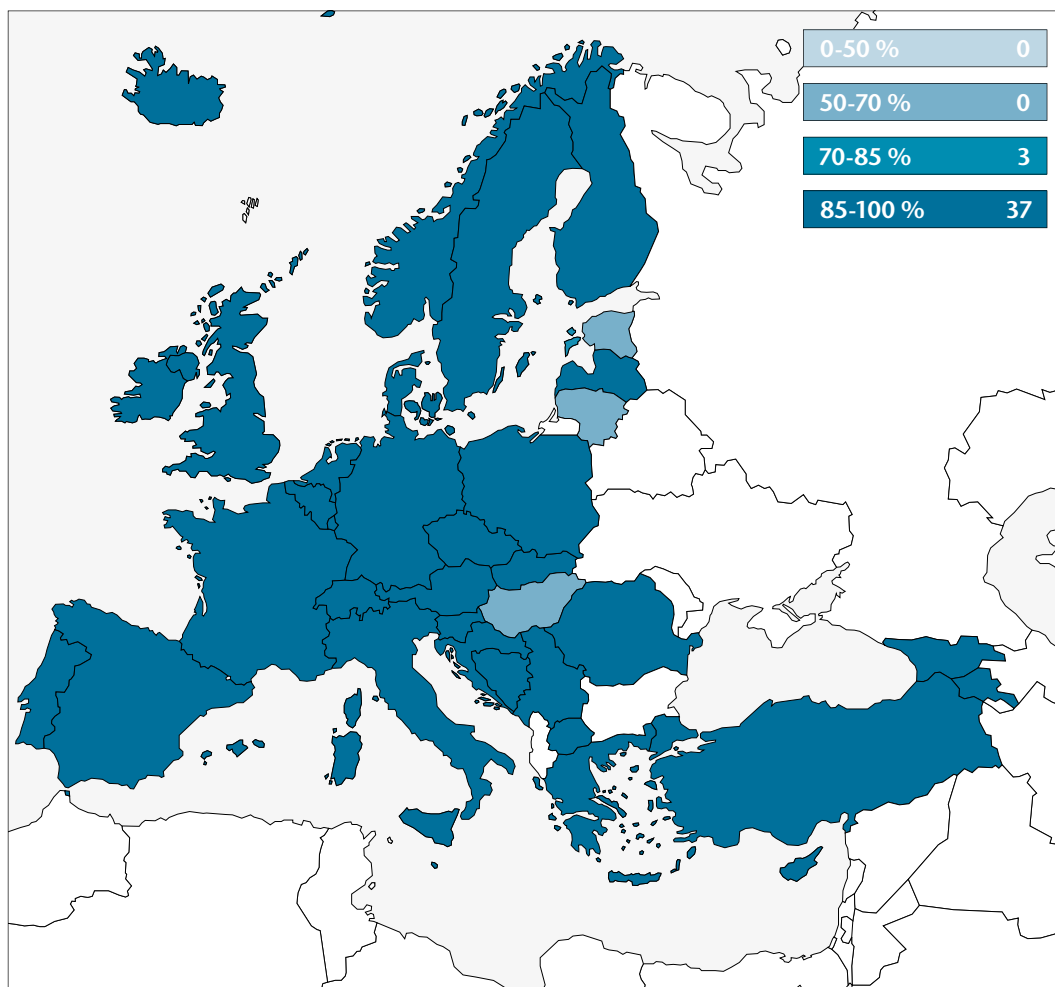
Map 2 — Implementation of Bologna cycles: Trends III (2003)



Map 3 — Implementation of Bologna cycles: Trends V (2007)



Map 4 — Implementation of Bologna cycles: Trends 2010 (2010)



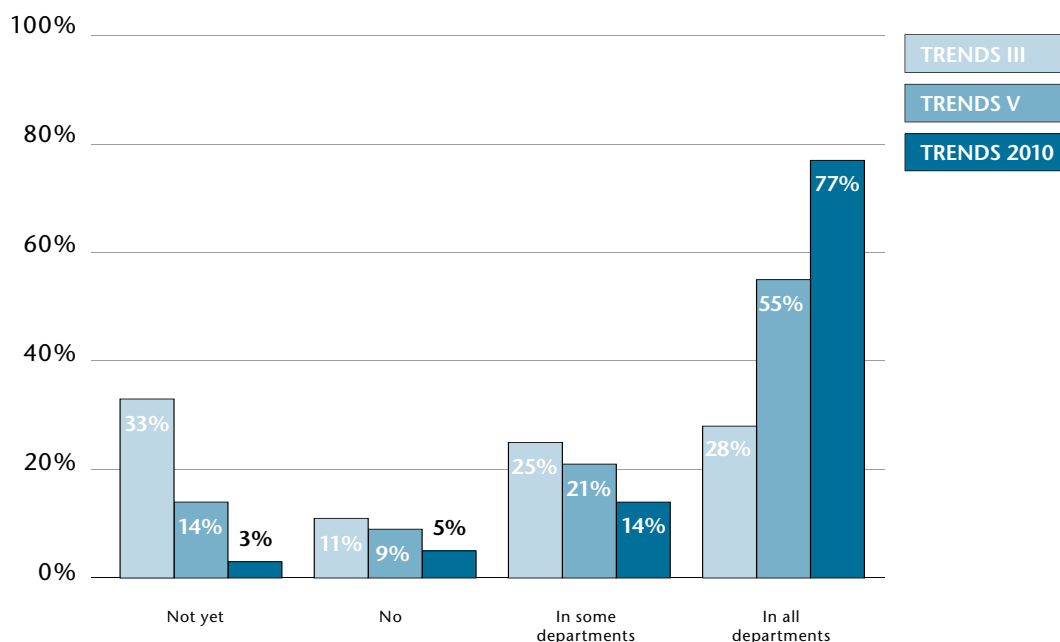
While *Trends 2010* data provide overwhelming evidence of the implementation of the three-cycle degree structures in Europe, the site-visit reports paint a more complex picture. In many countries, the Bologna structures are being implemented within a national context; some old degree structures are being kept because of pressures from different stakeholder groups, or are being phased out, but only gradually. Thus, at the moment there is a larger diversity of degrees and degree titles than before Bologna, in some cases because of the continued coexistence of old and new structures. What has been achieved, however, is consensus on the three-cycle degree structure and on a set of translation tools that enhances transparency.

In addition, it is clear from the responses to the *Trends 2010* institutional questionnaire that progress with respect to reviewing curricula has been remarkable. The proportion of institutions which have reconsidered the curricula in all departments has increased considerably: from 28% in *Trends III* and 55% in *Trends V* to 77% in *Trends 2010*. Taking into account those institutions that indicated that they have reformed curricula in some departments, the figure rises to 91% as compared to 76% in *Trends V*. This represents considerable progress, not least because the proportion of respondents who indicate that they have “not yet” reconsidered curricula has gone down to 3% in *Trends 2010* (from 14% in *Trends V*).

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Table 7. Q16. Has your institution re-considered curricula in connection with the Bologna Process, particularly with regard to adapting programmes to the new degrees structure?



The site visits show, however, that the interpretation of the changes needed to modify curricula in order to fit with the new degree structure varies enormously from country to country and from institution to institution, as does the introduction of student-centred learning as can be seen in Section 2.3 on building flexible curricula.

The implementation of the new degree structure in professional disciplines has been slower than in other subjects. Institutions were asked whether the Bachelor/Master structure applies to provision in a range of professional disciplines: architecture, dentistry, engineering, law, medicine, midwifery, nursing, pharmacy, teacher training, and veterinary studies. This is the first time that such a question was used in a *Trends* survey.

It is important to note that cross-border service delivery by most of these regulated

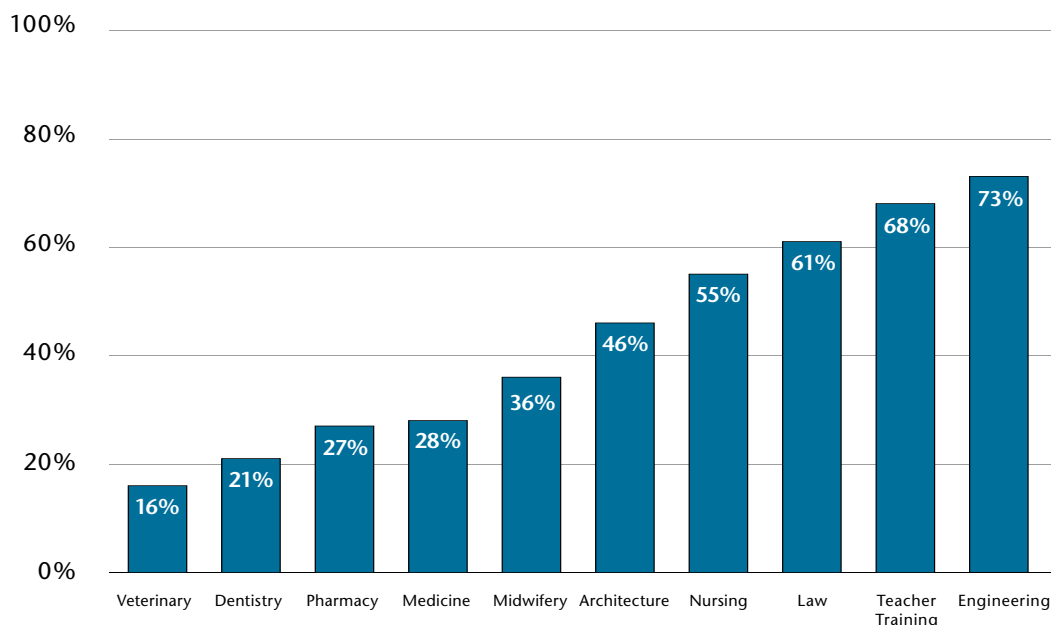
professions falls within the scope of Directive 2005/36/EC on the Recognition of Professional Qualifications. The exception is law, which has its own dedicated Directives. Teacher training and engineering are covered by the 'general system', according to which EU member states can map the qualification of incoming professionals against a grid of attainment levels, then requiring adaptation periods or aptitude tests as they see fit. The remainder are 'sectoral' professions, for which the Directive prescribes the minimum training conditions agreed by member states (Davies 2009).

In practice, the question of the relevance of the Bachelor/Master structure applies principally to the professions that traditionally have favoured long, integrated training programmes – namely, architecture, dentistry, engineering, medicine, pharmacy, and veterinary studies. It raises a number

of issues: the possibility of post-Bachelor entry into the labour market; the feasibility of inter-cycle mobility, both national and

transnational; and the identification of competences and learning outcomes at Bachelor and Master levels.

Table 8. Q14. If the following professional disciplines are taught at your institution, does the Bachelor/Master structure apply to them as well?



EUA asked professional bodies operating at European level for their reaction to the responses to the question shown in Table 8 above, as well as for their general comments.

Most professional bodies keep no record of the number of training institutions that have opted for the Bachelor/Master structure and are unable to hazard a guess. The exceptions are the Architects Council of Europe (ACE), which estimates that only one sixth of the 350 schools continue to offer the integrated programme, and the *Fédération Européenne d'Associations Nationales d'Ingénieurs* (FEANI), which regards the *Trends* responses as very misleading, suggesting instead that about 50% of schools retain the integrated model.

The responses to the *Trends 2010* institutional questionnaire indicated that a majority of the institutions offering degrees in the fields of Dentistry, Medicine, Pharmacy and Veterinary Medicine do not currently apply the Bachelor/Master structure, although in the case of the latter two disciplines, this only constitutes a narrow majority. The professional disciplines which are offered in the two-cycle structure in the majority of cases are: engineering, law, teacher training, and nursing.

The majority of relevant position papers on the new Bologna degree structures date from the 2004-05 period. The Standing Committee of European Doctors (CPME), the Council of European Dentists (CED), and the Pharmaceutical Group of the European Union (PGEU) energetically opposed the two-cycle structure. CPME and CED believe, on grounds of public safety, that there is no professional role for holders of the Bachelor qualification. Similarly, the Federation of Veterinarians of Europe (FVE) considers that there is no scope for Bachelors in its field. Nevertheless, FVE is not strongly opposed to the two-cycle structure; it accredits both Bologna and traditional integrated models. So, too, does the engineering accreditation project EUR-ACE, which is hosted by FEANI.

In architecture and pharmacy, Bachelor entry to the labour market is not possible in most member states. Only in engineering are there possibilities for entry to the labour market at Bachelor level. Even here, however, the picture varies from country to country: Germany is the only member state to have implemented the Bachelor/Master structure; France and Italy have retained the integrated degree; in other countries the situation is

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mixed. Partly this is due to the existence of three dominant – and quite different – traditions of engineering education: the British, the French and the German.

It is important to note that – whatever the strength of their opposition to the two-cycle degree structure – professional bodies are insistent that the agreed minimum training conditions specified in the Directive should not be eroded. ACE, for example, is happy with a 3+2 model, but is worried that the 4+1 model might prove vulnerable to cost-cutting.

Beyond the issue of the two-cycle structure, professional bodies welcome Bologna in every other respect. Their welcome has helped stimulate Bologna-oriented initiatives. In each profession, for example, an EU-funded thematic network is developing a competence-based curriculum within the Bachelor/Master frame.

The prospect of students moving from a Bachelor in one country to a Master in another has given new impetus to the issue of field-specific quality assurance and accreditation. While not all professions have such provision at European level, some of those that do are considering applying for membership of ENQA. Overall, the relation of the regulated professions to Bologna may evolve further in the period 2010-2012, during which the operation of Directive 2005/36/EC will be formally reviewed.

In conclusion, the proportion of institutions reporting having reviewed their curricula in professional disciplines in the context of Bologna has increased significantly, from an already high point. There are a number of examples of good practice at disciplinary or country level in relation to preparing graduates for the world of work or supporting institutions' efforts to improve dialogue with industry. There is compelling evidence that diversity within both second- and third-cycle provision is increasing, which provides an interesting contrast to the concerns of many institutions that national legislation is proving significantly more restrictive than the parameters of the European Higher

Education Area. First-cycle graduates going directly into second-cycle programmes remain very much the norm.

Significant challenges remain in relation to ensuring that curriculum review is undertaken by HEIs across Europe as part of their internal QA processes, and that employers are engaged in a constructive dialogue, particularly as regards the acceptance of first-cycle graduates into the labour market. There are critical issues to be resolved concerning some professional associations in this regard. At this stage, it is not possible to gain any helpful picture of the prospects of Bologna first-cycle graduates, as long as systems to track graduates of all cycles are not in place.

Acceptance of the new degree structures

Employability continues to be seen by all Bologna actors as an important goal of the Bologna Process and this is evident from the numerous references to employability in ministerial communiqués. The *Trends 2010* survey of national rectors' conferences also shows that the large majority regard employability as an important aspect of the implementation of the three-cycle system. However, the precise meaning of the term and the priority given to employability, or even to particular aspects of employability, vary depending upon the actors or the national and cultural contexts.

One of the key purposes of introducing the three-cycle system across Europe was to develop first cycle qualifications that will be accepted by the labour market but around 40% of site visits revealed significant concerns regarding the Bachelor degree in particular. The acceptance of the Master degree seems to receive the highest endorsement by students and employers alike. Several remarks are in order with respect to employment of graduates at the Bachelor and Master levels:

- There are countries in which the Bachelor has made no impact and where the Master remains the basic entry-to-labour-market qualification. While traditionally the graduate labour

market is predominantly national, expanding globalisation and internationalisation, joint degrees and full degrees outside the home country are creating a more global job market. This development is still at an initial phase but, based on the site visits, the trend toward more competition for students at graduate level is perceptible.

- In countries where the Bachelor is the basic qualification, the Master becomes a value added to the CV of those already in the labour market – the post-experience MBA is the best example.

It is important to highlight that ISCED (International Classification of Education) continues to aggregate Bachelors and Masters, which makes it impossible to analyse at system level such aspects as student-staff ratios or the employment patterns of Bachelor and Master students. Regardless of ISCED, however, these data collection and analyses should be a routine part of institutional activity and used in the further development of the two degrees.

The institutional *Trends 2010* questionnaire asked several questions in relation to employment – two of which sought to grasp the extent of employers' involvement in curricular development and the tracking of students' employment. These should be seen as proxy measures for some aspects of institutions' processes and policies to ensure graduates' employability.

The *Trends 2010* figures show a decline in the number of respondents who indicated close collaboration with employers: 24%, down from about 30% in *Trends III* and *V*. However, while this figure has declined, there has been a corresponding rise in the proportion of respondents who indicate that professional bodies and employers are occasionally involved.

These changes may be pointing to the fact that many institutions have finished redesigning their curricula for now and that the need to engage employers has become occasional, until such time as redesign is required. Furthermore, the site visit reports demonstrate that in half the countries visited, there is significant cooperation between HEIs, professional associations and employers, ranging from comprehensive and strategic in some cases, to more subject-dependent in others.

Tracking graduate employment is still not done systematically by all institutions (37%) or on a national level.

2.2.2 Bachelor level

The most challenging aspect of the three-cycle structure for the majority of institutions has been the introduction (or reform) of the first cycle, especially in countries where the first degree was very long. After examining the implementation process, this section considers the acceptance of the Bachelor as a first degree.

Implementation

As mentioned above, a very small number (3%) of institutions have not revisited their curricula to fit the new degree structures. There has been a concern, however, about the tendency for curricular redesign in some countries and in some institutions to amount to either simply reducing the duration of the programme or trying to compress the same amount of learning into a tighter timeframe. While the *Trends 2010* questionnaires did not specifically address the issues of workload and duration, evidence from the site visits suggests that the practice of compressing four or even five years of learning into a three- or four-year programme is not an isolated phenomenon. It was explicitly raised by students during some of the discussions held with the Trends researchers during the site visits. This concern echoes those raised in *Trends IV*, which reports: "The primary worries are that curricula are becoming more rigid and compressed with less space for creativity and innovation, and in this respect there were frequent complaints that too many units of former longer degrees are being crammed into first-cycle programmes." (*Trends IV*: 13).

There is also concern in some countries, such as Austria, Germany and Portugal, which have reduced the duration of their Bachelor degrees to three years, that this is making it difficult to include periods of mobility or internships, and to achieve student engagement. This concern is also reflected more widely in other Bologna-related reports and is probably linked partly to constraining legislative frameworks and partly to the fact that curricula may have been extensively revised but not always with a focus upon introducing more flexibility.

Acceptance of the Bachelor

As mentioned earlier, one of the key purposes of introducing the three-cycle system across Europe was to develop first-cycle qualifications that would be accepted by the labour market. A first condition for such acceptance, however, is that academics, students and institutions understand its value and are able to communicate it

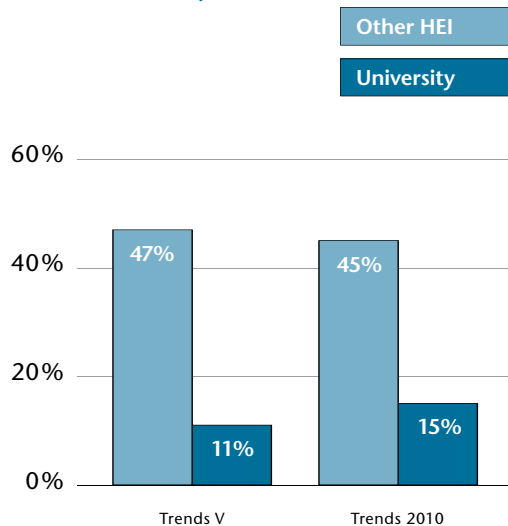
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to prospective employers. Comparison between the *Trends V* and *Trends 2010* data shows a small improvement in the number of universities that consider the Bachelor as proper preparation for employment (from 11% in *Trends V* to 15% in *Trends 2010*), while a significantly larger number of other types

of HEIs express greater acceptance, albeit with a drop from 47% in *Trends V* to 45% in *Trends 2010*. This slight decrease, which is within the margin of error, may reflect the fact that an increasing number is now allowed to offer Master level provision.

Table 9. Q32. What do you expect your students to do after the first cycle (Bachelor) degree (most will enter the labour market)?



implement change while others suggest that if higher education institutions, as the key actors of the change, are not convinced of the value of the first degree, how can they expect to convince employers? In addition, there are still national authorities that have not reviewed their employment policies and practices, with a view to ensuring entry points within the public sector for first-cycle graduates.

In a few countries, only a minority of first-cycle graduates continue directly into the second cycle although this does not necessarily mean that the Bachelor is accepted by the labour market. For example, in Hungary, national regulations mean that only 35% of first-cycle graduates can continue to the second cycle, yet students holding Bachelor degrees express concerns for their future and the possibility of finding relevant jobs.

Thus, there are open questions for the universities (as opposed to other types of HEIs) about the acceptance of the first-cycle graduates in the labour market that requires careful monitoring.

Nevertheless, the site visits also provided evidence of a variety of approaches used by institutions to increase acceptance of the Bachelor by the labour market and to support students in their career developments

Several site visit reports suggest that institutions, academics and students in some countries are far from convinced of the value of the Bologna first cycle and of its acceptance by employers. In many cases, the concerns are expressed in an almost pre-emptive way: employers are not expected to accept the Bachelor. Some of the site visit reports also report that conservatism on the part of some of the professional associations is hampering institutions as they try to

Some examples are:

- Paying particular attention to generic skills at the Bachelor level as academics identify learning outcomes in the context of a specific programme and in a particular institutional context
- Creating an environment that enhances entrepreneurship
- Charging the alumni association to provide valuable information about employment patterns, which feeds into the reworking of the curriculum

- Involving employers and external experts in the review and redesign of curricula
- Providing career development services and advice to students
- Tracking graduate employment

Tracking of graduates is essential to measure success in the implementation of what, in some countries, amounts to a very radical change to the structures. Without tracking, it is very difficult to grasp the usefulness of the Bachelor. Unfortunately, tracking the employment of graduates has not improved in the past three years and very few institutions have been able to follow the employment of their first graduates. Thus *Trends 2010* has only been able to gather information based on expectations (cf. Table 9 above), mainly because in a large number of countries Bachelor graduates have only recently come on the job market. The figures are almost the same as in *Trends V*, with 37% of institutions tracking all recent graduates and confirm the *Trends V* finding that the institutions that expect most of their first-cycle graduates to enter the labour market are more likely also to have a tracking system in place.

2.2.3 Master level

For many countries, the creation of a Master degree has constituted a significant innovation as part of the Bologna Process and it is clear that the perception of the Master as a separate degree from the Bachelor has taken hold. While much progress has been achieved, more change is expected in the near future.

Implementation

A recent EUA survey notes that while the Master is relatively well-defined in terms of its duration and credit points and that its level of academic attainment is expressed by agreed level descriptors, “its profile remains clouded by titles and nomenclature which, although usually clear at national level, lose clarity when viewed across external borders” (EUA 2009a: 7). Thus, the survey identifies several types of Masters and notes the challenges of having a proliferation of designation:

- *Academic Master: used in binary systems to distinguish the university-based programmes from the Professional Master awarded by non-university HEIs*
- *Consecutive or Continuation Master: a Master undertaken immediately following, or very soon, after a Bachelor qualification in the same discipline*
- *Conversion Master: a Master undertaken in a discipline other than that studied in the preceding Bachelor*
- *Joint Master: a Master delivered by two or more HEIs awarding a single of multiple diplomas*
- *Lifelong Master: used in some systems to designate second cycle provision delivered quite separately from the Consecutive Master*
- *Professional Master: used in binary systems to distinguish the Master awarded by non-university HEIs from the university-based Master (EUA 2009a: 12-13)*

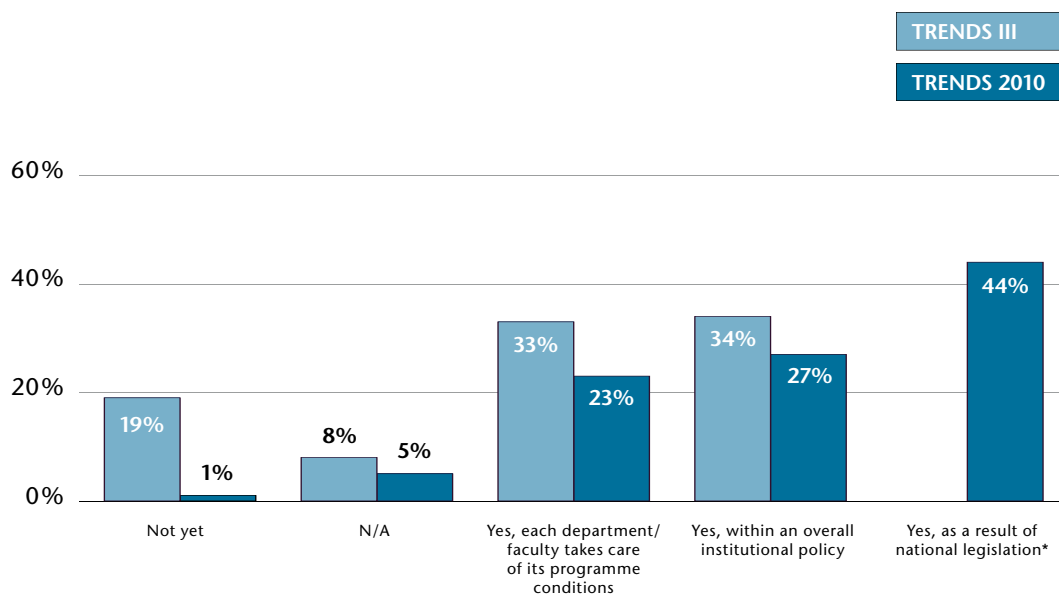
The last two – the Lifelong Master and the Professional Master – are more readily perceived as elements of lifelong learning. The salient feature of these Masters, in some countries, is their location in separately funded and separately administered academic departments.

Furthermore, a very large majority of institutions in Europe have recently defined entry requirements to the Master level, as a result of either national legislation (44%) or institutional policy (27%). Only 1% (down from 19% in *Trends III*) responded that they have “not yet” done so.

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Table 10. Q15. In the framework of the Bachelor/Master structure, has your institution recently defined the entry requirements for Master level programmes?



* This response option available only in *Trends 2010*

As seen earlier, 77% of institutions report having re-considered their curricula in connection with the Bologna Process, particularly with regard to adapting programmes to the new degree structure. As discussed for the Bachelor, curricular reform ranges from simply cosmetic to much deeper change:

- At worst, long integrated qualifications have been split into Bachelor/Master elements on a 3+2 or 4+1 basis, with no pedagogic and little intellectual innovation to mark the transition.
- At best, this re-consideration has involved a conversion to student-centred learning, principally by introducing a learning-outcome approach.

The characteristics of student-centred learning – small group work, varied patterns of assessment, pedagogies such as problem-based

learning, integrated research and work placement elements, not to mention the disposition of physical space and the availability of e-learning materials – are easier to develop when cohorts are small. They require, however, substantial academic staff development as well as academic counselling facilities and more versatile management information systems (cf. Section 2.7). Once student-centred learning becomes the priority and once it is supported by modularisation, Master level cohorts cease to be perceived as homogeneous. Decisions have to be taken about what is 'necessary', what might be optional, what might be omitted altogether, and what particular students need for their professional or personal development.

Acceptance of the Master

It is clear that institutions and students have more readily embraced the Master degree as compared to the Bachelor. In those countries in which long, integrated qualifications were

traditional and in which the new three-cycle structure has yet to be firmly embedded, most students will still opt to proceed from the Bachelor to the Master level. In some cases, the regional and national labour markets do not have the capacity to absorb Bachelors – either because of controlled access to the professions or lack of employment opportunities resulting from the economic slow-down.

In all probability, the Consecutive Master will retain the confidence of some national systems and their stakeholders (students, parents, employers, policy makers) for as long as public funding makes access to it affordable. How this situation will evolve in the medium term is difficult to predict. Assuming no change on this front, the Bachelor is likely to remain relatively disregarded by the labour market until such time as its place in national qualifications frameworks becomes established. These are early days.

The post-experience MBA can usefully be described as ‘professional’. But a number of national binary systems use the term ‘professional’ to designate degrees from the non-university sector. These Masters have different requirements, contents and outcomes from those in the university sector. They tend to serve national and regional labour market needs. The professional development Masters holds significant employability value, but in terms of Bologna it has low visibility – and will continue to do so until a comprehensive lifelong learning perspective is accepted.

To the extent that Master level study is undertaken for the purpose of career enhancement, one would also expect employer involvement in course design. Close involvement, however, now stands at 24%, falling back from 29% in *Trends V* and 32% in *Trends III*. Without further research, it is difficult to assign causes to this decline but, as mentioned above, it may be that there is no longer an acute need to consult employers on curricular design because the work is considered as finished for the moment.

2.2.4 Doctoral level

Doctoral education was formally incorporated as the third cycle in the Bologna discussions in 2003, following an EUA project that identified the need to bring changes to Doctoral education, and the EUA Bologna Seminar in Salzburg that identified common principles for that level (EUA 2005), the results of which were included in the 2005 Bergen Communiqué. The changes at

Doctoral level have been most impressive in their depth and speed of implementation. Most probably this success is due to the grassroots nature of these changes. Growing international cooperation and the emphasis on early stage researchers and their careers in the context of the European Research Area have been further change drivers.

Implementation

The European tradition of the Doctorate – as the production of a piece of original research under the supervision of one professor, with very little emphasis on taught courses – has been increasingly questioned in recent years. Discussions have focused on the need to make Doctoral degree holders more competitive internationally, which has led to a decade of successful experimentation with the introduction and funding of structured programmes and graduate or research schools in some countries. After the broad dissemination and discussion in the academic community of the Salzburg Principles (EUA 2005), additional steps and studies were proposed in a second Doctoral project carried out by EUA for the Bologna Process and presented at the 2007 London Ministerial meeting.

The changes brought to Doctoral education in the past few years have focused on the need to embed Doctoral programmes at institutional level by:

- Creating structures, such as Doctoral/ research or graduate schools, in order to provide a dynamic research environment and create reliable quality standards for supervision and support.
- Introducing more taught courses and training elements to broaden the perspectives and competence profile of Doctoral candidates, including e.g. transferable skills provision, in some cases with credits attached, and without losing the strong role of the mentor.

An increasing number of institutions are offering additional taught courses (49% in *Trends V*; 72% in *Trends 2010*) and structuring Doctoral programmes at institutional level. *Trends V* already revealed a noticeable trend toward the creation of new structures such as Doctoral/graduate/research schools and other structured programmes, in order to provide more stimulating research environments, promote cooperation across disciplines, ensure critical mass, and enhance opportunities for international collaboration and inter-institutional cooperation. These structures also provide a clear and visible

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anchor for links with industry, business or public services. Since then, this trend has continued: today 49% (as opposed to 29% in *Trends V*) have Doctoral schools that include only PhD students while 16% include both Master and PhD students in such structures.

The establishment of Doctoral schools is raising the question of the organisation of transparent admission processes, assessing the thesis, and monitoring completion rates. Particularly, the move away from the traditional, one-to-one apprentice relationship toward arrangements based on a contract between the Doctoral candidate, the supervisor(s) and the institution has entailed thinking of ways to raise and ensure standards of supervision, e.g., through developing professional training for supervisors. These are being offered at many universities and perceived as a key element of institutional profiling and international competitiveness.

Acceptance of the Doctorate (by the non-academic labour market)

While there is consensus that original research has to remain the core component of all Doctorates there is increased recognition of the importance of transferable skills training for all Doctoral candidates. The aim is to raise awareness among Doctoral candidates of the importance of identifying and enhancing the skills that they have developed as a means of improving their employment prospects and career development in and outside academia. If the non-academic labour market becomes the destination of an increasing number of Doctoral candidates, are the generic skills sufficient to meet employers' expectations? Much progress has been made in this area but more needs to be done in order to embed transferable skills development into the education of Doctoral candidates.

The DOC-CAREERS project of EUA concludes by noting that:

The main entry point of employment for doctorate holders into non-academic environments derives from the skills they have acquired through learning to perform research. Employers highly appreciate the level of scientific and technical knowledge held by doctorate holders from European universities, including their formal approach to evidence-based arguments, their analytical skills and ability to integrate knowledge from different sources and their ability to work at the frontiers of knowledge. (EUA 2009d: 103).

The report points out that companies not focused on research tend to recruit at Master's level, "which suggests that the benefits of a doctorate are not yet seen as compelling for careers that involve no formal research component" (EUA 2009d: 103). Nevertheless, it is estimated that around 50% of current Doctorate holders are employed outside academia, in the public and private sectors, holding both research and non-research positions and it is unlikely that the figure will decrease.

In addition, there are new forms of Doctorates emerging, such as industrial Doctorates and professional Doctorates, that allow those working in particular in the professions to pursue Doctorates in their professional fields. The DOC-CAREERS project noted that "Collaborative doctoral programmes, with their exposure to non-university environments, are seen as an excellent way to improve candidates' ability to relate abstract thinking to practical applications and vice-versa, as required for the development of new knowledge, products or services" (EUA 2009d: 103). In these new forms of Doctorates, the core component remains original research.

2.2.5 Future challenges

There has been significant progress with the implementation of the three-cycle degree structure. Reforms at Doctoral level has been taken up, developed and promoted particularly actively by the sector itself.

The degree landscape in Europe, however, is still very complex. Institutional leaders are grappling with this complexity and trying to clarify it within their institutional contexts. Indeed, the proliferation of Masters in general (regardless of types) is an issue of concern to many institutions from both an academic and financial standpoint. Their different denominations and purposes must be clarified through learning outcomes and, ultimately, each institution's Master provision must be aligned to its profile and the community of learners it purports to serve. In the long term, this simplification task will be made easier as the Bachelor level gains more acceptance. This will affect how the Master level is perceived and conceived and "The Master will gain distinctiveness as a result" (EUA 2009a: 6).

Furthermore, there is widespread, albeit anecdotal evidence to suggest that where it is assumed that all students will move on to the second cycle, higher-level research skills are traditionally not introduced in the first cycle, thus raising questions about the employability of Bachelors in a knowledge-intensive work environment as well as about the pipeline to research-based Masters and Doctorates.

As an entry point to the labour market, it appears that the acceptance of the Bachelor is problematic, particularly in countries that used to have very long first degrees and where the shorter Bachelor represents a cultural shock to the system. It is too early to know, however, if the limited evidence collected so far points to emerging trends or to the economic conjuncture linked to the current financial crisis. It is also hard to gauge how employers view Bologna graduates because the first cohorts are only now beginning to exit the system and effective tracking of graduates is lacking in many countries. In this context, it is important to recall that ISCED 5 band still aggregates the Bachelor and the Master thus hindering detailed statistical analyses of employment patterns.

Given the significant changes represented by new degree structures, acceptance will improve with better communication involving a variety of stakeholders and certain steps can be taken by national authorities and institutional leaders to address this situation.

From an institutional perspective:

- Institutions should develop further career guidance services for first-cycle graduates and more flexible study programmes that integrate periods of internship or international mobility into the curriculum. They should develop tracking systems for graduates at all levels and work with employers to understand the needs of the labour market.

- There is a general need to persuade academic staff of the value of the first-cycle degree in order to communicate effectively with employers. This involves understanding that employability depends on knowledge, competences, skills and aptitudes. It also depends on economic and labour market conditions. Among these, as the Eurostat/Eurostudent report to Leuven showed, age, gender, discipline and recent graduation play an important role. Many of the answers to the employability question therefore lie in changed attitudes to lifelong learning and considerations of equity.
- The progression from the Bachelor to the Master and the Doctorate needs to be thought of in a flexible manner and as a continuum, even if students should be encouraged to stop and come back at any point in their studies. At the same time, each level must retain its distinctiveness and specific benefits. The first two levels should be looked at also from the perspective of those who will continue on to pursue Doctoral education.
- Some measure of diversity in Master provision is welcomed as a way to respond to different needs, as long as the purposes of each Master are clearly identified and communicated.

From a policy perspective:

- As major employers, national authorities can and should take actions to recognise and 'legitimise' first-cycle qualifications. This has been a recurrent concern in all the *Trends* reports and the situation does not seem to be improving. National authorities should, as a matter of urgency, review their employment policies and practices, with a view to ensuring entry points within the public sector for first-cycle graduates.
- Each country will have to find the appropriate balance between first-cycle graduates who enter the labour market directly and those who go on to second-cycle study. The national context, economical, cultural demographic and political, will determine the balance achieved in each case. Nevertheless, it will be important to avoid jeopardising career prospects for those completing first-cycle degrees by being overly restrictive in admission to the second cycle in times in which the labour market does not yet value first-cycle degrees.

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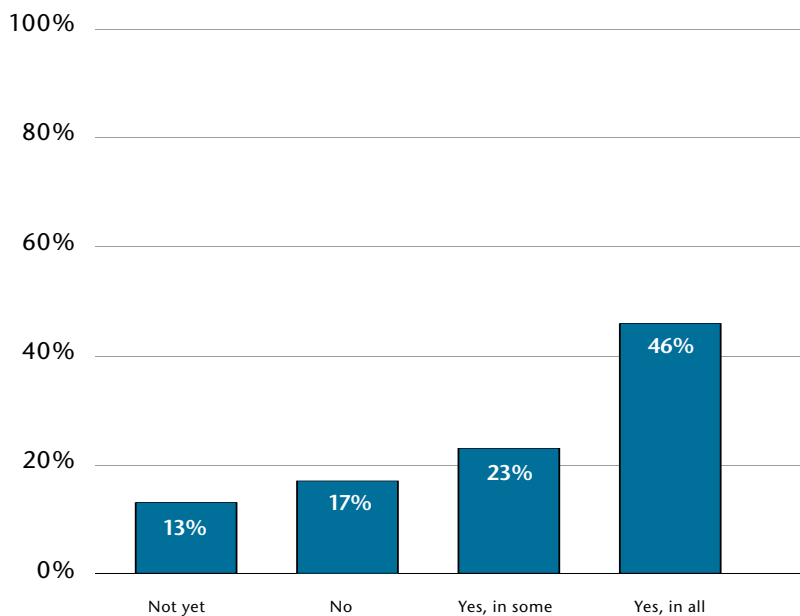
2.3 Building flexible curricula: tools for implementation in institutions

As discussed earlier, the concept of student-centred learning is facilitated if there is modularisation and identification of learning outcomes that are expressed in ECTS points, course descriptions and programme profiles as well as in the Diploma Supplement. Thus, the following section discusses the Bologna tools that must be implemented by institutions: modularisation, learning outcomes, ECTS and the Diploma Supplement. These tools must be linked to the national reference points, which are addressed in Section 2.4.

2.3.1 Modularisation and learning outcomes

Institutions were asked if they have changed “the organisation of their study programmes from a system based on the academic year to one based on study units or modules”: the change has affected the organisation of all study programmes for 46% of respondents; 23% indicated that they had made this change in some programmes; while only 17% responded that they have not done so and see no need to do so.

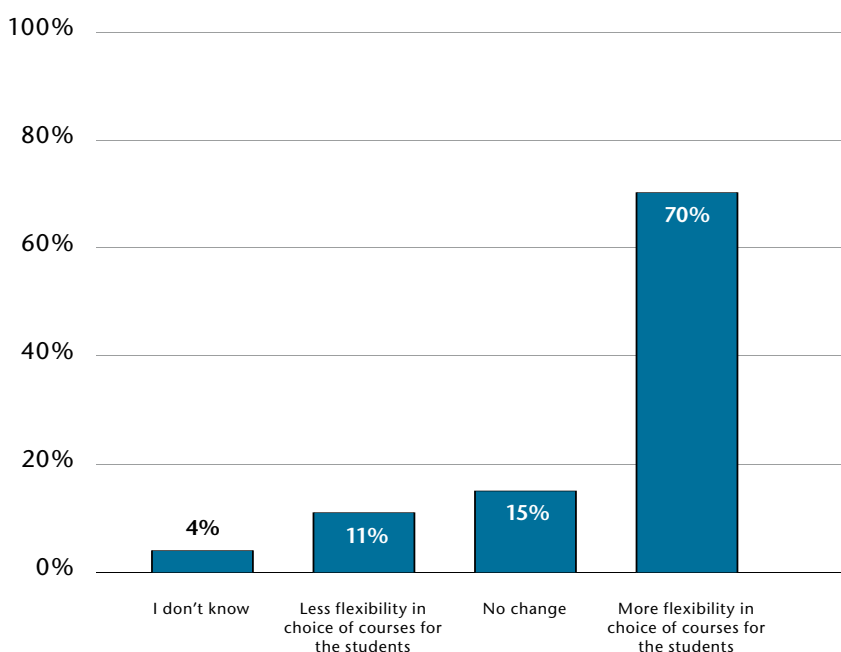
Table 11. Q18a. Have you changed the organisation of study programmes from a system based on the academic year to one based on study units or modules?



The institutions that have developed study programmes based on study units or modules were asked if this had led to greater flexibility of choice: 70% of the institutions

answered that modularisation had led to greater flexibility of choice for the students, thus supporting the goal of creating flexible and transparent learning paths.

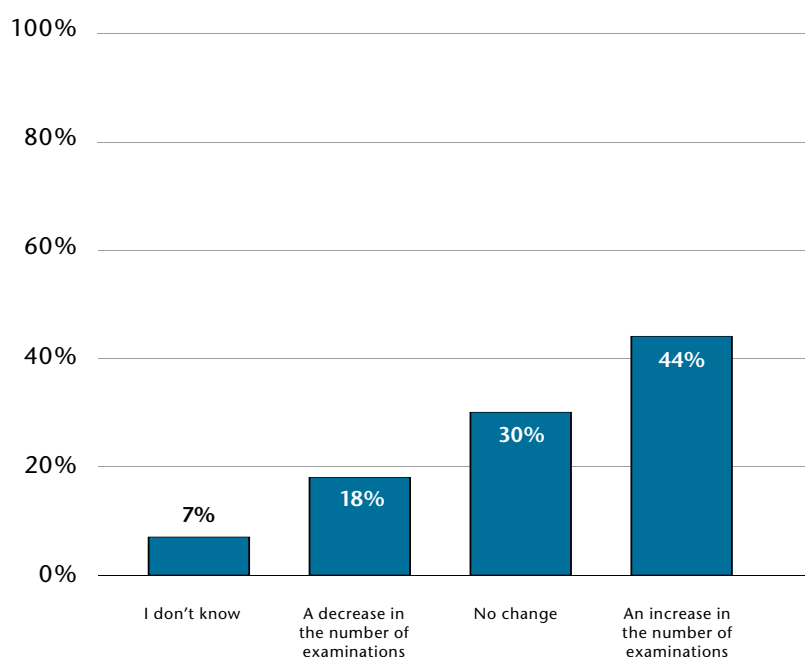
Table 12. Q18b. If yes, has the modularisation of courses led to?



Responses to the question regarding the impact of modularisation on the number of examinations are rather less encouraging with 44% of institutions that have introduced a modularised system reporting an increase

in the number of examinations. This indicates that a coherent approach has not always been taken when introducing modularisation and that a student-centred approach needs to be further developed.

Table 13. Q18c. If yes, has the modularisation of courses led to?



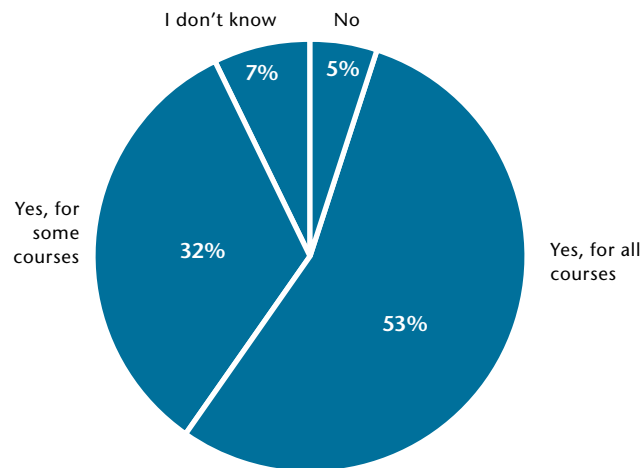
Trends V reported that institutions were slowly moving away from a system of teacher-centred provision and towards a student-centred concept of higher education. It observed that “understanding and integrating the use of a learning-outcome based approach remains a key

medium-term challenge” (*Trends V*: 8). While no data are available on this specific question from previous *Trends* reports, the data from *Trends 2010* regarding the development of learning outcomes, if taken at face value, are encouraging.

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Table 14. Q19. Have Learning Outcomes been developed?



Since student-centred learning is multi-faceted and depends on a combination of several Bologna tools, it is not an aspect that can be measured directly using questionnaire data. However, an indication of progress in relation to more student-centred approaches to teaching, learning and assessment can be derived by looking at a combination of the responses to the questions on modularisation and on learning outcomes and the evidence from the site visit reports, which reveals that two-thirds of institutions said that they modularised and introduced learning outcomes. These are typically from very small HE systems, with one to ten institutions.

Previous *Trends* studies did not ask questions about the extent of modularisation or the use of learning outcomes and therefore no historical comparisons are possible. The variety of data sources on which *Trends 2010* has been able to draw provide some useful glimpses of the extent to which, taken together, student-centred developments are being developed and used by institutions. National Rectors' Conferences appear to be adopting increasingly pro-active approaches to supporting institutions in implementing aspects of student-centred learning and more generally, in coordinating, or at least monitoring, Bologna implementation.

2.3.2 New teaching methods

Changes in the student body and the emphasis of the Bologna Process on student-centred learning require increased focus on developing new teaching methods. The *Trends 2010* site visits indicated that some institutions have begun to support pedagogical skills' developments and curricular reforms but that these changes entail many challenges.

On the positive side, *Trends* researchers reported the use of funding incentives for teaching innovations and the creation of courses for teachers. One university visited had launched a pilot project in 2005 to develop new teaching methods and invested in its infrastructure by transforming large lecture rooms or auditoriums into smaller rooms suitable for group work and seminars, and in funding new positions for faculty coordinators as well as pedagogical training for teachers.

It is clear, however, that the changes required have not been easy for a number of reasons, first and foremost because of legal and regulatory constraints, for example in respect of:

- Teaching workloads: these are quite heavy in a large number of countries. The shift

to student-centred learning entails a more creative approach to teaching and therefore even more hours spent on developing new ways of teaching. Institutions must find ways to motivate academic staff to spend the time required to design, evaluate and re-design their modules, if necessary, and to assume different roles to those of ex-cathedra teachers.

- Staff promotion: the prevailing policies seem to favour research productivity over time invested in improving teaching quality. Depending on the nature of their contracts, the demands placed on younger academics are often becoming heavier because, in addition to their core research activities, they are often expected to undertake significant teaching activities, undergo didactics training, network in their field and publish regularly.
- Types of examination: examinations need to be rethought in the context of teaching innovations. However national legal constraints on examinations, where they exist, curtail the institutional capacity to adapt to its new teaching environment.
- How ECTS is calculated: if ECTS is calculated on the basis of contact hours, which contradicts the basic idea of ECTS as a work-load based system but is still frequent practice in some countries, this might put a brake on innovative teaching methods such as group work or project-based learning.

Secondly, there are issues of cultural change and adaptation for both staff and students:

- Students and teachers are required to become more active and to engage in a different way in the learning process – a challenge to formal and hierarchical cultures or with less interactive learning traditions at secondary school level.
- The new teaching approaches transform the nature of students' work and need to be considered within the changing student body, particularly in order to ensure that part-time students are able to meet the new learning requirements.
- Academic staff in some countries must learn to work as part of pedagogical teams, which represents a challenge to those cultures where teachers are individually responsible for what they teach without any coordination required at the programme level.
- The high average age of the teaching staff can also be an obstacle to change. Younger staff members may be generally more willing to adopt the new methods and ideas but this

is not without a cost. In some cases this has resulted in the transfer of significant levels of responsibility to young staff members while senior staff members grow distant from the students.

Finally, new teaching methods such as blended learning or small-group work (with smaller student-staff ratios) require greater financial resources.

2.3.3 ECTS

ECTS is used today as part of the curricular design but it is useful to recall that this European credit system was developed long before the Bologna Declaration, namely in 1988 in the context of the ERASMUS exchange programme to facilitate recognition of study abroad periods. In addition, many countries had a long history of using credits, for example, the Baltic States, Hungary, Ireland, the Nordic countries, the United Kingdom, and Turkey.

It was only with the launch of the Bologna reforms that ECTS was further developed as a credit accumulation system at national level and gradually mainstreamed as a generalised credit system for the European Higher Education Area. The countries that were using credits before Bologna have reviewed or adapted their national credit systems in order to be compatible with ECTS. Many retain national or institutional rules and guidance for use of ECTS that are consistent with, but more operational and detailed than, ECTS.

The *Trends 2010* data indicate that the implementation of ECTS continues in European HEIs, but that not all institutions have introduced ECTS in the spirit that guided its more recent development as a system for the transfer and accumulation of credits at institutional and national level. 88% of institutions reported using ECTS for credit accumulation for all Bachelor and Master programmes, which is a significant increase as compared to *Trends V* (66%), and 90% reported using ECTS for credit transfer, up from 75% in *Trends V*. In addition, the number of those using a credit system other than ECTS continues to drop.

Given this complex history, and as with *Trends V*, the questionnaire for *Trends 2010* distinguishes between the functions of credit transfer and accumulation.

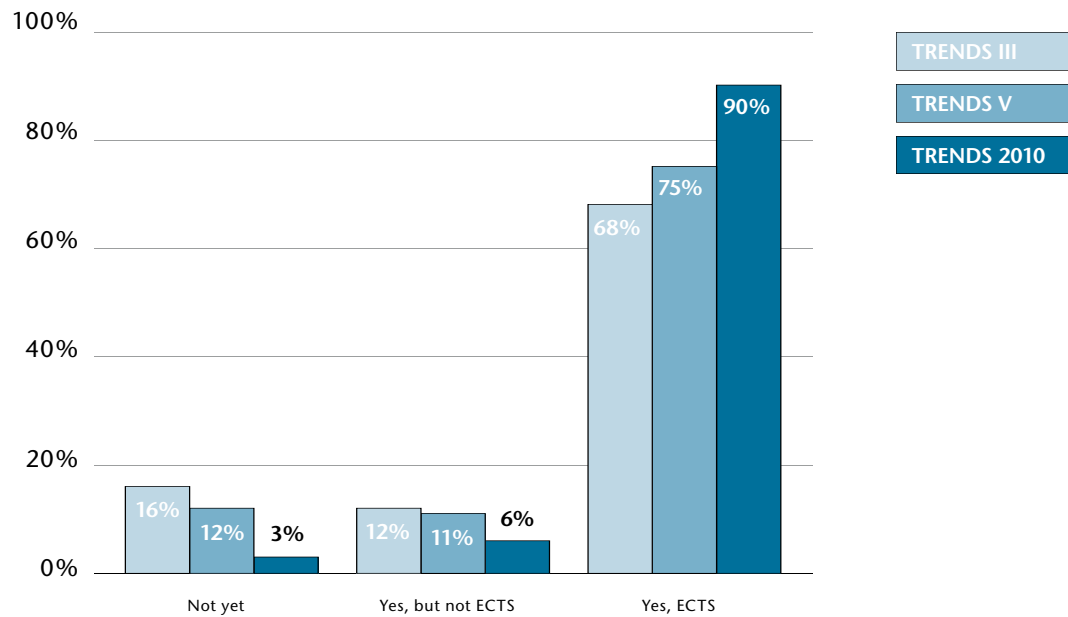
Credit transfer

The following table and the three maps show the progress achieved since *Trends III* (2003) with respect to the use of ECTS for credit transfer. The table presents the institutional responses while the maps aggregate these responses at national level.

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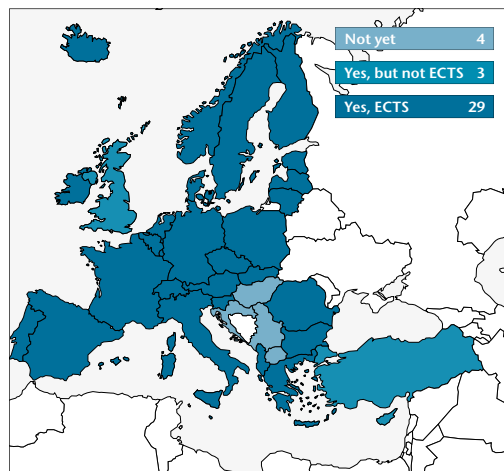
European Higher Education Institutions in the Bologna Decade

Table 15. Q21. Does your institution have a credit transfer system for all Bachelor's and Master's programmes?



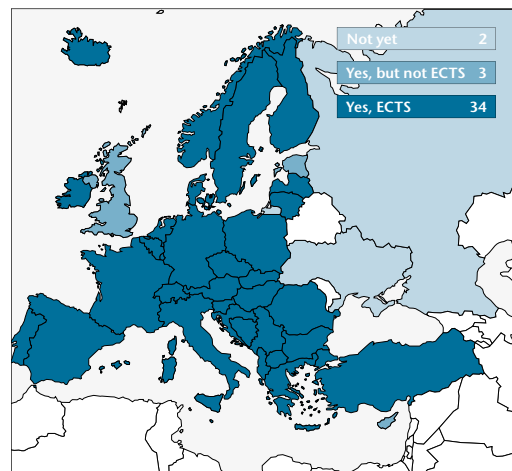
Map 5 — Trends III (2003)

Credit transfer by largest group of respondents



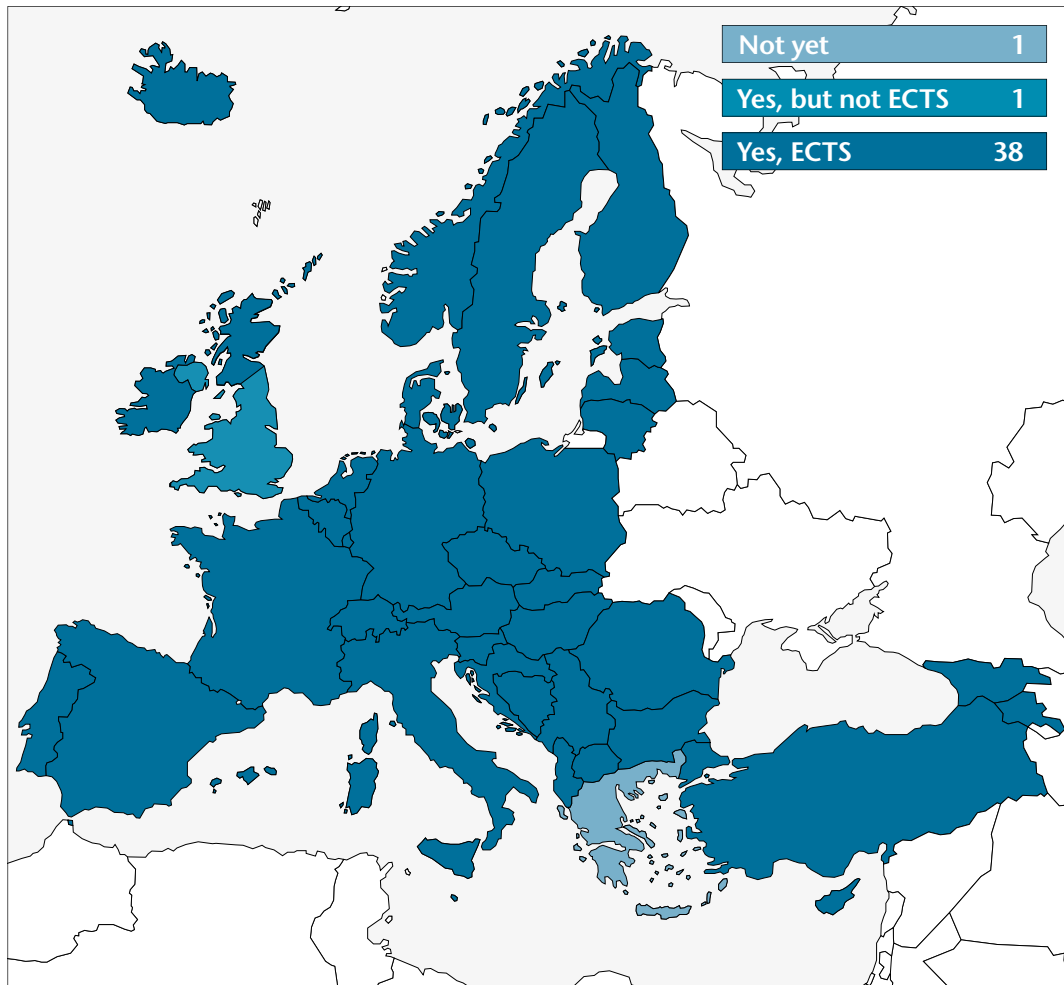
Map 6 — Trends V (2007)

Credit transfer by largest group of respondents



Map 7 — Trends 2010 (2010)

Credit transfer by largest group of respondents



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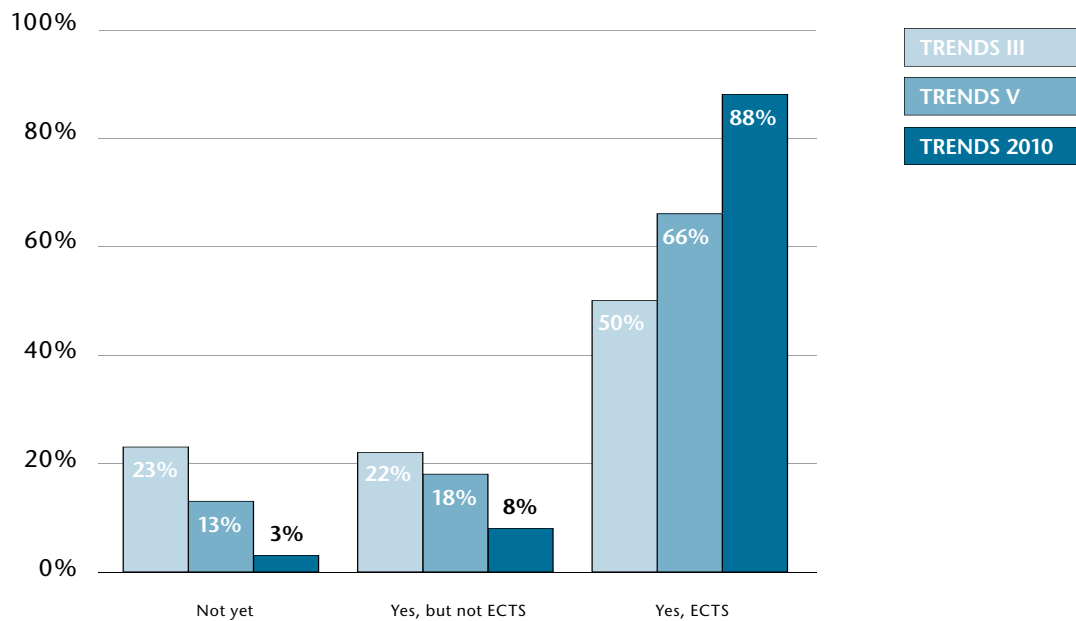
European Higher Education Institutions in the Bologna Decade

The majority of institutions in 38 higher education systems indicate that an ECTS-based credit system is in place, one has developed an ECTS compatible system, and in Greece (“not yet” on the map), Law 3374/2005 put in place a credit system that is compatible with ECTS but the site visit (albeit only one) showed that the national credit system and ECTS were regarded as distinct, despite being apparently identical.

Credit accumulation

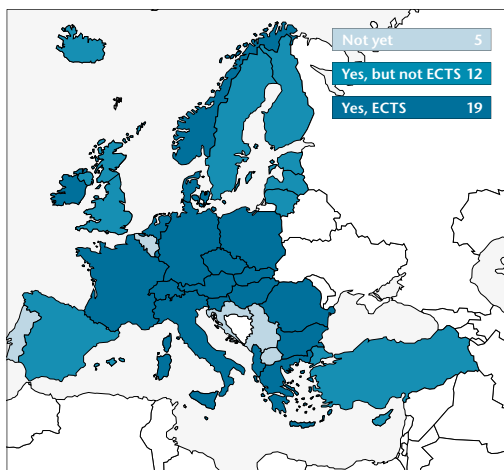
As mentioned earlier, 88% of HEIs responded that they use ECTS for credit accumulation as shown in Table 16. The three maps aggregate these responses at the national level to track longitudinal progress since *Trends III* (2003).

Table 16. Q20. Does your institution use a credit accumulation system for all Bachelor’s and Master’s programmes?



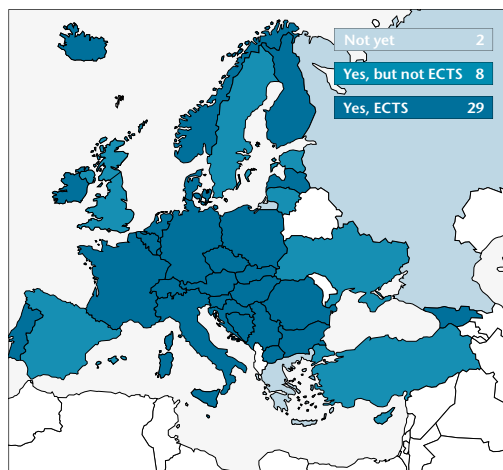
Map 8 — Trends III (2003)

Credit accumulation by largest group of respondents



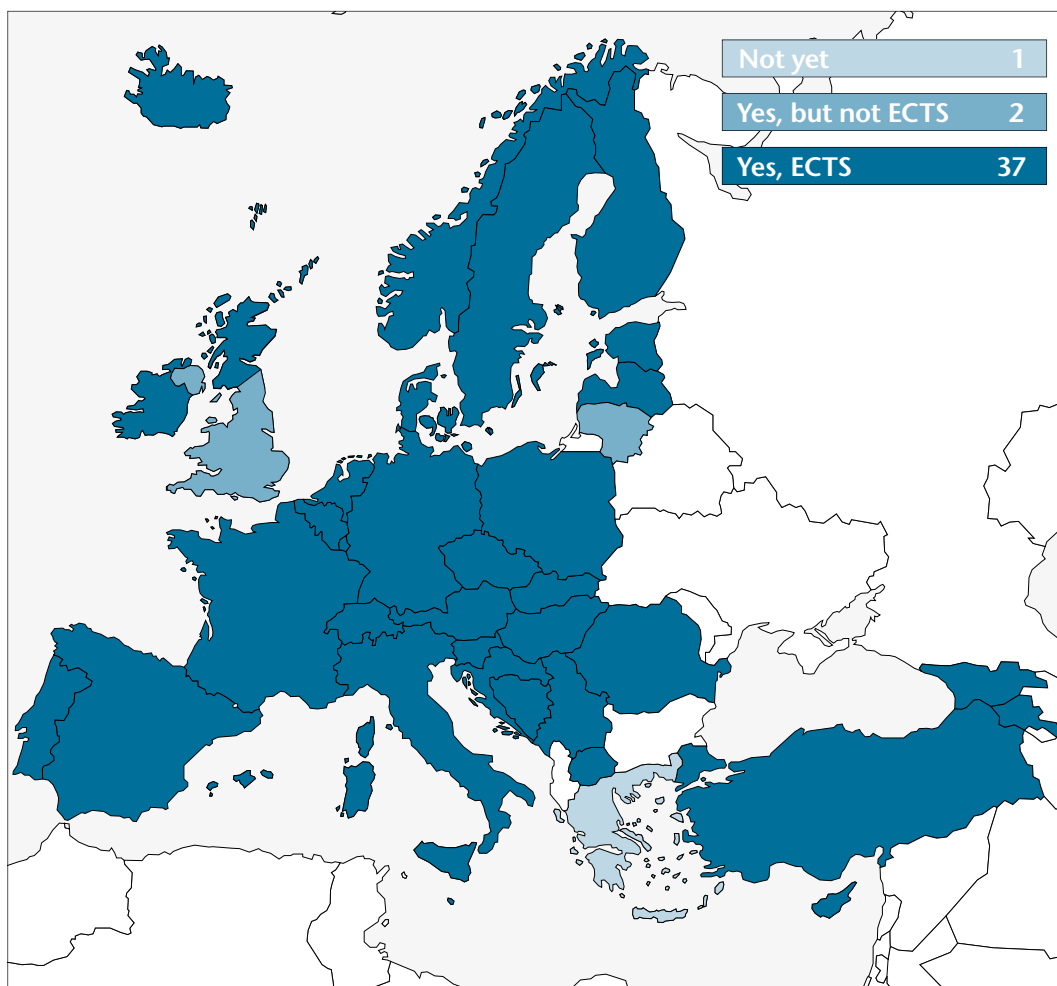
Map 9 — Trends V (2007)

Credit accumulation by largest group of respondents



Map 10 — Trends 2010 (2010)

Credit accumulation by largest group of respondents



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An analysis of the results by country reveals that 37 have a majority of institutions reporting the use of ECTS for credit accumulation, and only England, Wales and Northern Ireland and Lithuania have an overall majority of respondents saying that they use a different credit transfer system. However, this may be a matter of interpretation, as a single system which is compatible with ECTS has recently been adopted in England, Wales and Northern Ireland (UK-EWNI) although its application is voluntary.

ECTS application varies

Despite these advances, however, the most common concerns raised about use of ECTS in the site visits (and previous *Trends* reports) are that it is applied very differently across countries and is implemented superficially in many cases or inconsistently across faculties within an institution and between HEIs in the same country. This concern echoes the findings of other Bologna-related reports.

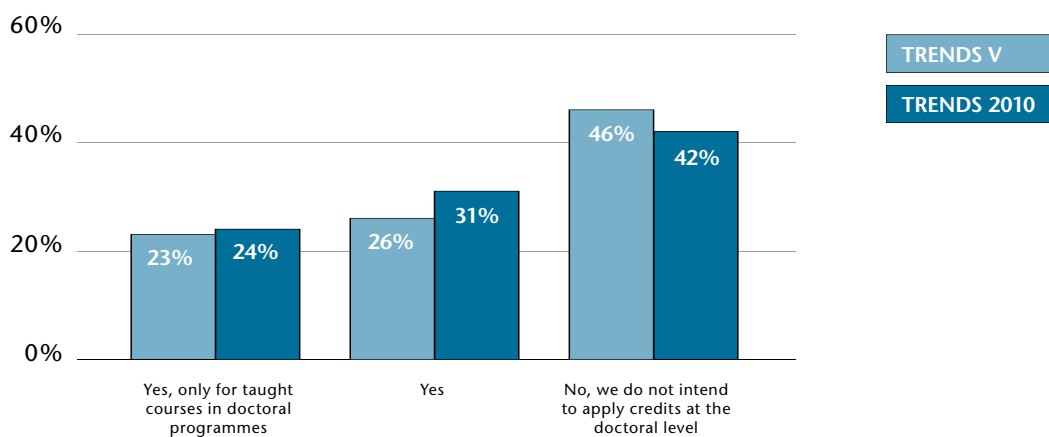
Site visit reports from seven of the countries visited (AT, DE, GR, HU, IT, LV and PL) indicated that workload for ECTS is still related largely to contact hours and of these seven, four (AT, DE, GR and IT) also reflected concerns that workload was not properly or consistently estimated or calculated. In addition to this, there is very little evidence to suggest that learning outcomes are being linked with ECTS credits, although there are some pockets of good practice. Despite some very positive responses in institutional questionnaire responses, site visit reports indicate that course and module descriptions do not include a set of defined learning outcomes with an estimated time to achieve them. There remains some confusion about learning outcomes in relation to use of ECTS, including that some have interpreted the term to mean results as in marks/grades/passes achieved by students.

Already in 2007, *Trends V* had raised the issue of the extent to which real accumulation of credit was in place, and in particular the extent to which programmes have been restructured into units or modules, when

introducing ECTS. The logic of the use of credit accumulation is to allow for more flexible programmes and greater student choice, as well as to use forms of assessment other than traditional examinations to accumulate credits towards the overall degree. As was seen in the previous section, only 46% of the *Trends* respondents have modularised all study programmes (and a further 23% some study programmes), which might be the reason for difficulties in using ECTS as an accumulation system.

Finally, the use of ECTS at Doctoral level is controversial. It is not part of the 2005 Framework for Qualifications of the European Higher Education Area. While some institutions use credits especially in relation to taught courses or transferable skills training many institutions oppose the use of credits in the third cycle, given that the major part of the Doctorate is constituted by original research which, it is widely felt, cannot be measured by credits. In *Trends III*, 47% of respondents answered that ECTS was “not applicable” at that level; in *Trends V*, 46% stated that they do not intend to apply credits at that level. This percentage has decreased to 42% in *Trends 2010* while the number of institutions using ECTS only for taught courses has remained stable (23% for *Trends V* and 24% for *Trends 2010*). At this point it is difficult to assess whether the trend towards using ECTS at the Doctoral level will continue since the difference between *Trends V* and *Trends 2010* is only about 5%, or within the margin of error.

Table 17. Q22. If your institution has a credit system, is it also used at the doctoral level?



In conclusion, apart from the Doctoral level, ECTS has continued its rise as the European credit system even though it is not the only one used across all the Bologna signatory countries. Nevertheless, significant challenges remain, particularly regarding the proper linkage of credits with learning outcomes. In addition and as will be discussed below, considerable problems still arise in relation to the recognition of credits by the ‘home’ institution upon completion of a period spent by a student at another institution, thus hampering mobility and greater cooperation within Europe.

2.3.4 Diploma Supplement

The Diploma Supplement (DS) was developed by the European Commission, the Council of Europe and UNESCO/CEPES in 1997-98 with the intention of facilitating mobility through recognition (EU 2009d). Amended guidelines incorporating the development of learning outcomes and qualifications frameworks were approved in 2007 (UNESCO/CEPES & Council of Europe 2007).

A recent joint ENIC/NARIC and ENQA project provides a range of insights about the use of the DS through a comparison of a sample of 26 DS from 22 countries. The project report concluded that the sample showed considerable variety in “content, structure and lay-out”, thus hindering the relevance and quality of the document, and that “several Diploma Supplements seem to be written for domestic use only... Information was sometimes provided only by using national

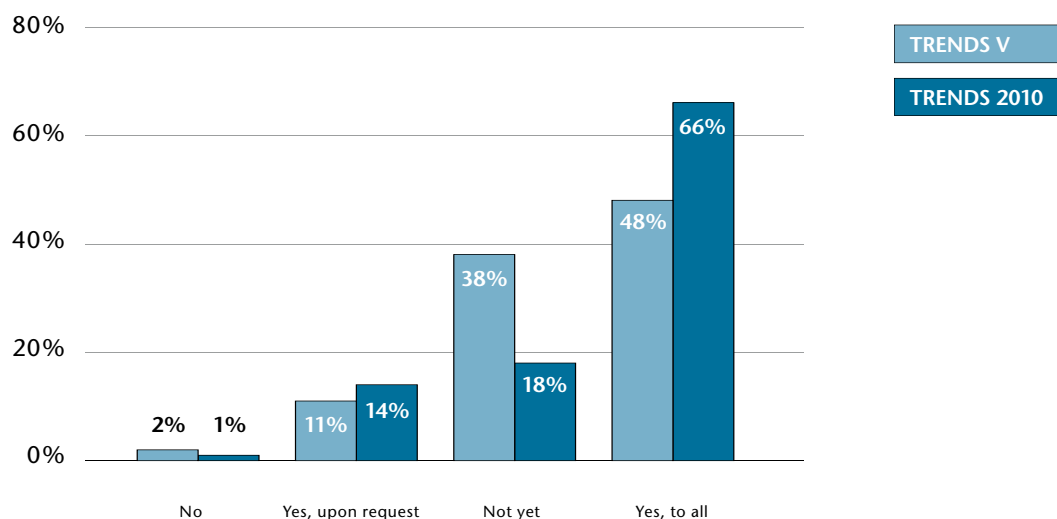
terms, or even national abbreviations, that did not assist the international reader” (Aelterman *et al* 2008: 12).

Among institutional respondents to the *Trends 2010* questionnaire, 66% report that they currently issue the DS to all students, 14% do it upon request and 18% have plans to do so in the future. The remaining 1% of respondents who had no plans to introduce the DS represents a total of 10 HEIs, out of 821 institutional responses. Modest growth has taken place since *Trends V* and evidence from the site visits indicate that the DS does not seem to have reached its full potential. In addition, based on the site-visits, the DS seems to be an administrative tool, distant from academics and academic concerns.

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Table 18. Q29. Does your institution issue a Diploma Supplement to graduating students?



Trends 2010 introduced a new question, asking whether or not the Diploma Supplement is issued free of charge: 91% of respondents who issue the DS indicate that it is issued free of charge.

The *Trends V* report suggested that the DS was perceived as a valuable tool for international mobility or the international labour market, but with less relevance locally, which explained the fact that 62% of those institutions that saw themselves primarily as serving a European community stated that they issue the DS to all graduating students, while only 41% of institutions serving a regional community said they do so. The *Trends 2010* results do not support this argument as strongly any longer. It is clear that the institutions with a European focus are most likely to issue the DS, but while the figure for institutions with a regional focus has increased significantly, the lowest number of institutions that issue the DS to all students is found among the institutions with a worldwide focus (it is worth noting that this was also the case in *Trends V*).

There is little evidence to date of the DS having a significant impact on graduates' entry into the labour market. Evidence from the site visits undertaken for EUA's Master degree study (EUA 2009a) also indicate that in Germany, Poland, Spain, and Sweden, the DS was either unknown or unused by employers. Only in Poland was there any suggestion that it might gain currency.

In conclusion, there is now a wider use of the Diploma Supplement and the data represent a small step forward since *Trends V*, maintaining momentum towards full implementation. However, it is also clear that implementation is not universal and while overall two-thirds of institutional respondents reported that they issue it to all graduating students, behind this figure there is significant variation in levels of implementation.

2.3.5 Recognition of Prior Learning (RPL)

In the later years of the Bologna Process, with the heightened focus on increasing

and widening participation and providing education in a lifelong perspective, the recognition of prior learning has become increasingly important, and has been supported by the introduction of clearer definitions of learning outcomes, modularisation and the development of qualifications frameworks. Expanding the range of learners has become a key strategic issue (cf. Section 2.5). It is a challenge for institutions, however, to develop and further improve systems for fair assessment and validation of all forms of prior learning, be it for non-traditional students or international students wishing to continue their educational trajectory.

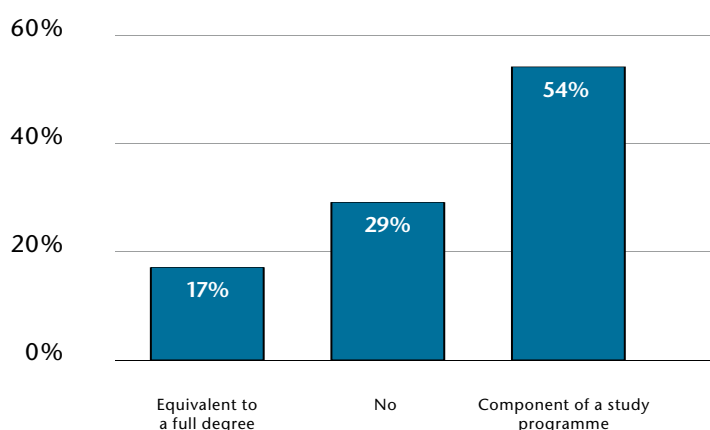
When the recognition of prior learning was introduced into the Bologna Process in Bergen (in 2005), a rather complicated understanding prevailed, ranging from: accreditation of prior learning (APL), of prior certificated learning (APCL), of prior experiential learning (APEL) and work-based learning (WBL) to the present understanding of having the possibility of recognising prior learning in whatever shape and form it takes:

- as a way to access to higher education
- as elements of a higher education programme or
- as recognition for the equivalence of a full degree

Common practices for the recognition of prior learning have been in place in many countries for decades in order to improve higher education access, but new ground still has to be broken when it comes to recognising formal, informal and non-formal prior learning as part of a study programme or as validation of experience that qualifies as a full degree course.

The *Trends 2010* data indicate that 54% of European HEIs recognise prior learning as a component of a study programme, but neither the *Trends* data nor the site-visits were able to say much about institutional practice as very little institutional data are collected. When it comes to validating prior learning as being equivalent to a full degree one country stands out. In France, 68% of HEIs state that they have procedures in place for recognising prior learning as equivalent to a full degree for students without formal qualifications. The practice was first initiated by law in 2002. Other HE systems where HEIs practise such full-degree recognition are, according to the survey, B-Flemish Community (29%) and B-French Community (22%), England/Wales (14%), Ireland (15%), Norway (15%), and Scotland (23%). Nearly one third of the HEIs in *Trends 2010* indicate that they do not recognise prior learning at all.

Table 19. Q24. Does your institution recognise prior learning (e.g., work experience)?



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The table in Annex 6 indicates that 12 countries have national policies in place for recognition of prior learning, and that 19 are developing such a policy according to the Draft 2008 joint progress report of the Council and the Commission on the implementation of the “Education & Training 2010” work programme (2008). In practice, institutions in a majority of European countries have limited (legal) opportunities to enhance diversity by accepting students from non-traditional learning paths (cf. Section 2.5).

2.3.6 Future challenges

Despite many advances, there is evidence that curricular design to fit the new degree structure amounts in many cases to a compression of existing curricula during the first cycle and more work is required with respect to ECTS practices. Given the recent developments, the Diploma Supplement must integrate learning outcomes and qualifications frameworks as recommended in the 2007 amended guidelines. The Bologna discourse has shifted now to student-centred learning, modularisation and learning outcomes and this can have positive effect in creating a coherent framework that addresses the needs of a variety of learners:

- Modularisation and a learning-outcome approach can potentially stimulate the growth of interdisciplinarity and optional courses in a study programme, thus increasing the potential for innovative studies that can better address each student’s interests and potentially enhance employment opportunities.
 - A learning-outcome approach can facilitate better links between research and teaching by introducing some research activities already in the first-cycle.
 - A learning outcome approach can promote recognition of prior learning. Applicants can indicate in their applications/portfolio how their learning has been achieved. Their work can be compared to the level descriptors in the qualifications framework.
- Finally, there are also examples at national level of successful delegation of responsibility to institutional actors, such as national rectors’ conferences (e.g. CH), which promotes broader ownership of the reform process.

From an institutional perspective:

- A more student-centred approach does create significant workload for academics, particularly the first time that the curriculum is re-designed and there are significant staff training and development implications in moving to a student-centred approach.
- A student-centred approach can increase or shift the workload of students and certainly requires a period of adjustment on the part of students. Students may be resistant to student-centred learning, at least in the first instance, particularly if they are not involved in the dialogue about proposed changes. It is important to involve students in this dialogue, as they will need to be active participants. Students will also need support and guidance to develop more independent learning skills.
- Individual components of a student-centred approach will each have an impact, but the overall impact of a combination of measures is likely to be much more significant. For example, learning outcomes with a modular curriculum will increase student choice. Modularisation with new approaches to examination will offer greater flexibility.
- The Bachelor curricula will need to be reviewed in order to ensure that they are not simply a compression of existing curricula. One way of reducing the financial or administrative burden is to review curricula within their existing quality assurance cycles, rather than impose arbitrary timescales or deadlines.
- ECTS must be calculated in a systematic and clear way and used not only for transfer but also for accumulation.
- There remains a lack of evidence of interest from employers and sporadic concerns

about the usefulness of the Diploma Supplement, particularly in proportion to the resources required to implement it. There is also evidence from the site visits that awareness of the Diploma Supplement amongst academics is still worryingly low. It seems that the Diploma Supplement has become an administrative task – one that requires reframing and linking to learning outcomes and qualifications frameworks as suggested in the 2007 amended guidelines.

From a policy perspective:

- Shifting to a student-centred learning approach is resource-intensive and requires adequate financial resources to support

the required student-staff ratios, the development of blended teaching material, staff development and appropriate classroom infrastructures.

- In the light of the *Trends 2010* evidence, it might be worth encouraging countries (possibly via the national rectors' conferences) to develop and agree common approaches at national level for the use of ECTS, covering such aspects as the estimation of student workload and the link between modularisation, learning outcomes and ECTS credits.

2.4 European frameworks at the system level

Section 2.4 concentrates on the architecture, at European and national system levels, that frames the Bologna three-cycle degree structure as described in Section 2.2 and the implementation of the Bologna tools in institutions set out in Section 2.3. These framing instruments include the European and national qualifications frameworks, the European quality architecture consisting of the European Standards and Guidelines for quality assurance (ESGs) and the European Quality Assurance Register (EQAR) and, finally, international recognition agreements and related national implementation arrangements.

These European frameworks and reference points that have been, or in the case of qualifications frameworks are being, translated into national systems, are crucial for the successful implementation of the Bologna reforms in institutions. One very clear example, as discussed in Section 2.3, is that modularisation, learning outcomes and ECTS must be looked at together, and need to be linked to qualifications frameworks in order to facilitate both horizontal and vertical mobility, recognition of prior learning, etc., for traditional and non-traditional learners, and national and international students.

2.4.1 Qualifications frameworks

At the Bologna Ministerial Conference held in Bergen in 2005, Ministers adopted the Framework for Qualifications of the European Higher Education Area (QF-EHEA), based on three cycles, with generic descriptors based on learning outcomes, and credit ranges for the first and second cycles,

and committed to elaborating compatible national qualifications frameworks (NQF). This commitment was reinforced in the London Communiqué (2007), which stressed the importance of qualifications frameworks as instruments for achieving comparability and transparency within Europe, facilitating the mobility of learners, and supporting institutions in the development of modules and study programmes based on learning outcomes and credits and in the recognition of different types of learning. The Leuven-Louvain-la-Neuve Communiqué (2009) set the goal of implementing all national qualifications frameworks and preparing them for certification by 2012.

Cycle descriptors, such as the 'Dublin' descriptors (Joint Quality Initiative 2004), which are "broader and more generic", have been developed and can provide "a context to help national authorities develop their own more detailed descriptors" for each qualification level (Adam 2008: 10).

In addition to the QF-EHEA, the European Qualifications Framework for Lifelong Learning (EQF-LLL) was formally adopted by the European Parliament in April 2008. It is more comprehensive than the QF-EHEA and encompasses all levels of education, against which national frameworks should also be referenced.

The introduction of national qualifications frameworks (NQFs) is proving to be slower than expected. One of the reasons identified for the delays is the existence of these two overarching European frameworks. While there is consensus that the differences between the two frameworks are much fewer than the commonalities, and that it is

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perfectly possible to develop NQFs that can be referenced against both, the Stocktaking report recommends that countries should not wait until their NQF is developed in accordance with the EQF-LLL (i.e., covering all levels of education) but should move ahead, develop their higher education framework, and link it at a later stage.

The 2009 Bologna Stocktaking Report shows that by early 2009 only six HE systems (BE-FL, DE, IR, NL, UK-EWNI and UK-SCOT) had developed a NQF compatible with the overarching QF-EHEA, i.e., by ensuring that all national qualifications are described and visibly linked to learning outcomes, and that a self-certification process against the QF-EHEA has been successfully completed. Moreover, most of these six HE systems had started the process long before 2005 when the European Framework was adopted. According to the Stocktaking Report (2009), a NQF has been agreed upon and is ready for implementation in a further six countries but has not been certified yet against the overarching framework(s). The NQF discussions have started in an additional 21 countries.

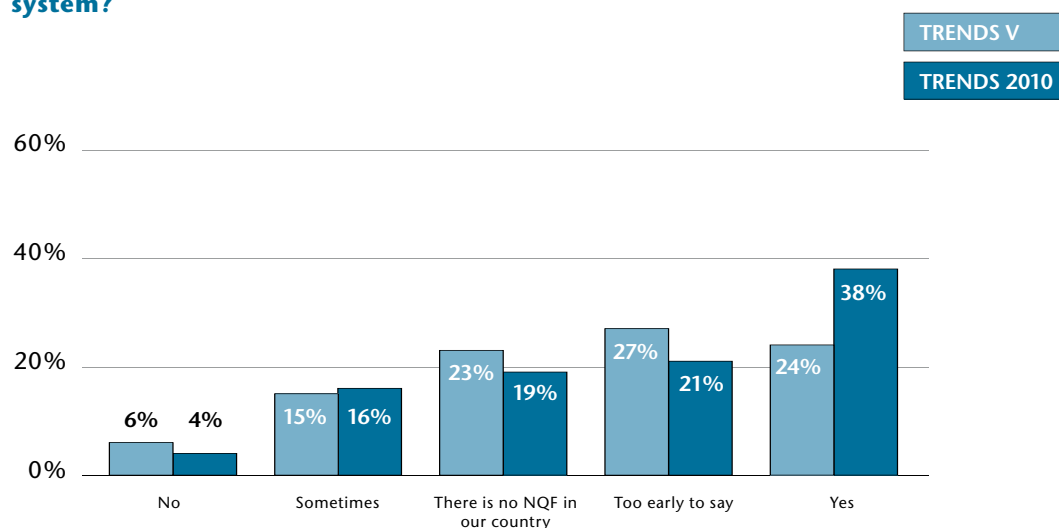
The QF-EHEA was carefully drawn up in order not to be restrictive, yet there is some evidence to suggest that an erroneous belief has developed in some quarters that the framework requires a '3+2' or 180 ECTS + 120 ECTS model, or a cumulative total of 300 ECTS for 1st and 2nd cycle. In fact, the QF-EHEA indicates that first-cycle qualifications should carry between 180 and 240 ECTS, while second-cycle qualifications should carry a minimum of 60 ECTS, with 90 ECTS being more normal and with a maximum of 120 ECTS. It will be important for the relevant authorities, when putting in place arrangements for NQFs, to avoid doing so in such a way which might restrict institutions from recognising degrees from other EHEA countries.

It appears that implementation in many cases may be stalled, first and foremost, at the national policy level and that implementation in institutions is more

advanced, at least in terms of the definition of learning outcomes. It is also important to note that many disciplines have identified their learning outcomes as part of (or following) the Tuning Project and are now slotting these learning outcomes into the existing European qualifications frameworks.

In the HE systems where the NQFs have been introduced, institutions have responded that they have been useful and, indeed, *Trends 2010* data from the institutional questionnaires seems positive for a wide range of countries, with 38% of responding institutions saying that their national qualifications framework has been useful when developing curricula corresponding to the Bologna degree system, compared to 24% in *Trends V*.

Table 20. Q23. If there is a National Qualifications Framework in your country, is it useful when developing curricula corresponding to the Bologna degree system?



While this is undoubtedly a positive development, evidence from the various *Trends 2010* sources provides quite contradictory results. The confusion identified in *Trends V* still seems current: many individual institutional responses claim that the NQF has been helpful, yet the results of the 2009 Stocktaking show that the NQF does not exist or has not yet been implemented in their countries. It may be that the distinction between ‘old-style’ qualifications *systems*, usually described by teaching-focused input measures and defined by the specific learning context (and therefore not easily transferred or recognised in different contexts) and ‘new-style’ qualifications *frameworks*, described in terms of learning-focussed outcomes and independent of context (and therefore more easily transferred or recognised), is not yet widely understood.

The contention in *Trends V* that, to be effective, NQFs should be designed coherently with broad societal consultation and strong involvement of higher education institutions appears to be borne out by the evidence from international experience that shows that if an NQF is implemented badly and without the engagement of stakeholders, particularly without the strong involvement of higher education institutions and their associations, the resultant framework may not be fit for purpose and could actually restrict academics and students, stifle creativity and lead to less flexibility and less mobility (e.g., Blackmur 2004). This is an

important consideration given the number of countries that are still at an early stage of developing NQFs.

2.4.2 European quality architecture

Quality and the global attractiveness and competitiveness of European higher education have been central goals of the Bologna Process and the Lisbon strategy. Quality assurance received a relatively cursory mention in the original Bologna Declaration but, as ministers met every two years to measure progress and define mid-term objectives, the issue grew in importance, until it rose to the fore of the ministerial agenda and became one of the first policy objectives, particularly between 2003 and 2007:

- The Berlin Communiqué (2003) recognised the primary role of higher education institutions in monitoring quality (this constituted the first such official acknowledgement in the context of the Bologna Process) and invited quality assurance agencies, students and higher education institutions – through their representative associations, assembled in the ‘E4 Group’ (ENQA, ESU, EUA and EURASHE) – to develop an agreed set of “standards, procedures and guidelines” on quality assurance and to explore the possibility of a “peer-review” of quality assurance agencies.

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- The Bergen Communiqué (2005) adopted a text that presented three sets of standards and guidelines for quality assurance (ESGs): one that applies to higher education institutions and two to quality assurance agencies (ENQA 2005). The Communiqué also gave the green light to the E4 Group to explore the possibility of setting up a European Register for quality assurance agencies and endorsed their proposal for an annual European quality assurance forum.
- The London Communiqué (2007) endorsed the proposal of setting up a European Register of Quality Assurance Agencies (EQAR) that was presented by the E4 Group. EQAR was established in March 2008 to provide a web list of “trustworthy” agencies that have been reviewed on the basis of the ESGs. EQAR is the first structure to result from the Bologna Process. Its Executive Board comprises the four associations composing the E4 Group. Since its creation, EQAR has been processing a steady stream of applications (<http://www.eqar.eu/>) and has attracted worldwide attention.

In parallel, the European Parliament and Council adopted a recommendation in line with these agreements (European Parliament and Council 2006). In addition, the Lisbon objectives have made quality central to European competitiveness and linked to the modernisation agenda of higher education institutions. Last but not least, it is important to note the role of European associations – ENQA, ESU, EUA and EURASHE, discipline-based associations and other HEI networks – that have played an important part not only in the development of an overarching European quality framework but in sensitising their members for the need to develop robust and useful internal and external quality assurance processes, particularly through the annual European Quality Assurance Forum. Thus, much progress has been made in establishing a European quality assurance framework under the impulse of associations of higher education institutions, students

and quality assurance agencies and with the support of the European Commission and national governments.

The newly established European quality assurance framework is meant as a broad structure to ensure the quality of degree awards and does not address research activities or other functions of higher education institutions. The framework respects four main principles: the primary role of institutions in managing and monitoring their quality; student participation in internal and external quality assurance processes; the political independence of quality assurance agencies; and the diversity of national quality assurance procedures.

The stress placed on quality assurance has led to the rapid development of (i) agencies in almost all the countries in Europe and (ii) a number of European evaluation instruments for specific disciplines (such as chemistry, engineering, fine arts and music) thus joining the ranks of the pioneering European evaluation programmes developed by the European Association of Establishments for Veterinary Education, EUA’s Institutional Evaluation Programme and EFMD-EQUIS.

The 2009 Bologna Process Stocktaking Report reveals that, in the four years since their adoption in Bergen, the ESGs have provided the impetus for the internationalisation of review panels; 28 countries have reviewed their quality assurance systems against the ESGs; and students are involved in the external reviews in 42 countries but that their status differs. Particularly, students do not shape the evaluation reports in 19 countries (Rauhvargers *et al* 2009).

It is also worth remembering the larger context and the significant reform process at work in many countries. As was noted in Part I, most rectors’ conferences reported that, in addition to the Bologna Process, at least three national policies have been or are being implemented in their countries. These have dealt with such fundamental issues as governance, funding, autonomy, quality assurance and research. It is clear

from both the institutional responses to the *Trends 2010* questionnaire and the site visits that these reforms have had a central impact on institutional strategies recently and have affected quality development in almost all aspects of institutional provision and management (cf. Table 4, Part I). These internal quality developments, however, have not been necessarily linked to European QA developments, particularly the ESGs. Instead, as will be seen in Section 2.7.2, HEIs seem to be most responsive to their external QA requirements, which have not always integrated the section of the ESGs (Set I) that applies to HEIs or have not been explicit about the link between their evaluation process and European QA developments. This is confirmed by the 2009 Stocktaking Report that indicates that only nine countries examine institutional quality processes against the ESGs (Rauhvargers *et al* 2009).

Despite the significant policy changes, particularly to the scope of institutional autonomy, the main findings of *Trends IV* and *Trends V* still stand. *Trends IV* argued that “there is clear evidence that success in improving quality within institutions is directly correlated with the degree of institutional autonomy” (*Trends IV*: 7) and *Trends V* pointed to the need for external quality assurance systems “to demonstrate that they actually produce an improvement in quality” and lessen “the increasing bureaucratic burden on institutions.” (*Trends V*: 8). Thus, while nearly 80% of *Trends 2010* respondents (as opposed to 74% in *Trends V*) report that their external quality assurance agency takes into account internal quality processes, the overall impression remains, based on the site visits and the Stocktaking Report, that the introduction of new national external evaluation procedures has caused some institutions to pay much less attention to their own internal accountability procedures, thus leading to a compliance culture. This seems to be particularly true when the external agency is perceived as being formalistic and bureaucratic.

It is interesting to note in this context the growth of accreditation processes, which were once the hallmark of quality assurance in central and eastern Europe but have now become more frequently used also in western Europe. In addition, a recent ENQA survey shows many developments in national quality assurance but these seem to have consisted in an accumulation of different quality assurance processes. Thus, nearly 90% of ENQA respondents report that their procedures include several types of

evaluation or accreditation: often programme evaluation/accreditation combined with institutional evaluation/accreditation or audits (ENQA 2008: 25-26). The fact that the majority of ENQA members continue to evaluate or accredit at programme level and so few conduct institutional audits (ENQA 2008: 24) is an important issue to the extent that it leaves little room for institutions to develop more extensive internal quality processes.

Only two national rectors’ conferences that responded to the *Trends 2010* survey reported no changes to external quality assurance frameworks in the past five years, thus confirming the ENQA 2008 survey. The national rectors’ conferences’ responses, however, reveal some weaknesses as to the extent to which the academic community is involved in quality assurance policy developments at the national level or is aware of European developments in this area:

- The national conferences are evenly split in reporting that there has been a national debate on the European Standards and Guidelines (ESGs) but – surprisingly – only eight conferences note that they were included in this debate.
- Only nine of the 27 national rectors’ conferences report any responsibility in developing the national accountability framework; for four of these, this involvement takes the indirect form of nominations to the board of their national quality agencies.

Finally, only five conferences mention that there is an official position on EQAR although ten indicate that there is an unofficial interest in applying for it, thus indicating some caution in approaching this development.

2.4.3 European recognition tools: the Lisbon Recognition Convention and the ENIC-NARIC Network

The Lisbon Recognition Convention was adopted in April 1997, two years before the Bologna Declaration was signed. It is based on the principle of ‘substantial difference’, thus requiring that each country shall recognise qualifications (whether for access to higher education, for periods of study or for higher education degrees) as similar to the corresponding qualifications in its own system unless it can be shown that there are substantial differences between its own

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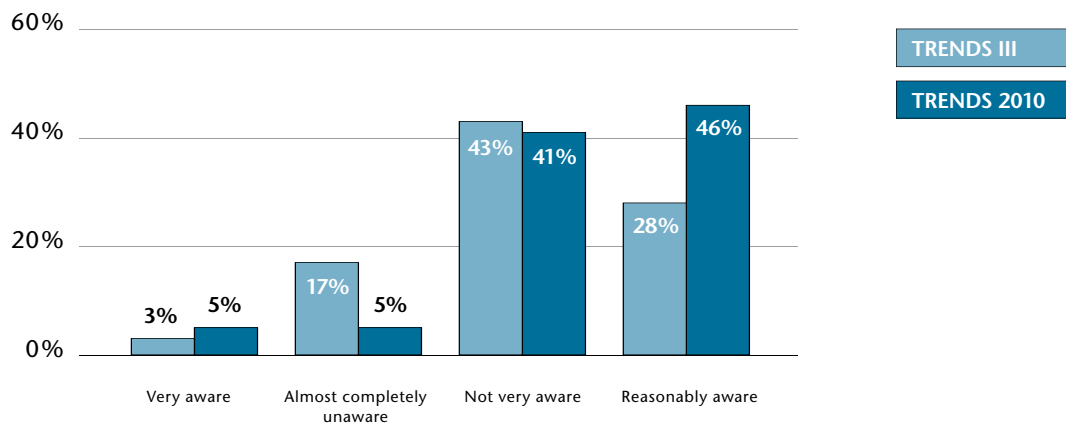
European Higher Education Institutions in the Bologna Decade

qualifications and the qualifications for which recognition is sought. The signature of the Lisbon Convention and its ratification in the meantime by 42 European countries represents an important milestone in the recognition of degrees and study periods, and thus in the promotion of mobility in Europe. The implementation of the Lisbon Recognition Convention is supported by the Lisbon Recognition Committee and the network of national ENIC/NARIC centres that exist in all the Bologna signatory countries.

Trends 2010 data show that awareness of the Lisbon Convention and cooperation with the

respective national ENIC/NARIC centre has increased since *Trends III*. While only 28% of *Trends III* respondents stated that their academic staff were “reasonably aware” of the Lisbon Convention and recognition procedures, the proportion increased to 46% in *Trends 2010*, representing more than a doubling of those who are “reasonably aware”. However, 41% of institutions across Europe are still “not very aware”, and there is a minimal drop of this value since *Trends III*. The percentage of staff that is “very aware” of the Lisbon Convention (5%) has similarly only increased by the same 2%.

Table 21. Q25. To your knowledge, how aware are the academic staff in your institution of the provisions of the Lisbon Convention and recognition procedures, in general?



Cooperation with national ENIC/NARIC centres has increased since *Trends III* (2003), with 34% of *Trends 2010* respondents stating that they have close cooperation and a further 30% indicating limited cooperation with their ENIC/NARIC. In *Trends III*, the corresponding figures were 21% and 24%. The institutions that do not have any cooperation are most often small universities. One possible explanation for the increased cooperation could be the greater influx of non-European students with full-degree in the past decade. The Commission

staff working document tracking “Progress towards the Lisbon objectives in education and training” indicates that the number of students with non-European citizenship has grown by 11.7% per annum, on average. The growth in international student numbers have been faster than the growth in overall student numbers (EU 2009a: 30).

2.4.4 Future challenges

Qualifications frameworks

The 'new-style' qualifications frameworks are based on learning outcomes, an element that is at once the most radical and the least understood. Because learning outcomes are described independently of inputs and of the context of learning, they enable learning undertaken in different contexts to be compared relatively transparently and free of preconceptions or prejudices, thus facilitating the comparison and recognition of learning between different contexts. Learning outcomes and level descriptors can be seen as the basic building blocks of the Bologna reforms and this approach is at the heart of the paradigm shift from teacher-centred to student-centred learning (Adam 2008). It is not yet clear, however, that an understanding of the importance of learning outcomes or of their central role within qualifications frameworks is fully and widely understood in Europe.

- *From an institutional perspective:* An important challenge is to integrate and exploit better the links between qualifications frameworks, learning outcomes and ECTS, and to explain their benefits to academics and students.
- *From a policy perspective:* The *Trends 2010* report endorses the 2009 report of the Bologna Process Coordination Group for Qualifications Frameworks to the Bologna Follow-Up Group, which concluded that developing and describing learning outcomes and ensuring that these are implemented in a non-formalistic and non-bureaucratic way and in the interest of learners will be one of the greatest challenges of the coming years. This requires cooperation of all actors at national level and effective communication to all institutional actors, including students and employers.

Quality assurance

External quality assurance processes have developed considerably both at the national and European level. Because institutional developments are considered in Section 2.7.2, the following addresses the policy dimension only.

From a policy perspective:

- External quality assurance must be developed within the framework of the ESGs, thus respecting institutional autonomy, and in partnership with the higher education community at national level in order to ensure broad ownership and trust and a greater understanding of how national QA developments are linked to the European ones.
- Quality assurance processes are of paramount importance in supporting (or not) institutional diversity and creativity (EUA 2009c) and it is crucial that the ESGs are seen as a set of principles and reference points rather than rules.
- External quality frameworks must support the development of a variety of internal quality processes in order to fit the diversity of institutional profiles. The role of external quality is to review these internal processes while respecting and promoting the primary responsibility of HEIs in designing them.
- In order to ensure that quality assurance serves the higher education sector effectively, national authorities should allow institutions to select any quality assurance agency that is listed in EQAR.

Recognition

From an institutional and policy perspective, recognition must be set in a broader perspective than mobility and include recognition of prior learning and this has implications for the policy and institutional level.

2.5 Responding to the challenges of lifelong learning, widening participation and access

The slow progress towards student-centred learning in a lifelong perspective can be attributed to the fact that it was necessary to implement first the new degree structures and the supporting tools in order to pave the way for the introduction of more flexible and accessible learning paths.

Over the past decade, both the introduction of the Bologna Process and greater institutional autonomy have created the conditions enabling European higher education institutions to adapt more closely their educational provision to the diverse needs

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of learners. The introduction of student-centred learning (with modularisation, learning outcomes and ECTS) has also made it possible for students – particularly those who do not want, or are not able for personal or economic reasons, to follow the traditional route in higher education – to collect credits and acquire degrees over a longer period of time, within certain defined conditions of progression. The move towards more flexible and transparent educational structures through the introduction of the three-cycle degree structure has not been straightforward, but once introduced, the Bologna instruments either already have or can be envisaged to facilitate broader and wider access as well as enhanced lifelong learning opportunities.

2.5.1 Strategies for lifelong learning in higher education

EUA has supported and actively promoted the re-emphasis on the lifelong learning agenda by developing the “*European Universities’ Charter on Lifelong Learning*” in 2008 (EUA 2008b), following a seminar fittingly held at the Sorbonne in December 2007 during the French Presidency. The Charter is a call for European universities and governments, together with the social partners and other stakeholders, to support proactively the lifelong learning agenda, and to assist Europe’s universities in developing their specific role in this context. The charter places all types of higher education – formal, non-formal and informal – in the framework of lifelong learning.

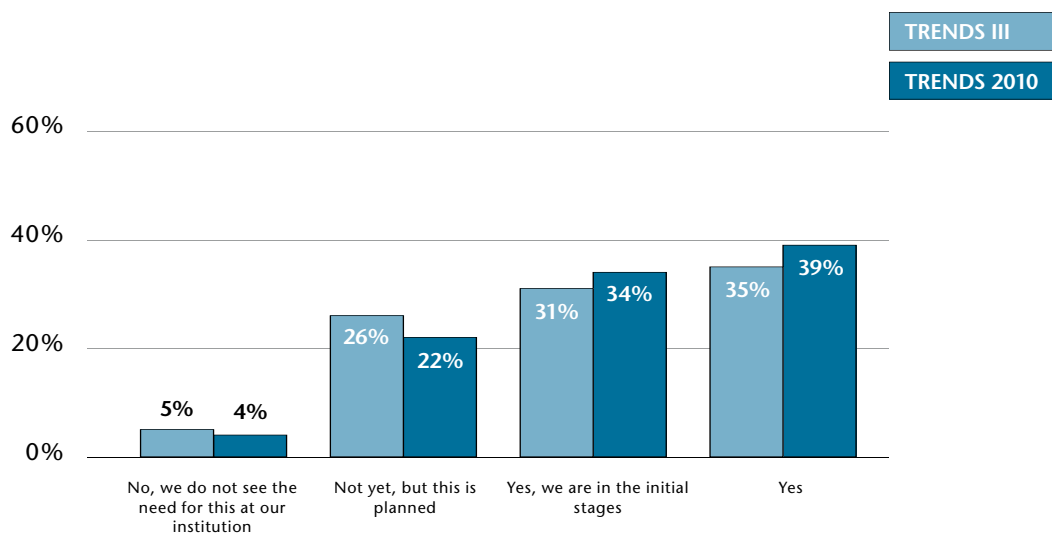
The Bachelor, the Master and the Doctorate can be regarded as a series of possible levels of achievements throughout life, and as seen in Section 2.2, it is at the Master level where significant changes have taken place over the past decade. The diversity of Master level provision is likely to help both create and respond to the diversity of learners.

Lifelong learning has a great diversity of meanings and can be understood in many different ways as reflected in the national rectors’ conferences’ responses to *Trends 2010*. Depending on the institution or the country, it is conceived either as (i) a strategy and a cultural attitude to learning or (ii) a set of different activities unrelated to an overarching concept. Thus, there are generally two different ways in Europe to interpret the concept of lifelong learning:

- The first one views all provision of education in a lifelong perspective and thus includes all formal, informal and non-formal learning (Austria, Hungary, Scotland, Slovakia and Sweden subscribe to this concept).
- The second and most prevailing view regards lifelong learning as ensuring provision of a series of activities: e.g., professional upgrading, continuing education, distance education, university courses for junior, mature and senior learners, preparatory courses, and part-time education to a greater variety of learners.

The *Trends 2010* survey results indicate that the development of institutional lifelong learning strategies that support all educational provision in a lifelong perspective (i.e. the first meaning of the term) evolves very slowly. In *Trends III* (2003), 35% of institutions stated that they had developed an overall lifelong learning strategy. Six years later, there is a negligible increase to 39%.

Table 22. Q41. Has your institution developed an overall strategy regarding Lifelong Learning (LLL) initiatives?



The *Trends 2010* survey looked at which lifelong learning activities were the most prevalent both in general terms and for those HEIs that already have a strategy in place. The results indicate that the interpretation and implementation of the different strands of the Bologna Process vary according to national cultural contexts and understanding of lifelong learning as an overarching concept or as a set of activities, and that this diversity is reflected in how lifelong learning is embedded into institutional strategies. One country that stands out is Sweden, where lifelong learning has been part of the national culture within and outside higher education since the 1970s, so much so that it is often not defined within a strategy, and that a distinction is not always made between courses for traditional or non-traditional learners. No other country has a system with this degree of flexibility and public support for it. Nevertheless, *Trends 2010* data indicate that more than 50% of universities in eight HE systems (CZ, DK, FI, FR, IE, LT, UK-ENWI and UK-SCOT) have a lifelong learning strategy in place. Finland is presently considering how to include lifelong learning in formal educational structures and thus be able to attach credits to lifelong learning activities, as is done in Sweden.

Lifelong learning as an institutional activity can be found in practically all European higher education institutions. For the majority, it is most commonly provided outside of the course offer to young, full-time students. In countries with national lifelong learning strategies, HEIs have typically developed targeted and structured lifelong learning provision (such as professional upgrading, different types of continuing education either offered as face-to-face or distance education). These are found, among others, in Denmark, Finland, Hungary and Portugal (cf. Annex 6).

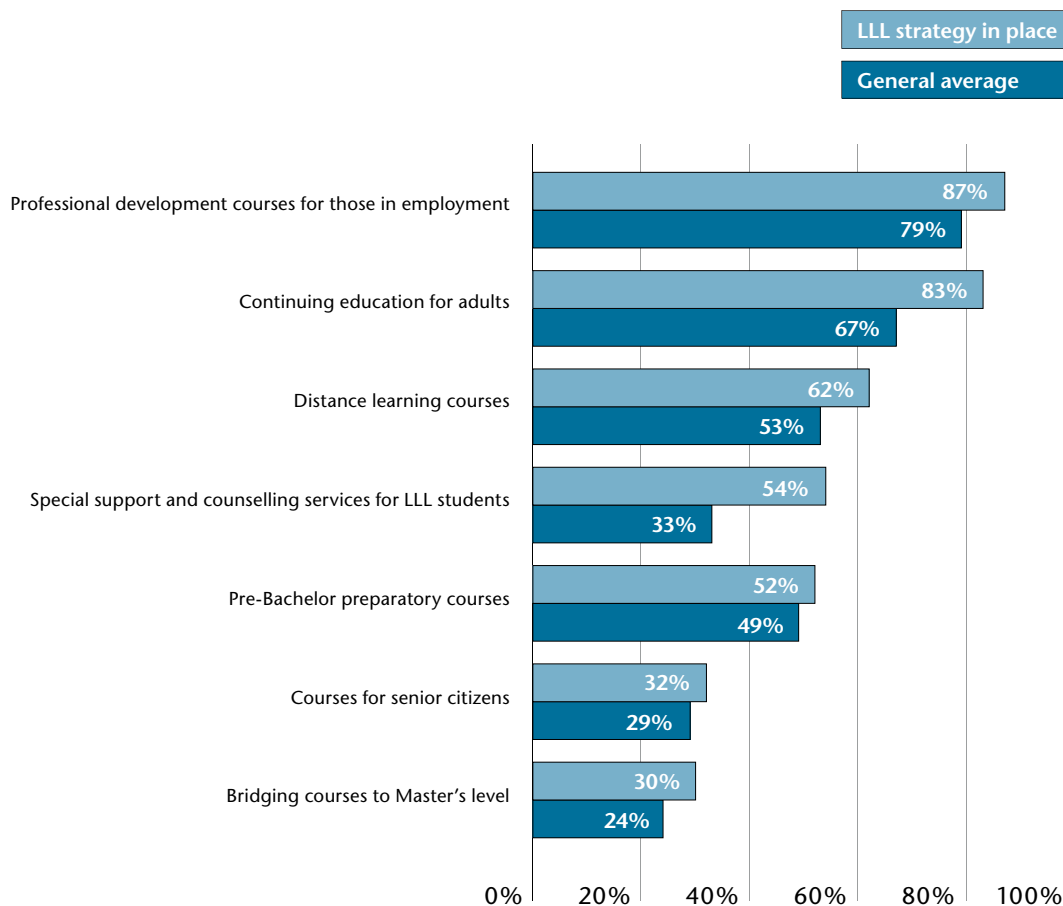
There are, however, national differences in lifelong learning provision, which can be related to the findings of a recent EUA study (EUA 2009b) indicating that the nature of institutional autonomy and governance has a significant influence on the ability to provide courses, programmes and degrees that can be targeted at potential lifelong learners: restrictions can be both financial and linked to the quality assurance requirements set for new types of programmes.

Nevertheless, the large majority of higher education institutions engage in lifelong learning activities, with or without an overarching strategy, as can be seen in Table 23.

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Table 23. Q42. Does your institution offer any of the following?



Thus, *Trends 2010* data revealed that the three main lifelong learning activities are:

- Professional development courses for those in employment
- Continuing education for adults
- Distance learning

Those European HEIs with an overarching strategy in place have a wider portfolio of activities and, crucially, have started to appreciate the importance of developing student services targeted at these specific categories of learners.

The main difference between universities and other types of HEIs is that the former are more likely to offer courses for senior citizens and distance-learning courses and to have

special support and counselling services on offer for lifelong learners, probably reflecting the fact that for other types of HEIs, lifelong learning is more central to their missions and thus do not isolate lifelong learning as a provision.

The *Trends 2010* data made it possible to further identify two types of institutions that are more likely to have an overarching lifelong learning strategy. The first is more likely to be a university, with 15 000 to 30 000 students, and an international profile. 50% of the universities with this profile have indicated that they have a lifelong learning strategy as opposed to the 39% average for the overall sample. The data indicate that this group is also more likely to have a strong research profile.

The second type includes higher education institutions that provide lifelong learning activities, but do not necessarily have an overall strategy in place. They are smaller and more likely to define themselves as having a regional (39%) or national (40%) mission. The site-visit reports confirm that regional universities have a great variety of educational offers for both full-time and part-time students.

Reichert's recent study on institutional diversification (Reichert 2009) supports the *Trends 2010* data and indicates that the not so traditionally embedded functions of higher education institutions are becoming increasingly important in the five countries included in the study (England, France, Norway, Slovakia and Switzerland). Reichert notes that HE representatives believe that two activities will continue to grow in importance in the next five years: continuing professional development (80%) and contribution to business innovation (74%). 68% also believe addressing other societal challenges will become more important as a mission for higher education institutions (Reichert 2009: 125). In addition, Reichert's data indicate that institutions that attach a vital importance to continuing professional development also value research and innovation more highly than on average but that the high value attributed to lifelong learning in missions and strategies is not necessarily shared by academics.

The discrepancy between the institutional level and academics raises the same issue as the introduction of the Bologna Process in general: take-up or success rate depends on strong institutional leadership that values social responsibility, the capacity to engage academics and to align career incentives with the social inclusion agenda.

2.5.2 Increasing and widening participation in higher education

Improving participation rates

The past decade has seen a significant increase in participation rates across most European countries as highlighted by a recent OECD report that also notes the virtual doubling of graduation rates from 18% in 1995 to 36% in 2007 (OECD 2009).

This expansion has taken place at the same time as the implementation of the Bologna reforms in Europe. It can be argued that the Bologna reforms will make it easier for students from both traditional and non-traditional backgrounds to reach the level of educational attainment to which they aspire

by using flexible learning paths. It is also worth underlining that the most significant changes to degree structures have taken place in a number of continental European countries where the traditional university degree was a "one-stop shop", offering a long integrated programme, in principle preparing the student to become either a potential researcher or to take up a specific profession. There were no possibilities to take time out or to finish with a shorter degree. However, although this model was not a particularly attractive or financially viable option for the non-traditional or first-generation higher education student, a recent report shows that the participation rate of non-traditional students does not (yet) support the assumption that the Bologna reforms as such have promoted the diversification of the European student body (Bartušek, 2009).

The Leuven/Louvain-la-Neuve Communiqué (2009) anticipated that HEIs will be catering to a larger and increasingly diverse student population in the future as the size of traditional student cohorts in certain parts of Europe will begin to shrink and economies, responding to globalisation pressures, will demand new skills from the European workforce. Thus the Leuven/Louvain-la-Neuve Communiqué pointed out the need to diversify the European student body by improving access and retention and creating the appropriate conditions to reach these goals:

Access into higher education should be widened by fostering the potential of students from underrepresented groups and by providing adequate conditions for the completion of their studies. This involves improving the learning environment, removing all barriers to study, and creating the appropriate economic conditions for students to be able to benefit from the study opportunities at all levels. (§9)

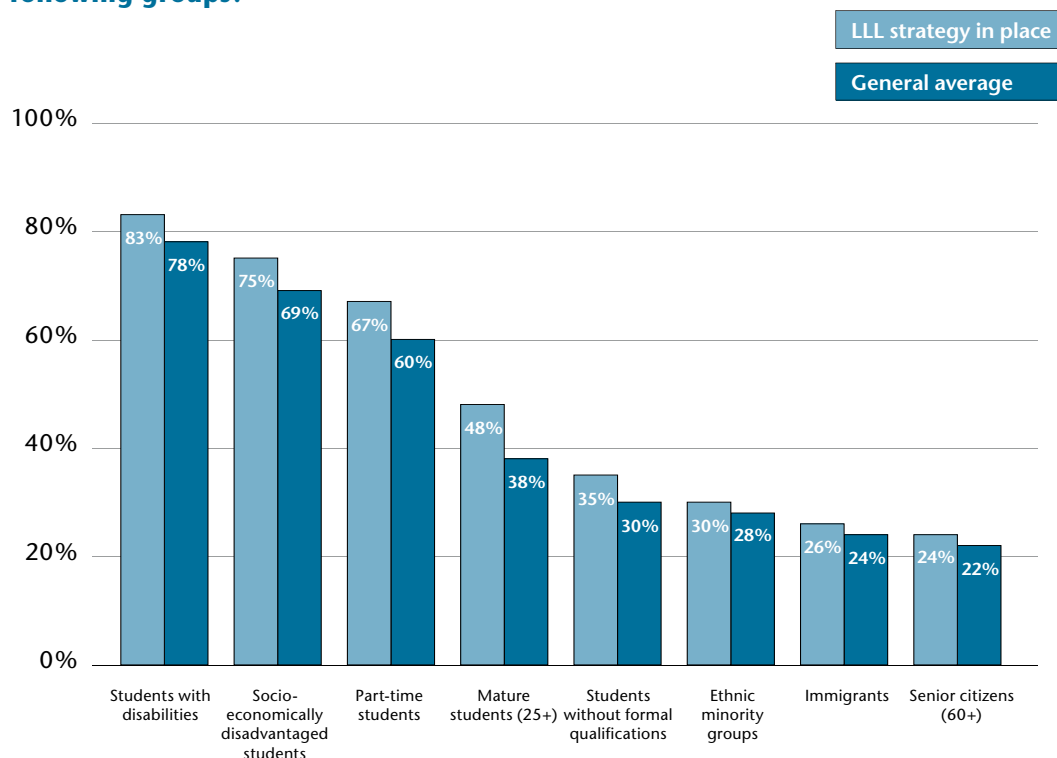
Increasing and widening participation is a priority that has been formulated in a multitude of policy agendas, processes and communiqués, in the Bologna Process, by the EU, OECD, and UNESCO during the past decade. While there has been widespread success in increasing participation, there has been less progress with reaching out to non-traditional or new student groups as was shown in a number of recent reports.

Trends 2010 data show that an increasing number of European HEIs have begun to rise to the challenge of attracting and teaching a more diversified student body, and to introduce institutional policies to address this diversification agenda.

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Table 24. Q43. Do you have special policies in place to address the needs of the following groups?



Trends 2010 data show that nearly 80% of European HEIs have a policy in place when it comes to students with disabilities. Policies for socio-economically disadvantaged students (69%) and part-time students (60%) are in evidence in a significant number of European HEIs. When it comes to ethnic minority groups and immigrants, however, less than 25% of HEIs have introduced specific policies, and the percentage is only slightly more for students without formal qualifications (30%), who, moreover, might require recognition of prior learning (cf. Section 2.3.5). A majority of HEIs in four European HE systems (BE-FL, IE, SE, UK-SCOT) have policies in place for immigrants while the number rises to eight countries for ethnic minority groups. The adoption of institutional policies is closely related to both the overall national social

and economic situation and the existence of national policies or strategies on widening participation and lifelong learning.

Site visits indicate that a number of countries have or will implement further policies for widening participation and, significantly, that one specific target group is that of immigrants and ethnic minorities. Examples were found in the Netherlands, Scotland and Sweden where institutional policies include recruitment, retention and alumni activities to support employability for these groups, and as a way of contributing to the social agenda of these countries. Indeed, in some cases, HEIs have been given the specific mission to promote actively societal integration by being inclusive and responsive.

Increasing and broadening access to higher education

Access is a term that covers multiple issues such as physical accessibility of the institution for students with limited mobility, the availability of higher education regionally, whether primary and secondary education (also) promote widening access, and last but not least a system for student recruitment (or selection) that is able to identify potential students from a variety of backgrounds. Lifelong learning and widening access have been given a high priority in the past decade in European policies, but the question remains at national level as to why significant progress has not been made when it comes to successfully including non-traditional student groups in higher education (cf. Table 24 above).

One important factor is the role that the primary and secondary education system plays in preparing potential students. A recent OECD study indicates that there is a correlation between inclusive primary and secondary school systems and widening participation in higher education (OECD 2008: 2). If the primary and secondary school systems are highly selective, and do not have the proper remedial and support systems in place then it is almost impossible, in spite of free access, for non-traditional groups to reach the level of formal qualifications needed.

A second factor is related to the HE admission systems. There are systems that rely on a centralised system based on grades or tests, in which HEIs have no possibility to choose their students; others where it is possible to select and therefore promote diversity; and still others with open access but with no opportunities to prioritise. Indeed, the EUA Autonomy study (EUA 2009b) confirms that only in few European countries do higher education institutions have the possibility to choose their students directly, as can be seen in Annex 6. Centralised admission systems in a massified or universalised higher education system are formally intended to ensure equal opportunities. In this process, HEIs may lose the opportunity to identify at an early stage students who, for various reasons, might need encouragement and support.

In many countries, however, institutions have developed outreach programmes to encourage potential students. Identification of such students, however, is not enough. HEIs need to build support services that will retain them and prepare them for work in and outside academia. Thus, a third factor

is that it takes considerable investment in individualised support services to ensure that students from disadvantaged social groups do not drop out.

With a fully developed student-centred approach, both traditional and non-traditional students will have greater possibilities to reach their potential thanks to different access modes and flexible learning paths. However, substantial investments will be needed to achieve adequate student-staff ratios and to offer the required staff training and development.

2.5.3 Future challenges

In the majority of European countries, lifelong learning is considered as a set of activities provided outside mainstream education, in relation to which Bologna tools such as learning outcomes and academic credits are only rarely defined or attached. Therefore, there is a clear need for European HEIs and national authorities – together – to connect policies in order to create accessible, flexible and transparent student-centred learning and to monitor and evaluate implementation continuously in order to ensure that all education provision is seen within a lifelong perspective and in specific national, regional, local and institutional contexts. The joint approach advocated in EUA's Lifelong Learning Charter, requiring the joint commitment of national authorities and HEIs, is essential in order to achieve success. It will also be important to act jointly at regional level and promote cooperation between regional stakeholders and HEIs.

To further enhance the development and the potential success of the social dimension of the EHEA it will be vital for both national authorities and HEIs to be able to collect data on the social background of students and their attainment.

From an institutional perspective:

As a strategy, lifelong learning connects and brings coherence to a range of activities, including:

- Formal education as provided in the three-cycle degree structure: initial education for both traditional first-generation students, students from a non-traditional background or mature learners; continuing education through Master degrees, continuing professional development and distance education, and Doctoral education (in full-time or part-time modes).

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- Non-formal education provided outside the three-cycle degree structure such as professional up-grading.
- Informal education: outreach programmes for potential students, children's university, pre-university courses, and post-retirement opportunities for cultural enrichment, etc.

Thus, future challenges for HEIs – that must include, in many cases, consideration of their financial implications – are:

- Opening up a wider range of educational services to new learners and to returning learners
- Creating and implementing coherent institutional strategies in the framework of lifelong learning based on student-centred learning, and flexible and transparent learning paths
- Mainstreaming provision and recognition of lifelong learning, as well as ensuring the quality of provision
- Serving as a role model of lifelong learning institutions by offering lifelong learning possibilities for their own employees – whether they are academic or administrative staff
- Using the change factors of globalisation, technological development and the demographic changes to develop inclusiveness and responsiveness. In other words, seizing upon the changing student population as an opportunity to enrich institutional missions and strengthen the relationship between research, teaching and innovation in a lifelong learning perspective.

From a policy perspective:

- Legal frameworks must ensure the institutional autonomy necessary to enable European HEIs to engage in creating strategies and provision for promoting broader and wider participation in higher education.
- The creation of strategies and possibilities for attracting a diverse student population must be backed by social, legal and economic incentives or support that will promote skills development or up-grading to the benefit of students and employers. The enhanced possibilities and choices must be widely communicated to all stakeholders, especially potential students and employers.
- Policy frameworks should be in place for HEIs to provide a variety of educational offers to potential students in a lifelong learning perspective and, where possible, developed as modules with formal credits.
- A student-centred approach to lifelong learning must be adequately resourced, for instance, to support the development of new teaching methods and course material that are tailored to the needs of learners and employers.

2.6 Internationalisation

When the Sorbonne Declaration was signed, its major objective was to promote European integration and to prepare Europe's higher education to face worldwide challenges. The Bologna Declaration embraced this objective. During the first years of the Bologna Process, the focus was clearly on the development and implementation of reforms that would facilitate European convergence and create the EHEA as a space for cooperation and relationships within a diverse institutional landscape.

Concepts such as globalisation or knowledge-based economies became central to higher education and research policy at about the time that the Bologna Process was launched but, as was pointed out in Part I, tended to be discussed in the context of the Lisbon Strategy. With time, overlapping discussions in the EU and the Bologna context and the growing European Commission support for the Bologna Process as a means of promoting the Modernisation Agenda for universities resulted in the Bologna Process integrating much of the competitiveness discourse of the

Lisbon Strategy and becoming increasingly interested in developing its own global dimension (London Communiqué 2007).

At the same time, the Bologna Process attracted worldwide attention (e.g., Adelman 2008) and changed the image of European higher education “from being regarded as a (rather sclerotic?) collection of traditional but administratively hidebound institutions to being seen as more dynamic, composed of modern and potentially more entrepreneurial institutions” (Scott 2009a: 7). In turn, the international interest in Bologna has increased Europe’s interest in the wider world.

The following sections analyse the results of the *Trends 2010* survey in comparison with previous *Trends* Reports taking account of the changes in focus and activities described below. It is important to point out that given the longitudinal aspect of this study, the specific questions related to mobility and internationalisation were not altered to reflect this change in vocabulary (nor, as will be seen below, the enlargement of the European Union).

2.6.1 Internationalisation strategies

As part of this study, institutions were asked to identify the most important developments that shaped their strategy in the past three years. Of the three receiving the highest value, the Bologna Process comes first (78%), quality assurance reforms (63%) second and internationalisation third (61%) (cf. Table 4, Part I).

When asked about the most important developments in five years time, internationalisation moves to first place (22%), while quality assurance remains in second place (21%) and the Bologna Process moves to third place (15%), as if to indicate that the goals of the Bologna Process have been almost reached.

The site visits have shown that mobility is no longer the single hallmark of internationalisation. Rather, more institutions are developing an integrated internationalisation approach to teaching and research, one that is central to the whole institution rather than the responsibility of an international office managing mobility programmes in relative isolation. The increased importance of institutional profiling impacts on internationalisation through a focus on strategic partnerships and cooperation agreements for teaching, research and capacity building in line with overall institutional priorities even if it is as yet unclear whether this streamlining

will prevail over the more traditional form of ‘bottom up’ cooperation with a broader range of partners.

This development goes hand in hand with a clear trend of the past few years towards the creation of relatively small networks of like-minded institutions searching for ways to collaborate and to benchmark their activities. Memberships in these networks have become status markers, as institutions seek to increase their competitive edge and prestige through such affiliations. The trend toward institutional mergers and inter-institutional cooperation (cf. Part I) is often also driven by the need to increase international visibility through greater critical mass.

Finally, there is an increase in a range of cross-border activities, often grouped together under the heading of ‘Transnational Education’ (TNE), which were discussed during a recent EUA conference (EUA 2009e). These discussions concluded that, although initially regarded by the wider academic community partly as mainly profit-driven and often hazardous enterprises, they have now gained widespread acceptance. It is likely that the different types and models that have emerged – including joint programmes, branch campuses or common international research competence centres – will further diversify, as institutions make intentional choices and place these transnational activities firmly in the context of their international strategies. The evermore sophisticated and widespread use of information and communication technologies is likely to benefit these activities in adding a virtual mobility component to physical mobility.

Given the high costs of such transnational activity, the danger of commercialisation prevails. While one of the declared purposes is capacity building, most transnational initiatives target countries and regions from the point of view of their purchasing power rather than HE development needs. In some cases, the provision of public funding for such activities (funding that reflect national priorities) diminishes the financial risk for institutions.

In addition to national funding, European funding streams have supported these new developments. While the EC’s Erasmus Mundus Programme has contributed to the development of international joint study programmes, no European dimension has yet emerged regarding the creation of off-shore campuses, which, on the contrary, in many cases reflects national priorities.

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Priority areas for international exchange

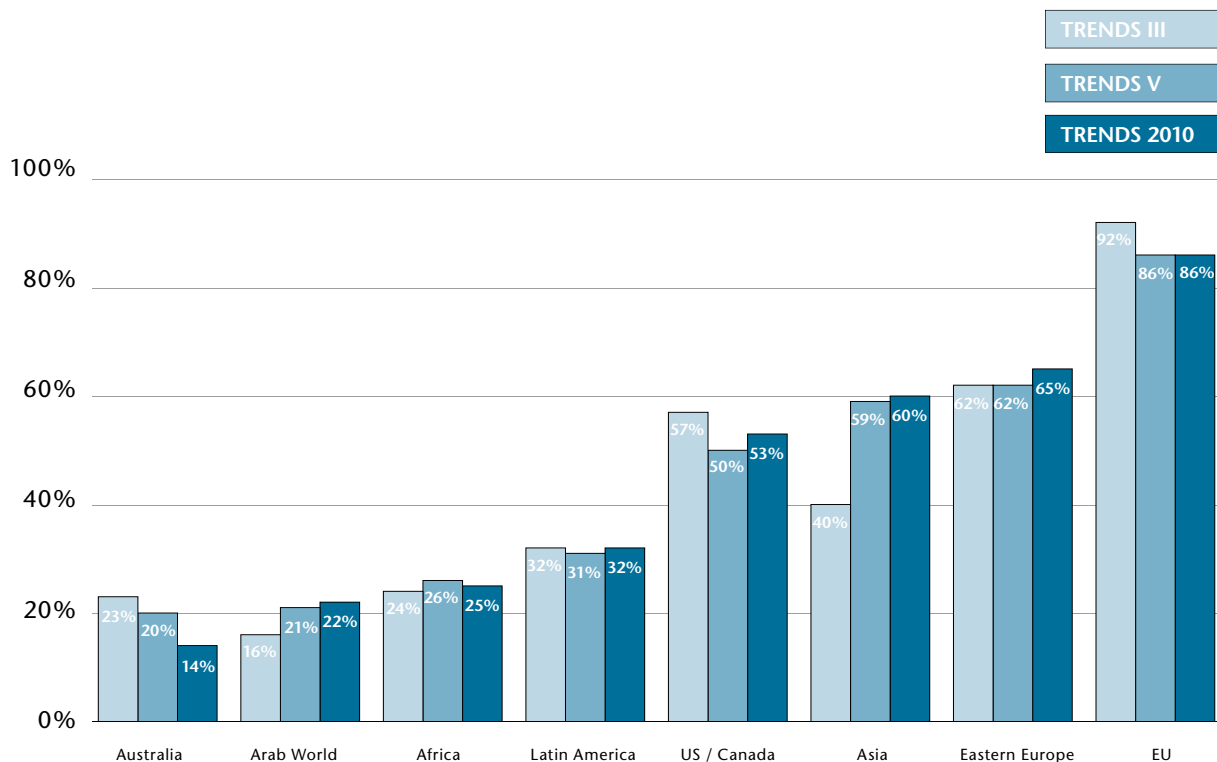
The priority geographical areas for international exchange have not changed much between *Trends V* and *Trends 2010*:

- The EU remains the first choice by a margin of 21%. Eastern Europe remains the second priority, although, as in *Trends V*, it is mentioned least frequently by institutions in Spain, Sweden and Switzerland. This group is now joined by Ireland.
- Asia keeps its third place. Institutions in Hungary, Lithuania and the Netherlands seem to have lost their significant appetite for Asia, while over

70% of institutions in Finland, France, the UK and Switzerland continue to cite it as a priority. Armenia, Austria, Iceland, Ireland, Latvia, Slovakia and Sweden have joined this group as well.

- The US and Canada maintain their fourth place and Latin America the fifth.
- The Arab world and Africa remain the lowest priority areas for higher education institutions across Europe, followed by Australia which has been losing ground since 2003.

Table 25. Q53. In which geographical areas would your institution most like to enhance its international attractiveness?



As in *Trends V*, universities (as opposed to other types of institutions) are still considerably more likely to list the US/Canada, Asia, Latin America and the Arab world as priorities. Other types of HEIs are focused primarily on EU (87%) and Eastern Europe (57%), followed by Asia (49%) and US/Canada (42%).

The geographical targets are changing slightly and reflect the desire to explore new links, beyond the historical and cultural connections that have been maintained, sometimes over centuries. These new links are promoted primarily by national funding incentives (with some European support) and connected to the increased attraction of emerging countries, particularly in Asia.

2.6.2 Mobility

Student mobility has been one of the stated goals of the Bologna Declaration and the Bologna Process. More recently, increased emphasis has been laid on enhancing the mobility of academic staff.

Mobility is viewed as crucial to meeting the European goals of the EHEA and the ERA as one of the mechanisms that can promote a European identity, enhance the education and personal development goals of individuals, support the creation of a single market, and stimulate new approaches in research through enhanced critical mass.

Initially, intra-European mobility was the focus of attention. Recently, as thinking on the global dimension of the Bologna Process has developed, there has been more discussion of also promoting mobility into and out of Europe. These discussions should be seen in the context of the overall growth in international student mobility in recent years.

Several European Commission schemes have supported these goals, including the Erasmus Programme for intra-EU mobility, the Tempus Programme for funding within certain European but non-EU countries as well as partner countries neighbouring the EU (e.g. North Africa) and Erasmus Mundus for mobility outside Europe. These developments mean that some institutions no longer distinguish between 'European' and 'International' mobility, but refer to and thus indentify all mobility as international activity, and as part of an overall international strategy.

In the preparation of the 2009 Bologna ministerial meeting there was a strong focus on the need to take concrete steps to improve mobility over the next decade. The Leuven/Louvain-la-Neuve Communiqué describes the importance of mobility and sets a benchmark figure of 20% for 2020. Similarly, a recent ERAB report sets a mobility target of "20% of doctoral candidates working outside of their home countries" for the same period, representing a tripling of current figures (EU 2009c: 13).

Despite the efforts to promote mobility, there are little sound data available on mobility flows and, thus, on the extent to which mobility has progressed over the years. Because of the difficulties with data collection in this area, which were already identified in *Trends V*, the mobility section below is restricted to responses received on a limited set of questions and the site-visit reports.

Student mobility

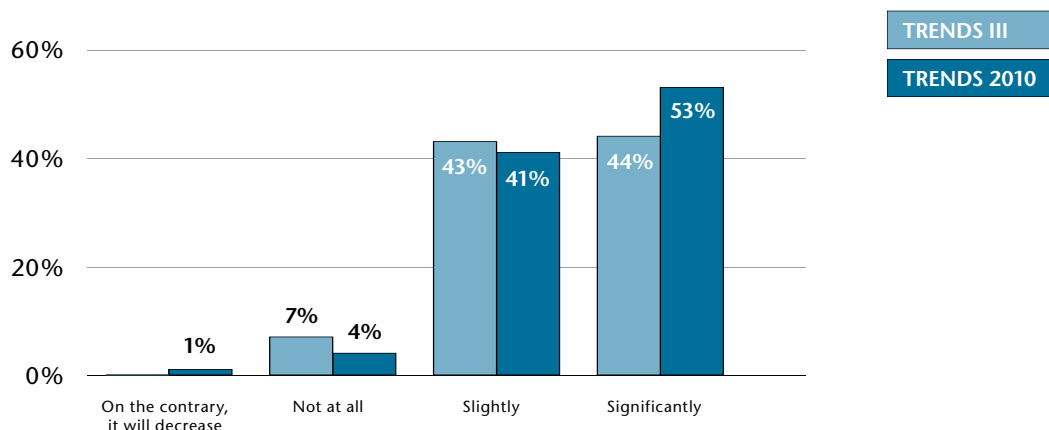
There are two main types of student mobility: study abroad periods during a degree (short-term or horizontal mobility) and transfer to another institution after earning a degree (full-degree or vertical mobility).

Full-degree mobility data was elicited through a question related to expectations. Table 26 below shows that 53% of institutions (as opposed to 44% in *Trends III*), mostly from smaller countries, expect that the three-cycle structure provides significant more opportunities for full-degree (vertical) mobility.

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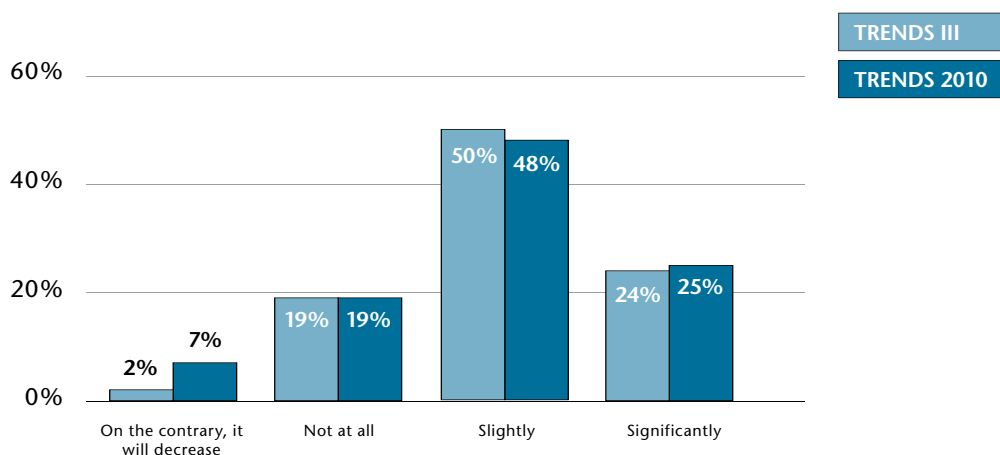
Table 26. Q37. Do you expect that the three-cycle structure provides more opportunities for students to move from one institution to another for the next cycle of study - e.g. from Bachelor to Master (vertical mobility)?



The recent Commission working document on “Progress towards the Lisbon objectives in education and training” indicates that students have significantly altered their full-degree mobility in some countries, including Bulgaria, Estonia, Germany, Portugal and Slovakia (EU 2009a).

When it comes to expectations of short-term mobility, there is some evidence from the responses to the *Trends 2010* survey that they may have been slightly reduced by the introduction of the Bachelor/Master structure, although the difference between *Trends III* and *Trends 2010* data are within the margin of error.

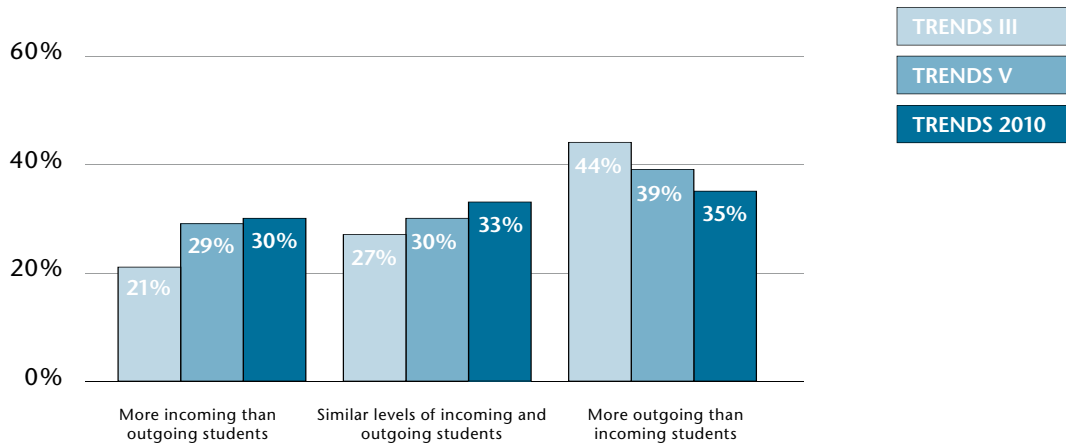
Table 27. Q36. Do you expect that the three-cycle degree structure provides more opportunities for students to move from one faculty or institution to another within a degree cycle (horizontal mobility)?



Concerning student flows, HEIs were asked to compare the balance between incoming and outgoing students. Their responses, shown in Table 28 below, are probably based on structured mobility data (e.g. ERASMUS

students) rather than data about ‘free movers’. The limited data available seem to indicate that the three categories of HEIs are converging towards three equal thirds.

Table 28. Q34. Comparing incoming and outgoing student mobility, what is the balance?



Furthermore, the following three maps, which also probably track short-term structured mobility (the most reliable data collected by HEIs), show that when the data are analysed by country, there is little change to the 'importers' and the 'exporters', although a few more countries are joining the 'importer' group but without altering the historical imbalance between eastern and western Europe.

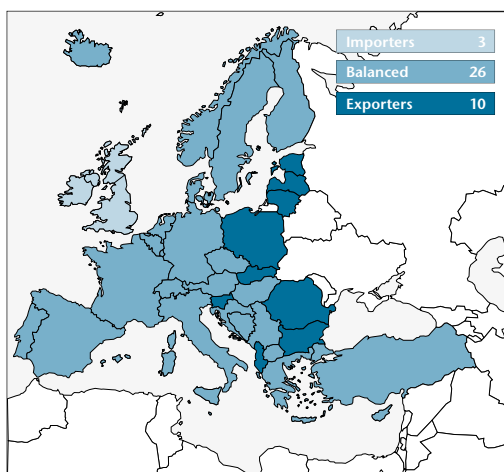
In addition, recent EU data show that there is a growing influx of international students to Europe, particularly from Africa and Asia. The main importers in 2007 were Austria, Belgium, Denmark, France, Germany, Sweden and the UK. The largest change has taken place in the UK where the number of non-EU students rose from 11% in 2000 to 31% in 2007 (EU 2009a).

Tentative conclusions can be drawn from these data. First, institutional expectations regarding short-term mobility seem to have remained stable, and this provides a context for understanding mobility trends. Second, there are increased expectations for full-degree or vertical mobility. Third, mobility flows show the same imbalance between east and west, with little change since *Trends III*. Fourth, there seems to be an increased influx of international students into Europe as shown by Eurostat data, albeit these are difficult to measure because they include resident immigrants with foreign passports. Thus the overall increase of international student flows to Europe might reflect in part the greater access of resident immigrants to higher education.

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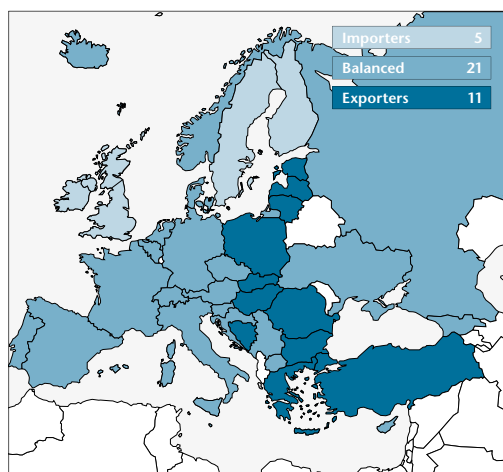
Map 11 — Trends III (2003)

Comparing students flows by largest group of respondents



Map 12 — Trends V (2007)

Comparing students flows by largest group of respondents



Map 13 — Trends 2010 (2010)

Comparing students flows by largest group of respondents

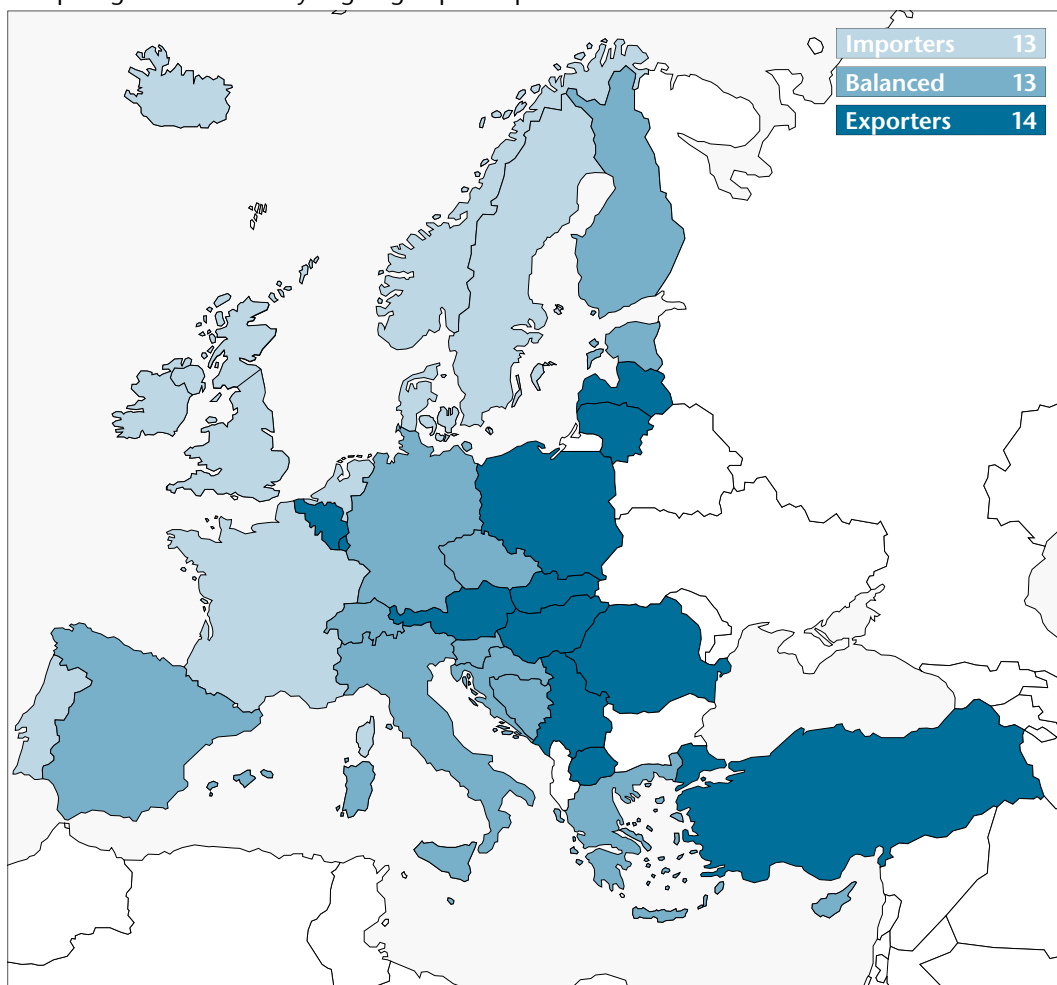
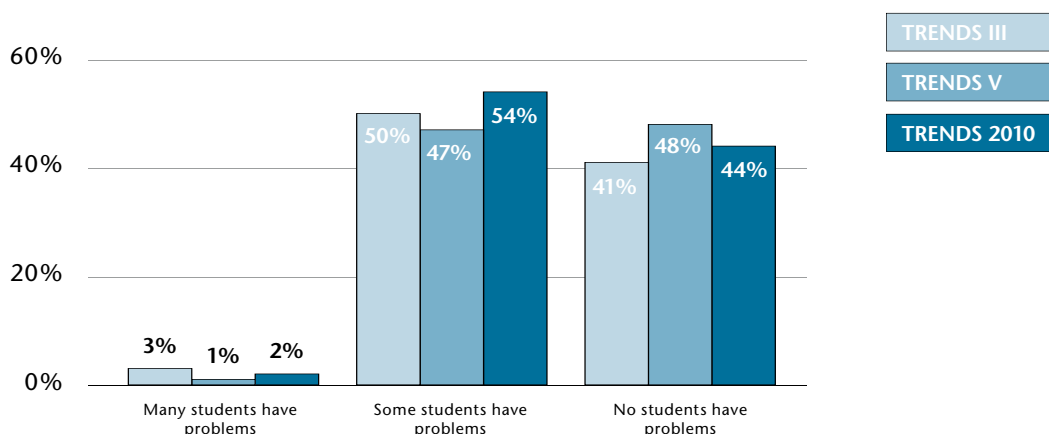


Table 29. Q28. Do students returning to your institution from study abroad encounter problems with the recognition of their credits?



Recognition of study abroad

Data collected on how institutions organise the recognition of study abroad periods are coherent with the unchanged institutions' expectations regarding short-term mobility. Problems with the recognition of credits obtained after a short-term mobility seem to have fluctuated insignificantly over time despite this having been one of the original objectives for the Bologna Process. In *Trends III*, 41% of institutions said that none of their students had problems; the figure in *Trends V* went up to 48%; in *Trends 2010*, the figure has dropped down to 44% (cf. Table 29 above).

A close examination of the responses to the recognition of study abroad periods reveals that:

- In universities, study abroad periods are most often recognised at the faculty level, while recognition of degrees takes place in the central office. Although the other types of higher education institutions also seem to depend on a central office, they turn also to the faculties and the departments to handle this caseload.
- The centralised way of handling recognition issues seems to be preferred by the smallest institutions especially, while the mid-size and large institutions are more likely to favour the faculty (and departmental) level.
- Institutions with a local focus are clearly in favour of the departmental level, while institutions with a European focus are most likely to prefer a central office.
- The older the institution, the more likely it is that the recognition may take place at faculty level; the younger the institutions, the more likely it is to take place at departmental level.
- Unsurprisingly, the larger the institution,

the more likely it is that its students have some problems with the recognition of their credits obtained abroad. While 63% of small institutions stated that none of their students has problems with the recognition of credits earned abroad, the corresponding figure for the largest universities was only 26%. Whether the institution has balanced or imbalanced mobility between outgoing and incoming students makes no difference to the level of recognition problems.

Most interestingly, however, and of importance to institutional management, the more centralised the recognition of the period of study abroad is, the more likely students will not encounter problems with the recognition of transfer credits probably because centralisation provides a consistent and coherent way of dealing with credit transfer.

As discussed in previous sections the main recognition and 'transparency' tools that should facilitate mobility (Lisbon Convention, ENIC/NARIC, ECTS and Diploma Supplement) are increasingly being used by institutions. There remain, however, persistent obstacles to staff and student mobility (both short-term and full-degree), which emerged from the *Trends* site visits in particular from discussions with academic staff and students. These include:

- Lack of understanding or awareness of the Lisbon Recognition Convention (see 2.4.3) on the part of some academics who hold the view that students' study periods abroad must correspond strictly to what they would have done at home.
- Lack of support by academics for a central office that would process study abroad periods with the associated belief that recognition should rest with individual teachers, departments or faculties.

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- Learning agreements viewed as a burden on academics and not always respected when students come back. They can also be a burden for students, some of whom report that they have to turn to each of their professors individually to confirm their agreement.
- Delays in implementing the full Bologna tool kit, weak understanding some of the tools or not exploiting their interlinkages fully. Thus, the intensity of the shorter Bologna Bachelor is often given as the explanation for not building a mobility period into the curricular requirements. In fact, this may reflect insufficient modularisation or the high number of examinations, which keep students at home; a 'stay-at-home' culture of both students and academic staff; or a lack of an internationalised culture in the institution.
- Some resistance to encouraging outgoing student mobility is in evidence and seems to be linked to concerns that they will not come back.
- The perceived growing competition within the sector is mentioned as leading each institution to try to be unique or different thus creating further obstacles to recognition. This is most evident at the Master level.
- Lack of harmonisation in Europe with respect to the academic calendar, the marking system, the different ways in which ECTS are calculated, or the different length of degrees allowed in Bologna: 3+2 (the majority of countries) or 4+1 for the Bachelor and Master. Thus, in the minority of institutions that have had to implement the 4+1 degree structure, those responsible for international affairs and the students, questioned how to organise mobility at the Master level when its duration is only one year and how to process admission to the Master level of international students with three-year Bachelor degrees.
- Poor language skills of outgoing students or national language policies that limit teaching in non-national languages or require administering examinations in the national language, thus limiting the number of incoming students.

- Limited funding for outgoing students and incoming EU students considered to be a financial burden on the institution.
- Part-time work or family obligations.
- Visa requirements for non-EU students.

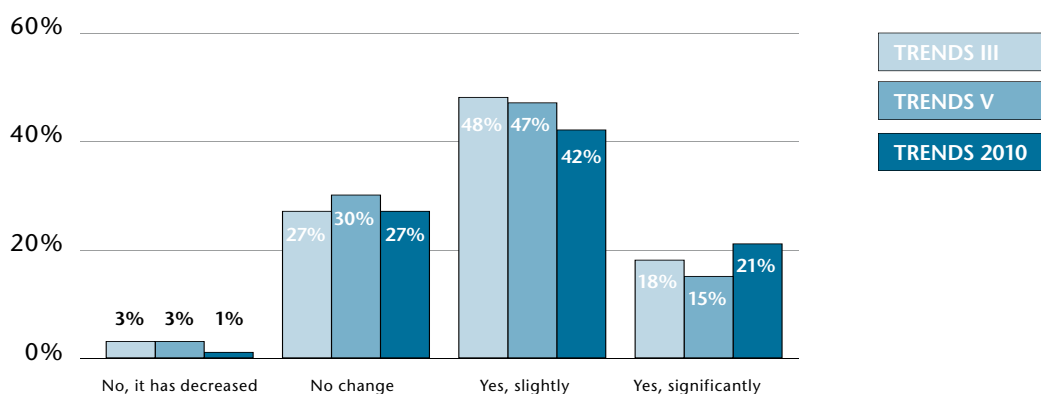
This long list of obstacles does not apply to all institutions and it may very well be that the trend is toward full-degree mobility at the expense of short-term mobility. This is particularly evident at the Doctoral level where international enrolments seem to be relatively more important.

It is also essential to remember that, despite the reported problems, internationalisation is very central to many institutional strategies: 31% see it as a way to develop their academic activities and 28% as a means to enhance reputation and visibility. Common elements of institutional strategies include developing educational or research alliances, maintaining membership in networks and associations, offering stand-alone courses and support services to international students, teaching in non-national languages, promoting staff and student mobility through improved information or financial support, requiring periods of mobility as part of curricula, improving language teaching, fully implementing student-centred learning and the Bologna tools, particularly ECTS and the Diploma Supplement.

Staff mobility

Staff mobility shows a steady, albeit small increase: 21% of respondents say it has increased significantly as compared to 15% in *Trends V* and 18% in *Trends III*. These are institutions in Latvia and Lithuania (50%), followed by Serbia and Turkey (40%), Romania (39%), Poland (35%), and Bosnia-Herzegovina and Italy (33%). (This list includes only countries where 30% or more institutions responded that staff mobility has increased "significantly".) The number of those answering that it has increased "slightly" has dropped steadily from *Trends III* and *V*. Overall, 23% of universities and 15% of other types of HEIs have indicated that staff mobility has grown significantly.

Table 30. Q35. Has teaching staff mobility increased at your institution over the last three years?



Some of the site visit reports relay that academic staff complain of heavy teaching loads and difficulties in finding a substitute for their own mobility period.

2.6.3 Future Challenges

Beyond the differences in organising the recognition of studies abroad in institutions and promoting staff mobility, a less quantifiable but probably more important dimension to mobility is the centrality of internationalisation in an institutional strategy. In other words, in addition to specific issues, such as the organisation of recognition procedures or the promotion of staff and student mobility, mobility needs to be reconsidered a key element of institutional internationalisation policies and all the issues around it addressed in this light. The growing emphasis on internationalisation should be reflected in specific strategies and actions to promote student and staff mobility in the future and to make significant progress in removing the many different obstacles identified in the Section on “Recognition of study abroad” above.

From an institutional perspective, awareness of the tools that facilitate mobility are on the rise within institutions (Lisbon Convention, relationship with the ENIC/NARIC) and mobility levels might improve through a combination of actions, such as defining learning outcomes, improving the use of ECTS, ensuring the quality of Diploma Supplements and their international understanding, and providing financial support to mobile students. However, mobility, particularly as a

period of study abroad during the Bachelor, remains a challenge, unless it is central to the institutional internationalisation strategy. Thus, having an overall policy target of 20% mobility across Europe does not mean that each institution should achieve this goal: mobility must fit each institution’s mission and profile and meet the educational and personal goals of each individual learner.

Promoting mobility and removing the many obstacles identified remains a challenge for policy makers and institutional leaders alike.

From an institutional perspective:

- Institutions should develop a strategy that defines the scope of their internationalisation orientation, and develop educational and research activities accordingly. This includes the identification of targets for short-term and full-degree mobility, the geographical target areas, target numbers of mobile students at each degree level, the types of cooperation that fit their overall needs, and the specific HE networks of which they are part. These strategic goals must be aligned with appropriate language teaching provision, manageable numbers of quality-assured joint degrees, the number of programmes with integrated mobility periods, support for outgoing students/young researchers and international students/young researchers (especially administrative support and housing), and guidelines on integrating international students/researchers/staff in classrooms and on campus, thus ensuring internationalisation at home.

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- Institutions should map existing mobility activities in order to understand better mobility patterns and promote, if desired, further growth in these initiatives.
 - Institutions should create a central recognition unit, to support effective and coherent recognition of study abroad periods and foreign degrees, including also other types of recognition such as formal and informal learning, and locate this unit within the student service functions.
- From a policy perspective:**
- There is a need to develop more precise definitions and measurements of mobility in order to correct the flaws of some current measurements, which, for example, sometimes count the same student several times.
 - It is critically important to promote mobility by improving and targeting information, aligning, where possible, national policies, and taking appropriate European action to address long-standing problems such as visa requirements, promoting the portability of pension provision for researchers, study grants and loans for students, etc., both for EU citizens and international students, staff and researchers.
 - Academic calendars need to be coordinated at European level in order to facilitate short-term mobility.

2.7 Conditions for proper institutional implementation: student services and internal quality

Section 2.7 considers two important developments – student services and internal quality – that underpin the quality of the learning experience, particularly in times of institutional change and are the basic building blocks that can support the shift to student-centred learning. Indeed, internal quality, as reflected in particular in good institutional data collection and analysis, allows institutions to monitor their activities as well as student attainment, thus contributing to further development of student services that fit the particular needs identified.

2.7.1 Student services

The importance of student services in European HEIs has been relatively ignored by policy makers throughout the Bologna decade even although it is essential for communicating the benefits of the reforms to potential and current students, guiding them in constructing more flexible study paths, succeeding in attaining their learning goals and supporting their entry into the labour market. The need for enhanced and

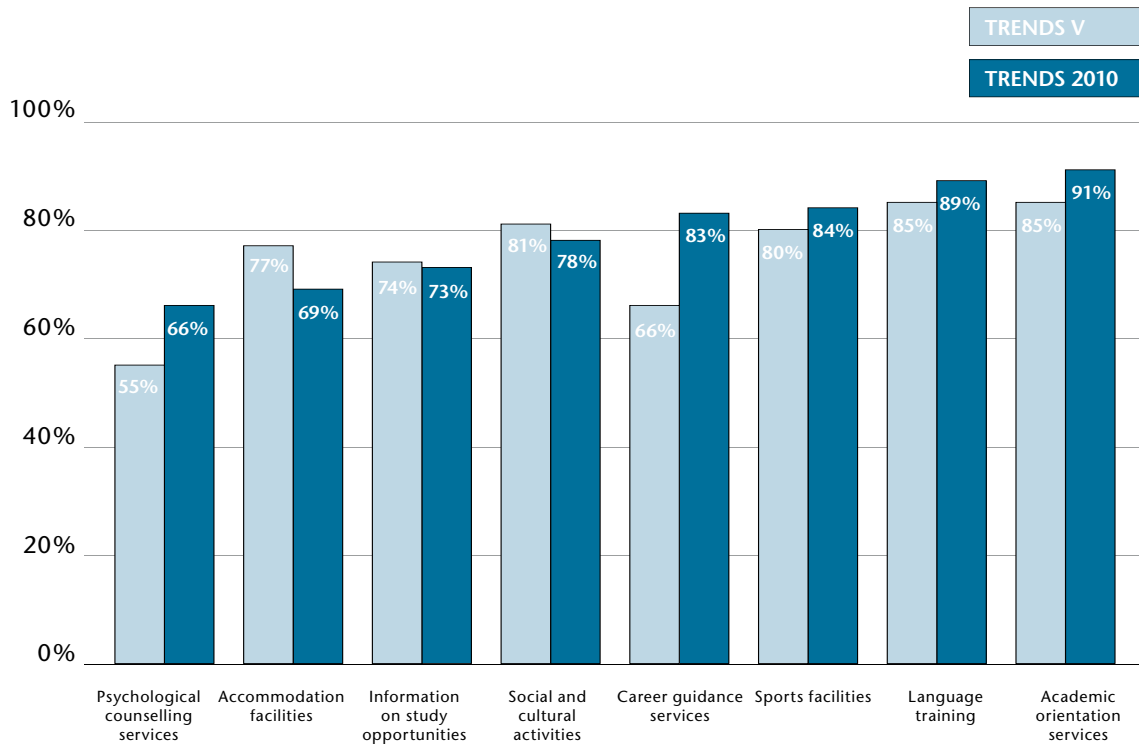
targeted student services is particularly crucial with both the increased diversity in higher education provision and in the student population. Indeed, the make-up of the student body includes today full- and part-time learners; ethnic minorities and immigrants; national and international students; young, mature and older students; students with physical or learning disabilities, etc.

Trends V emphasised that:

The value of student support services needs to be better recognised, supported and developed in the interest of all students. In particular guidance and counselling services play a key role in widening access, improving completion rates and in preparing students for the labour market (EUA 2007: 52)

The questions in *Trends 2010* related to this area encompass the traditional student services: academic orientation, accommodation, career guidance, psychological counselling, sports facilities, information on study opportunities, language training, and social and cultural activities.

Table 31. Q11. Which of these services does your institution provide for its students?



The *Trends 2010* data seem to point to a steady growth in the provision of student services, with perhaps the exception of housing. A focus group meeting with FEDORA (European Forum for Student Guidance), however, indicated that the recognition of the importance of student guidance and counselling services has not really improved whether examined within a three- or ten-year perspective. A recent FEDORA report reveals that the provision of student services within the European HEIs has yet to develop a distinct role or identity within the higher education landscape (Karzensteiner *et al* 2008: 336) – a conclusion that supports the perception that while the Bologna Process has encouraged personalised study paths and diversification of the student body through greater access, the issue of student services that is so crucial to student success has been relatively neglected.

One reason for the discrepancies between the Trends data and the FEDORA discussion could be that there is a lack of consensus on what to include in student services. In some institutions, student services tend to be limited to the academic part of student life whereas other institutions and the students themselves tend to hold a more holistic view

and include childcare, medical and social services. These differences must also be related to how student services are organised nationally, since some countries provide a range of specific student support services centrally (such as, housing, restaurants, health care, etc.) that are the responsibilities of national or local authorities or student organisations.

The challenge then is to create a clear division of responsibilities between the institution, the student organisations, local and national service providers and to ensure coordination. Coordination is particularly important for three main reasons: to ensure that no gaps in provision are left; to increase efficiency through reducing work duplication, particularly concerning information material; to simplify the process for students and avoid sending them from office to office in search of the right service provider.

The *Trends 2010* questionnaire data and the site-visit reports suggest that career guidance is the fastest growing area. Career guidance grew from 66% to 83% between 2007 and 2009, which represents a +17% growth or a 25% improvement since 2007. This finding supports the emphasis on employability

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in the Bologna Process and represents a real change in attitudes. This is followed by growth in psychological counselling services from 55% to 66% between 2007 and 2009, representing a +11% growth or a 20% improvement since 2007, which may be pointing to a trend towards more holistic views of student services and an understanding that students' success is predicated on a wider range of factors than just the academic ones.

In addition, the discussion with FEDORA and the *Trends 2010* site-visit reports seems to indicate that the focus is moving, to a certain extent, from providing student guidance primarily during the pre-admission phase to improving student retention and preparing students for employment.

However, *Trends 2010* data are not detailed enough to show if the provision of student services caters to a diversified student body. Certain correlations indicate that the focus of provision is changing. One example can be found in Table 23 that indicates that 54% of the institutions that have a strategy in place for lifelong learning also have special support and counselling services for LLL students, as opposed to the general average where only 33% offer this service. Furthermore, when it comes to part-time students and socio-economically disadvantaged students there is a significant correlation between institutional mission and activities: unsurprisingly, more than 65% of institutions that have services in place also have policies to address the needs of these two groups. Given the specific requirements of this very mixed group of students, some of whom rely on recognition of their prior learning, it can be concluded that European HEIs have not yet met the challenges of being inclusive and responsive in any coherent way.

The introduction of internal quality assurance arrangements has been uneven, as will be seen below, and this is especially true when it comes to the evaluation of student learning services (Table 34). The figure remains stable with 43% of HEIs, in both *Trends V* and *Trends 2010*, evaluating these functions.

Finally, students' participation in senates and councils continues to be strong (91% of HEIs), thus signalling the importance accorded to them. There is some evidence to suggest, however, that the recent governance reforms have led to smaller deliberative bodies, thus affecting student representation, although they are increasingly involved in quality processes.

2.7.2 Internal quality processes

Quality and the global attractiveness and competitiveness of European higher education have been central goals of the Bologna Process and the Lisbon strategy. As discussed earlier, the Berlin Communiqué (2003) recognised the primary role of higher education institutions in monitoring quality, following the launch of the EUA Quality Culture project (EUA 2006). Since then a great deal of effort has been exerted to develop internal quality processes and the higher education community has seized upon the Bologna agenda as an opportunity for improving teaching and learning. Like with the other elements of the Bologna reforms, there has been progress in developing formal quality arrangements.

Thus, institutional responses to the *Trends 2010* questionnaire revealed that for 60% of HEIs, one of the most important changes in the past ten years has been enhanced internal quality processes. It is worth noting that 53% of HEIs indicated that enhanced cooperation with other higher education institutions has been an important change as well. The following two tables (32 and 33) clearly demonstrate how important internal quality processes are to inter-institutional cooperation. Indeed, institutions with a European focus are most likely to evaluate both teaching and research activities regularly. This correlation was confirmed by the site visits.

Table 32. Q44-47. Types of regular internal evaluation of teaching and institutional focus

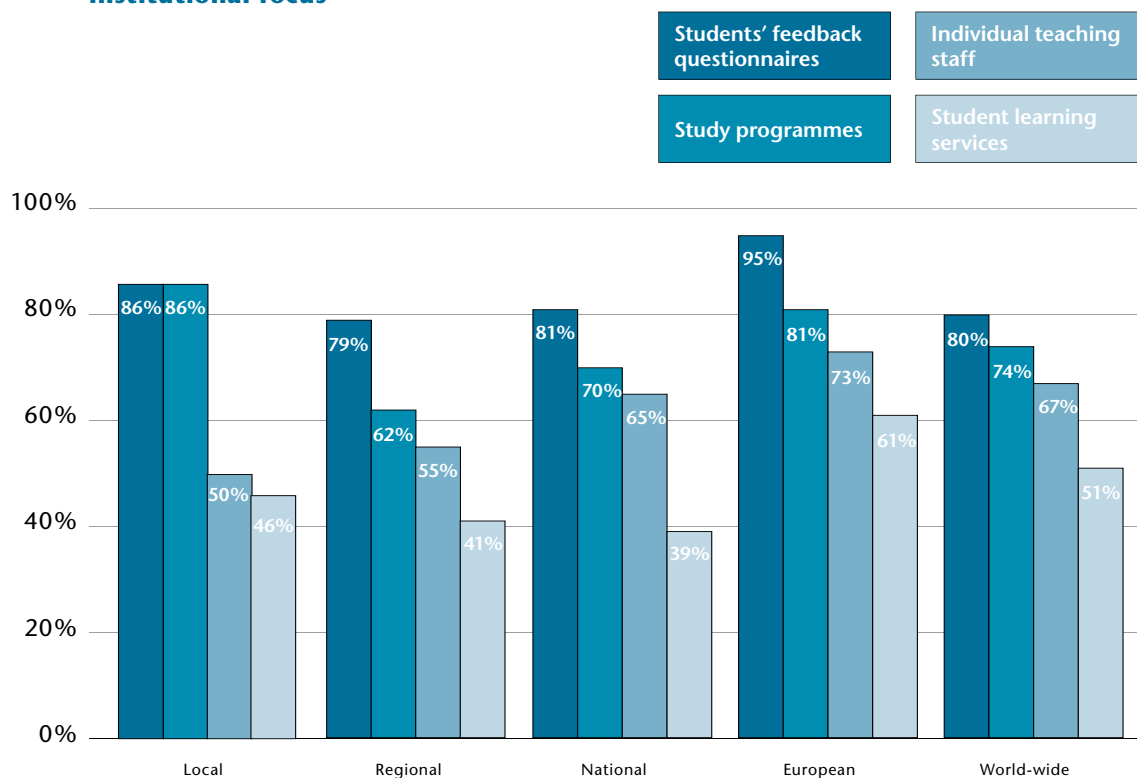
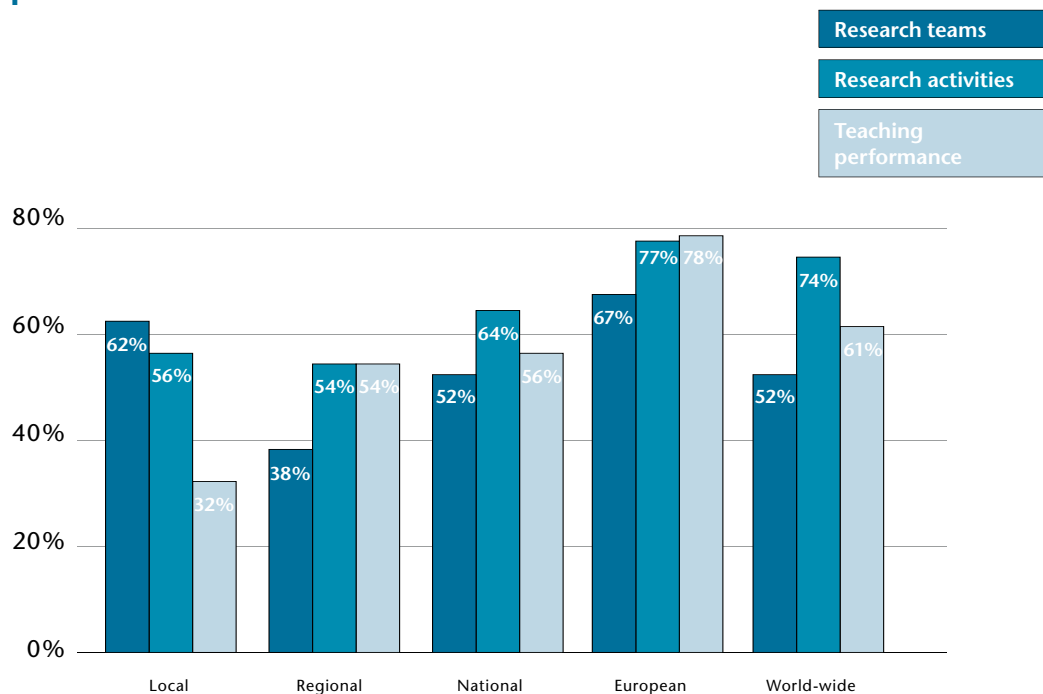


Table 33. Q48-50. Types of regular internal evaluation of research and teaching performance and institutional focus



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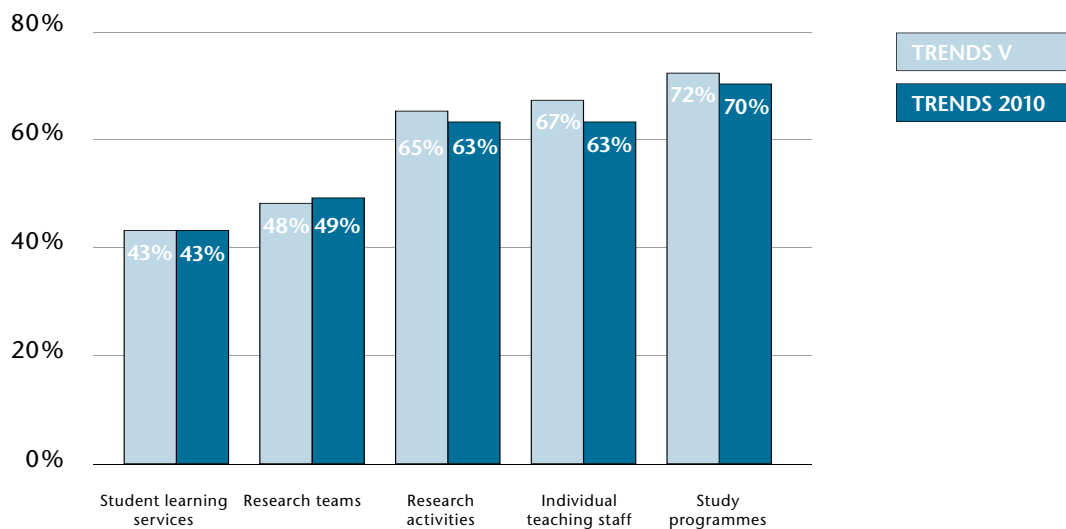
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Changes to the Doctoral level have led to more attention being paid by institutions to quality issues and on the appropriate measures that institutions should be taking in order to monitor the quality of their doctoral programmes effectively. The evidence collected from the work of EUA's Council for Doctoral Education shows that some of the elements of internal quality assurance presently being implemented – even if they are not explicitly identified as such – include: the introduction of new supervision models and professional development for supervisors; the development of internal regulations and codes of practice as well as agreements signed between the Doctoral candidate, the supervisor and the institution; improvements in standards of access, recruitment and selection; regular monitoring of each Doctoral candidate's progress, including procedures for monitoring TTD (time to degree) and completion rates and

for tracking Doctoral graduates; and ensuring high standards of the process of the thesis defence.

Despite the high number of institutions (60%) reporting enhanced quality activities, however, the longitudinal analysis shows little change since *Trends V* (2007). Regular evaluations of student learning services are still rather low (43%), while study programmes, teaching staff and research activities are evaluated most frequently. However, even when good teaching evaluations are emphasised in academic promotion, research productivity tends to be given more weight. In addition, quantitative evaluation methods often 'measure what is measurable', thus making it is hard to bring out the full quality of teaching.

Tabel 34. Q45-49. Regular internal evaluation of HEIs: TRENDS V & 2010



Finally, as seen in Section 2.2, relatively few institutions track their first graduates and thus miss the opportunity to get feedback on the quality of their education and improve their curricula accordingly.

These figures, however, do not capture the full story. The institutional site visits provide a more granular view of the data. They confirm that many quality procedures are in place, often managed at faculty rather than at institutional level. As a result, there is wider ownership of quality processes and the concept of quality culture is reaching down but there is not always a clear feedback loop to the institution's strategic orientation. In addition, while staff development measures to improve teaching are in place in many institutions, these are not found everywhere.

Furthermore, in some institutions, one lone staff member is in charge of internal quality processes and it appears that students feel intimidated in serving on quality boards in some institutions. Staff involvement in internal quality – even in the administration of student questionnaires – is still too often based on the individual interest of academic staff. In some institutions, a number of academics feel they should be above evaluation: particularly, mid-ranked academics in some countries complain that students are not in a position to assess teaching and teacher quality. They state that a 'complaint culture' is developing and do not express any real understanding of the importance of student participation in quality assurance processes. Academics are also often caught between two incoherent policies: to change to a student-centred learning approach and to be evaluated on the basis of their research performance.

As noted in Section 2.4.4, there seems to be relatively little awareness of the ESGs in institutions. The main concern of some institutions seems to be to respond to national quality assurance demands. This is particularly true when no national discussion of the ESGs has taken place or if the QA agency does not make an explicit link between its requirements and the ESGs. Others institutions have embarked on implementing schemes – such as ISO – with no awareness of the need to have an approach that is more holistic and academic – i.e., one that addresses the various components that ensure the quality of degree awards such as national qualifications frameworks and learning outcomes.

In short, while good progress has been achieved, internal quality needs to be

approached in a more integrated and comprehensive fashion and take into account the institutional context, the national and European QA requirements, and particularly the need for HEIs to respond to a changing environment, be more strategic and contribute effectively to the knowledge society (EUA 2009c: 7).

2.7.3 Future challenges

Student services

Student services are central to the shift towards a student-centred approach and to a stress on student attainment. These developments require great attention to be paid to student services – a relatively neglected area – in order to improve retention rates and the educational experience of a variety of learners. This is particularly important as HE systems are becoming massified and in a context where some countries have had to move from very long first cycles to the shorter, Bologna first-cycle degree. When curricular reforms amount to a simple compression of existing curricula, this can lead to greater stress and less flexibility for students, particularly those with work or family obligations.

Student services are the primary responsibility of HEIs. They need to ensure that students have access to all that they need. It is then incumbent upon institutions to establish local and national links, e.g., by pooling resources with other HEIs and cooperating with national and local bodies and student organisations when these have responsibilities for some student service provision.

From an institutional perspective:

- All aspects of students' well-being must be considered in order to ensure the academic success of all learners, including international and lifelong students. Therefore a range of services must be on offer, comprising academic advising and tutoring, psychological and health services, career centre, legal advice, etc., (including housing, which might require coordination with national or local authorities and student organisations) with special attention paid to specific categories of students such as those with disabilities, family and work obligations, etc.
- Particular attention should be paid to student participation in governance and in quality processes, which sends an important signal to students about the institution's orientation towards them and their role in it.

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From a policy perspective:

- Ensure proper communication, in cooperation with institutions, to potential students through national information points. This includes communicating on the possibilities for student financial support, access, recognition of prior learning, etc.
- Raise awareness of the importance of student services by involving national and European student and HEI associations in order to promote discussion among institutional leaders and to improve cooperation with umbrella bodies dealing with student services at European and national level.
- Strengthen cooperation between HEIs, local and national bodies responsible for different elements of the provision of support, including student organisations, and clarify their respective responsibilities in order to offer seamless provision to students.
- Establish close links between institutional support services, particularly career services, and the regional and national employment offices in order to promote synergies.

Internal quality processes

Much has been achieved in promoting a quality culture in institutions but much remains to be done to make quality culture a reality and to optimise the link between internal and external quality assurance. This must be the joint responsibility of institutions and external agencies.

From an institutional perspective:

- Institutional quality cultures are more effective when they take into account disciplinary differences and sensitivities (EUA 2006). Internal quality processes need not be uniform across institutions or within institutions: they must be adapted

to specific activities and promote creativity and innovation in teaching and learning and research (EUA 2009c). At the same time, Set 1 of the ESGs that applies to institutions can be helpful in framing these processes.

- Where students and academic and administrative staff are meaningfully and constructively engaged in internal quality assurance processes, quality is improved through a renewed sense of shared community and detailed input on the quality of the learning experience.
- Quality processes must be oriented toward improvement and linked to both the institutional strategic cycle and the external evaluation cycle in order to reduce the financial burden and the time spent on these processes. Particularly, it is essential to ensure good data collection and analyses at central level in order to develop a global picture of the institution and to reduce the burden of these internal quality processes on individual units (EUA 2006).
- Internal quality processes need to be comprehensive and can be used to track progress with Bologna and ensure the quality of the learning environment.

From a policy perspective (see also Section 2.4.5):

- External quality assurance must seek a balance between autonomy and accountability, take into account internal quality processes and stress the self-evaluation phase as the crucial phase in the process in order to ensure the institution's engagement in the evaluation process and the implementation of recommendations, thus leading to improved quality levels.

2.8 Conclusions

2.8.1 Looking back

Looking back over a decade of reform, it is clear that a great deal of progress has been made. Most of the Bologna 'architecture' is now in place. The three-cycle degree structure is implemented or is being implemented across Europe with the variety one might expect given the diversity of the higher education landscape. This includes considerable change at the level of the third cycle through the introduction of structured Doctoral programmes and increased attention being paid to preparing Doctoral candidates for career paths in and outside of academia. ECTS is to all intents and purposes 'the' credit system in use in the EHEA although there is a need for more consistency in its use and for a clearer link to learning outcomes. Similarly, the Diploma Supplement is also widely used even although the evidence suggests that the 2007 amended guidelines are not being followed.

Framing these changes is a European Framework of Qualifications for the EHEA and significant, if understandably slow, progress is being made regarding the development and implementation of national qualifications frameworks. Both the European Standards and Guidelines on Quality Assurance and the European Quality Assurance Register are being used and are an established part of the landscape.

Cooperation is now an established means of working, across widely different countries and with a variety of stakeholders. There remains a strong, albeit not complete, consensus in favour of the Bologna reforms and the stage is set for creating flexible learning paths that are responsive to the needs of an increasingly diverse population.

These changes have been significant and have engaged the energy of many members of the academic community: HEI and student associations (including EUA), institutional leaders, academic and administrative staff and students. It is particularly important to highlight the role of administrative staff who have had the responsibility of developing and managing the processes and mechanisms needed to implement many of these changes and thus made a major contribution to keeping the institutions running, even during the chaotic early phases of implementation: they are the unsung heroes of the Bologna Process.

All of these achievements have happened against the background of an expansion of Bologna action lines, the number of countries involved, the overall growth in the rate of participation in higher education (albeit at different rates depending on the country) and the wider set of policy changes affecting institutions. It is also worth noting that while a high-level convergence is taking place and Bologna has promoted successfully the notion of European higher education and helped develop the European identity of institutions, national, cultural and institutional diversity continues to be a defining element of European higher education.

The international dimension is also becoming increasingly important, and indeed international interest in Bologna continues to grow. However, the degree to which European frameworks and reference points developed through the Bologna Process, rather than specific national priorities and agendas, will form the basis for international partnerships remains to be seen, especially as funding sources remain predominantly national.

2.8.2 Looking ahead

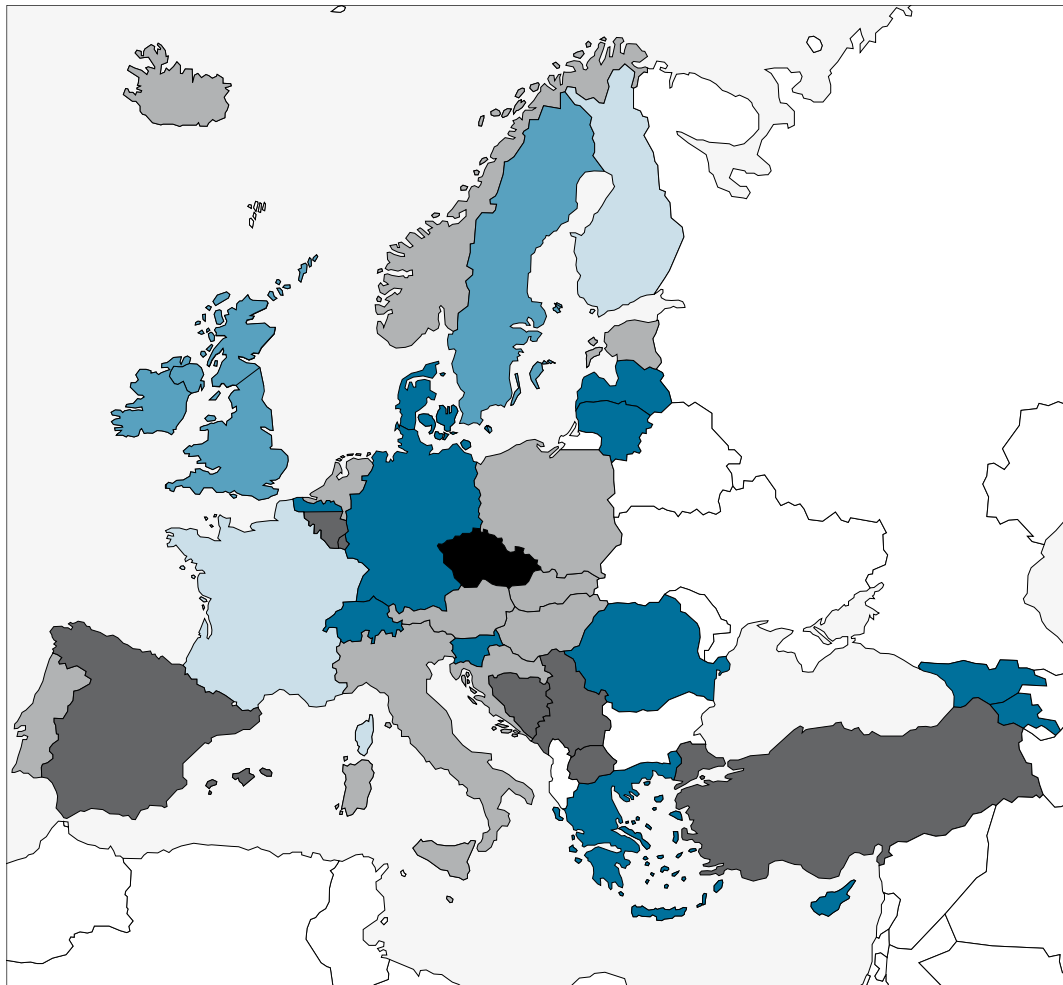
When comparing the data collected in 2003, 2007 and 2010, it is clear that the rapid implementation of 'Bologna tools' peaked around 2007 and that the key findings and recommendations developed in *Trends V* still stand. For the past three years, the change agenda has shifted to the more complex, less quantifiable issues of cultural change and embedding the structural changes and individual Bologna tools in institutions. At the same time, given the rapid transformation of higher education in many countries, issues of institutional governance, leadership and strategic development have grown in importance. Thus, when institutions are asked which developments will most affect them in five years' time, only 15% mention the Bologna Process.

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Trends 2010 (2010)

Map 14 — Developments that will most affect higher education institutions in 5 years' time (by largest group of respondents)



| | |
|---|----|
| Quality Assurance reforms | 13 |
| Funding reforms | 5 |
| Governance reforms | 2 |
| European research and innovation policies | 1 |
| The Bologna Process | 7 |
| Internationalisation | 12 |

In a sense, Europe (or perhaps more precisely the ‘first generation’ of Bologna implementers) seems already to have moved beyond the formal implementation of the Bologna tools, the progress of which was carefully tracked in the previous *Trends* reports (cf. Reference list). It is clear that the momentum of purely Bologna-driven change has slowed relative to the first seven years when considerable efforts were needed to change the basic structure of degrees across Europe. However it takes considerable time for academics to implement and take ownership of the Bologna tools in a way that would promote the deeper agenda of more student-centred learning. This issue alongside attitude changes and staff development will require further attention. Thus, tracking trends in the future will have to be more contextualised and focused on how institutions are managing multiple – sometimes incoherent – policy changes in times of funding restrictions, new demographic trends, globalisation and increased international competition.

What does the future hold for the European Higher Education Area and for the Bologna Process as the broad, inclusive platform for discussing, implementing and monitoring progress in higher education reform in Europe? The next phase – perhaps the most critical phase – will be to deepen the change process. This, it is suggested, can be achieved by creating new organisational cultures and using the architecture, quality infrastructure and the Bologna tools in the national and institutional contexts. These will have to be moderated, of course, by institutional and national priorities, resource constraints, and a changing international context. Trying to implement the changes in a single year, as some ministries have asked, is likely to be doomed and will require an iterative change process.

In addition, the concerns that have been expressed by many stakeholders during the course of the Bologna reforms and which remain current are (i) the needs to implement the Bologna reforms as a package (as opposed to ‘à la carte’), (ii) to invest higher education institutions with the ownership of the reforms if they are to be implemented properly, (iii) to communicate better to a wider public the benefits of these significant changes, (iv) to understand that curricular changes take time to be implemented properly and, (v) perhaps most importantly, to take into account the “dislodging power” (cf. Part I) of Bologna. In regard to the last point it is important to recall its link with

other European policy agendas – in that it has triggered a host of significant and profound changes in institutions.

Wide consultation is particularly important given the complex policy agenda. Broadly speaking, higher education institutions and the national rectors’ conferences still see the Bologna Process and action lines as relevant and positive and there is strong indication that the commitment to Bologna is not waning. Thus, the commitment to change remains important and is a critical success factor. Successful implementation of policy change, however, hinges on local political cultures, i.e., whether the majors actors – national rectors’ conferences, students, ministry staff and others, such as employers – are invited to sit around the same table and engage in a conversation about ways and means of achieving common goals. However, many national rectors’ conferences noted in their responses that they are involved in discussions on a few rather than on all Bologna action lines and this affects overall results.

Future challenges underpinning the EHEA for all actors at institutional, national and European level, include:

- Maintaining and extending the method of cooperation and further building upon the cooperative governance model developed through the Bologna Process in order to ensure the quality and sustainability of national higher education reforms (underpinned by the trends and pressures described in Part I and the analysis in Part II). This will ensure the effectiveness and broad ownership of policies.
- Being in a position to communicate clearly to the public and stakeholders the benefits of the change. Employers in particular are still not fully informed and academics and students not always on board with the usefulness of ‘Bologna degrees’, especially with the first-cycle award and the need to be engaged in the discussion better.
- Successful implementation of Bologna is partly conditional on the capacity of institutional leaders to bring institutional coherence to a multi-dimensional change agenda, and to explain, persuade and motivate staff members, and students. Therefore, emphasis should be placed on institutional responsibility in the further implementation of the Bologna Process. HEIs should have considerable scope in implementing the change agenda, which they must be able to relate to their specific

2

European Higher Education Institutions in the Bologna Decade

mission and objectives, thereby respecting institutional diversity.

- The change process must be adequately resourced, particularly because the shift to student-centred learning entails developing new teaching skills, smaller staff-student ratios, and adapted classroom infrastructures.
- Data collection at institutional, national and European levels must be improved. As seen in Part II, this concerns the data on mobility (including 'free movers' and full-degree mobility), employability (students' entry in the labour market and their career development over several years), student-staff ratios at all degree levels, graduation and drop-out rates, time to degree, recognition of prior learning, and students' socio-economic backgrounds. In addition, given the demographic changes mentioned in Part I, an analysis of staff data (by age, gender and status) is crucial in order to plan for the future.
- The different Bologna action lines must be considered in an integrated fashion and focused on the underlying objectives: to equip learners – young and old – to play their part in society and prepare them to be European and global citizens through the

acquisition of high-level skills. This requires situating the Bologna Process in the wider discussion of the kind of citizens Europe needs for the 21st Century and translating the resulting ideas into strategies that fit each institution's profile and mission.

3 A Four-point Agenda for the European Higher Education Area

Part I focused on European higher education institutions and showed how they have changed in deep and significant ways in response to international trends and European policies, including the Bologna Process. Part II focused on the student experience and the engagement of staff by examining the different components of the Bologna reforms through the prism of student-centred learning and the imperatives of ensuring both social cohesion and quality.

Part III brings these foci together – the institutions, their students and staff – and proposes a set of future policy priorities for the EHEA. Thus, strictly speaking, Part III is not a concluding chapter about the Bologna Process (for this, cf. Part II). Rather, it presents a four-point agenda for the EHEA that addresses the question of how to sustain momentum in the Bologna Process.

The proposed agenda weaves in the main cross-cutting themes that emerged in Parts I and II. It also integrates the key drivers for policy change that were identified, in particular: (i) respect and support for mission diversification and robust institutional

autonomy, (ii) adequate and sustainable funding and (iii) most importantly, ensuring a broad ownership of the change process among all stakeholders through their direct involvement in the policy and decision-making process.

Part III is set in the context of the greater synergies that are being created between the Bologna Process and the Lisbon Strategy, and calls for better links between the European research and education areas. The European Union is already building its new strategy for the next ten years in its “EU 2020” discussion document with the proposal to base “growth on knowledge”. This is in sharp contrast to the mixture of current priorities in the Bologna Process: to ensure further implementation of Bologna and monitor it through a range of indicators.

Thus, the central aim of the following agenda is to promote a discussion, involving all partners, of the kind of citizens Europe needs for the 21st Century, to consider its implications for higher education systems and institutions, and to find an appropriate balance between European convergence and national and institutional diversity.

3.1 European citizens for the 21st Century: lifelong access to learning

As mentioned in Part II, institutional strategic orientations and European and national higher education policies would be enormously helped if they are framed within a broad vision of the society of the future and of its educated citizens.

This would help institutions to exploit fully the link between the different elements of the Bologna Process and to engage in the required curricular and pedagogical renewal that the shift to student-centred learning entails – a renewal that must be cast within a lifelong learning perspective, and with the goals of widening and increasing access.

In particular, the objectives set out in the EUA “Charter on Lifelong Learning” require

a shared commitment and support from governments, higher education institutions, social partners and relevant stakeholders to work closely together in the development and financial support of appropriate measures in future years.

By integrating the three cycles, from the Bachelor to the Doctoral level, the Bologna Process represents an opportunity for the development of coherent policies that will encompass all three degree levels and improve their acceptance by employers. Qualifications frameworks based on learning outcomes will facilitate mobility and employability at all levels and will increase the coherence and articulation of the three cycles.

These objectives must be set in the perspective of supporting the diversification of institutional missions and profiles. This will ensure that higher education systems achieve the goals of both social cohesion and quality and meet a range of societal needs through an appropriate mix of institutions with different profiles.

In this context, it is crucial to consider the various drivers of diversification, most particularly quality assurance, academic careers and funding policies. It is also critical

to consider how best to increase the capacity of higher education institutions to respond to a changing socioeconomic environment. This will require clearly articulated autonomy of institutions, which is a condition of their responsiveness.

EUA, on behalf of its members, will continue to work on these topics in order to clarify the multiple dimensions of the concept of autonomy, and the success factors of the attendant policy changes and their impact on institutional diversification.

3.2 A partnership to support quality, creativity and innovation

Quality has been at the heart of the Bologna Process as demonstrated by institutional quality developments. European quality assurance developments – the European Standards and Guidelines (ESGs) the European Register of Quality Agencies (EQAR), and the annual European QA Forum – have been one of the most concrete and successful aspects of Bologna and an indication that grassroots cooperation of stakeholders is a crucial success factor in a change process.

One of the on-going challenges for the next decade is to press for the continuing engagement of all stakeholders in quality assurance developments, including students. This is particularly important at national level where evidence suggests that there is room for improvement in involving all partners in the policy-making process. This will clarify the division of labour between institutions, national authorities and quality assurance agencies, particularly in the changing context brought about by autonomy reforms and increased awareness of the strategic importance of higher education institutions to national and European knowledge societies.

This dialogue must address such central questions as: (i) Are internal and external quality assurance processes supporting the modernisation agenda of higher education institutions, their strategic orientations and the requirements of knowledge-driven societies? (ii) Is the use of indicators or criteria sufficiently flexible to support the diversification of national higher education systems? The answers to these questions must be framed in the perspective of supporting meaningful quality developments by improving the articulation of internal and

external quality assurance in the context of the enlarged scope of institutional autonomy and the institutions' responsibility for internal quality.

At European level the challenge is to support diversity across – and within – 46 countries while adhering to unifying principles and values. These common 'standards' must be framed in such a way that they do not stifle diversity, innovative teaching practices and creative research, and that they do promote quality levels substantially through the central role of HEIs.

This was the spirit in which the ESGs were developed. The current plan to develop rankings and performance indicators for higher education must be guided by the same objectives: increase understanding of diversity rather than to standardise it and unleash innovative capacities rather than to inhibit risk taking.

The current stress on indicators in the Bologna Process should not overshadow the importance of keeping a balance between accountability and improvement, quality measurement and quality assurance, and a thoughtful articulation between what needs to be done internally (at the level of institutions) and externally (by governmental or quasi-governmental agencies).

EUA, with its E4 partners, will continue to work on these issues by promoting a good understanding and implementation of the ESGs through a project to assess their use. To ensure more effective implementation and commitment it is critical that the ownership of the ESGs continues to rest with the stakeholders. If there is a need to revise the text, this responsibility must be lodged in the E4 Group.

3 A Four-point Agenda for the European Higher Education Area

In addition, EUA will provide an annual analysis of ranking instruments. The Association will also continue to emphasise institutional

responsibility in quality assurance as well as the importance of enhancement and contextualised approaches to quality assurance.

3.3 A European higher education identity in the world

The Bologna Process has had multiple impacts on European higher education identity within Europe and beyond. Within Europe, the Bologna Process has accelerated the integration of new member states and the accession preparation of EU candidate countries. Other countries further afield have also changed significantly their higher education, with an eye on European policy developments: some are adopting the Bologna reforms as their own; others are developing local adaptations.

The Bologna Process has also reinforced the European identity of institutions because they are identified as Europeans internationally. Beyond the fear of European hegemony, international perceptions are largely positive and have reinforced interest in regional integration and intra- and inter-regional dialogue and cooperation, supranational frameworks, new models of negotiating higher education policies based on government/stakeholder cooperation and, more generally, the need to rethink how higher education should respond to multiple societal demands.

The growing European identity in the world – while strong at policy level – still seems to leave practical aspects of institutional behaviour unaffected. There is little European cooperation outside Europe, with each European country pursuing its own internationalisation strategy despite the “Global dimension strategy” adopted at the 2007 Bologna Ministerial meeting. In addition, there seems to be a great deal of variation in how institutions define the geographical scope of internationalisation. For some, it means any activity beyond Europe, while, for others, it refers to any activities beyond national borders. In effect,

the different semantics may signal whether the primary identity or affiliation of an institution is European or not.

To reinforce European presence in the world, the European Commission provides some funding opportunities for joint activities beyond Europe’s borders. If properly designed and funded, operational links between institutions and organisations across Europe and international partners could be further developed. This would contribute to promoting common European approaches to international outreach and to capitalise on European cultural and linguistic diversity.

Such additional funding streams offer new opportunities to consolidate European identity in the world. However, at the same time, attention needs to be paid to the question as to whether European cooperation will not be diluted in internationalisation in the years to come, at a time when European construction – at the political level – is showing signs of fatigue. This issue will require monitoring in future years.

EUA will continue to expand its international activities through concentrating on inter-regional dialogue and providing its members with a variety of platforms to interact with colleagues in different world regions, while continuing to promote the development of a strong European Higher Education and Research Area.

3.4 The European Knowledge Area

Both the EHEA and the ERA create opportunities and responsibilities for European HEIs, as has been highlighted throughout this report. In future it will be important to strengthen the links between the ERA and EHEA through a focus on such issues as Doctoral education, researchers' careers and mobility. This would enhance one of the singular strengths of European higher education – the unique role of universities in ensuring a close interface between education, research and innovation.

Strengthening these links will require extending the cooperation model of the Bologna Process so as to encompass the other partners, including different Ministries, that need to work together on issues such as social security, visas, portability of grants, etc. in as far as they also relate to early stage researchers' career and mobility issues. This would ensure progress on some of the slowest aspects of Bologna reforms while also addressing key challenges for the European Research Area.

As documented in this report, European HEIs are facing multiple challenges that require them to be more strategic as they implement a significant and multidimensional change agenda. This requires institutional leadership and the strengthening of institutions as communities of learners and academics. In view of the current economic crisis, it is of equal importance to secure investment in the knowledge economy through sustained funding of education and research in order to reach the set goals and to avoid harming the education and prospects of the current student cohorts.

Facing these challenges also requires framing the Bologna discussions in a broader context in order to refocus on the wider goals and objectives of the EHEA rather than concentrating on the more technical aspects of the implementation of specific tools. This would contribute to sharpening a communication strategy focused on conveying the benefits of these changes to individual students and academics and to society at large. Such communication is acutely needed and should be coordinated at the European, national and institutional levels.

EUA will continue to support its members as they respond to their changing environment and emphasises that the success of Bologna has hinged on the involvement of all actors, including students, staff and institutions, in

policy discussions. This *modus operandi* at the European level must continue and be strengthened at the national and institutional levels in order to meet the ambitious objectives set for Europe.

To meet these objectives EUA will also continue to advocate for closer links between the EHEA and the ERA and thus for a European Knowledge Area crucial for universities to be able to educate graduates equipped with the high level skills Europe needs for the knowledge societies of the 21st Century.

Appendix 1

Trends 2010 Questionnaire

I. General questions

- t1. When was your institution founded? *(Please mention the approximate year)*
- t2. a) How many academic staff are employed at your institution? *(Please give an approximate figure)*
 b) How many administrative staff are employed at your institution? *(Please give an approximate figure)*
- t3. What is the total number of students for each degree level to which your institution trains students? *(Please give an approximate figure)*

| | Full-time | Part-time |
|-----------------------------|-----------|-----------|
| 1. Bachelor (first cycle) | | |
| 2. Master (second cycle) | | |
| 3. Doctorate (third cycle) | | |
| 4. Non-degree students | | |
| 5. Total number of students | | |

- t4. Which community do you see your institution primarily as serving?

| | |
|---------------|-----------------------------------|
| 1. Local | Your answer: please choose one |
| 2. Regional | |
| 3. National | |
| 4. European | |
| 5. World-wide | |

- t5. How would you describe the profile of your institution?

| | |
|--|-----------------------------------|
| 1. Primarily research-based | Your answer: please choose one |
| 2. Primarily teaching-oriented | |
| 3. Both research-based and teaching-oriented | |

- t6. In my institution, the realisation of the European Higher Education Area (EHEA)

| | |
|-------------------------------------|-----------------------------------|
| 1. Has generally been very positive | Your answer: please choose one |
| 2. Has had mixed results | |
| 3. Has been negative | |
| 4. Has made no difference | |

II. Institutional mission

- t7. a) Over the past three years, how important have the following developments been for your institutional strategy? *(please mark one option for each item)*

| | Low importance | Medium importance | High importance | Your answer: |
|--|----------------|-------------------|-----------------|-----------------------|
| 1. Internationalisation | 1 | 2 | 3 | > please choose one < |
| 2. European research and innovation policies | 1 | 2 | 3 | > please choose one < |
| 3. The Bologna Process | 1 | 2 | 3 | > please choose one < |
| 4. Governance reforms | 1 | 2 | 3 | > please choose one < |
| 5. Funding reforms | 1 | 2 | 3 | > please choose one < |
| 6. Rankings/ league tables | 1 | 2 | 3 | > please choose one < |
| 7. Quality Assurance reforms | 1 | 2 | 3 | > please choose one < |
| 8. Demographic changes | 1 | 2 | 3 | > please choose one < |

b) What will be the most important development in five years' time?

| | |
|--|-----------------------------------|
| 1. Internationalisation | Your answer: please choose one |
| 2. European research and innovation policies | |
| 3. The Bologna Process | |
| 4. Governance reforms | |
| 5. Funding reforms | |
| 6. Rankings/ league tables | |
| 7. Quality Assurance reforms | |
| 8. Demographic changes | |

t8. Over the last ten years, how important have the following changes been to your institution? (please mark one option for each item)

| | Low importance | Medium importance | High importance | Your answer: |
|--|----------------|-------------------|-----------------|-----------------------|
| 1. New academic career policies | 1 | 2 | 3 | > please choose one < |
| 2. New entry requirements to different cycles | 1 | 2 | 3 | > please choose one < |
| 3. Changes in tuition fees | 1 | 2 | 3 | > please choose one < |
| 4. Enhanced cooperation with other Higher Education Institutions | 1 | 2 | 3 | > please choose one < |
| 5. Enhanced cooperation with industry | 1 | 2 | 3 | > please choose one < |
| 6. More competition with other Higher Education Institutions | 1 | 2 | 3 | > please choose one < |
| 7. More autonomy | 1 | 2 | 3 | > please choose one < |
| 8. Less autonomy | 1 | 2 | 3 | > please choose one < |
| 9. More diversified funding | 1 | 2 | 3 | > please choose one < |
| 10. Enhanced internal quality processes | 1 | 2 | 3 | > please choose one < |
| 11. Other – please specify | 1 | 2 | 3 | > please choose one < |

t9. In the past five years what have been the three most important developments in the funding of your institution? (please choose three items)

| |
|---|
| 1. Increased funding for teaching |
| 2. Decreased funding for teaching |
| 3. Introduction of tuition fees |
| 4. Increased national research funding through public sources |
| 5. Increased European or international research funding |
| 6. Increased research funding through private sources (e.g., from enterprise) |
| 7. Decreased national research funding through public sources |
| 8. Decreased European/international research funding |
| 9. Decreased research funding through private sources (e.g., from enterprise) |
| 10. Other (please specify:) |

Your answer: → first choice: → second choice:→ third choice

t10. How have you involved your students in the governance of your institution (e.g. the implementation of the Bologna Process)? (several answers allowed; please mark the selected choices in the second column)

| | |
|---|--------------------------|
| Q10_1 Formally, through participation in senate/council | <input type="checkbox"/> |
| Q10_2 Formally, at faculty/department level | <input type="checkbox"/> |
| Q10_3 By providing information on the issues involved | <input type="checkbox"/> |
| Q10_4 By supporting our students to attend national discussions on the issues | <input type="checkbox"/> |
| Q10_5 Other (please specify:) | <input type="checkbox"/> |
| Q10_6 Not applicable | <input type="checkbox"/> |

Appendix 1

t11. Which of these services does your institution provide for its students? (several answers allowed; please mark the selected choices in the second column)

| | |
|---|--------------------------|
| Q25_1 Academic orientation services | <input type="checkbox"/> |
| Q25_2 Accommodation facilities | <input type="checkbox"/> |
| Q25_3 Career guidance services | <input type="checkbox"/> |
| Q25_4 Psychological counselling services | <input type="checkbox"/> |
| Q25_5 Sports facilities | <input type="checkbox"/> |
| Q25_6 Information on study opportunities in other institutions | <input type="checkbox"/> |
| Q25_7 Language training | <input type="checkbox"/> |
| Q25_8 Social and cultural activities (bars, cinema clubs, theatre, music etc) | <input type="checkbox"/> |

III. Degree structure and curricula

t12. Does your institution have a degree structure based on either two or three main cycles (Bachelor, Master, PhD) in most academic fields?

| | |
|---|-----------------------------------|
| 1. Yes, we already had it before the Bologna process | Your answer: please choose one |
| 2. Yes, we introduced it as a result of the Bologna Process | |
| 3. Not yet, but this is planned | |
| 4. No, we do not plan to do this | |

t13. If yes, would you consider that the two/three-cycle structure functions

| | |
|--------------------|-----------------------------------|
| 1. Extremely well | Your answer: please choose one |
| 2. Reasonably well | |
| 3. Not very well | |
| 4. Not at all well | |

t14. If the following professional disciplines are taught at your institution, does the Bachelor/Master structure apply to them as well? (please choose one option for each item)

| | Low importance | Medium importance | High importance | Your answer: |
|---------------------|----------------|-------------------|-----------------|-----------------------|
| 1. Medicine | 1 | 2 | 3 | > please choose one < |
| 2. Dentistry | 1 | 2 | 3 | > please choose one < |
| 3. Architecture | 1 | 2 | 3 | > please choose one < |
| 4. Pharmacy | 1 | 2 | 3 | > please choose one < |
| 5. Nursing | 1 | 2 | 3 | > please choose one < |
| 6. Veterinary | 1 | 2 | 3 | > please choose one < |
| 7. Midwifery | 1 | 2 | 3 | > please choose one < |
| 8. Teacher training | 1 | 2 | 3 | > please choose one < |
| 9. Law | 1 | 2 | 3 | > please choose one < |
| 10. Engineering | 1 | 2 | 3 | > please choose one < |

t15. In the framework of the Bachelor/Master structure, has your institution recently defined the entry requirements for Master level programmes?

| | |
|--|-----------------------------------|
| 1. Yes, as a result of national legislation | Your answer: please choose one |
| 2. Yes, within an overall institutional policy | |
| 3. Yes, each department/faculty takes care of its programme conditions | |
| 4. No, our institution has not yet discussed such issues | |
| 5. Not applicable | |

t16. Has your institution re-considered curricula in connection with the Bologna process, particularly with regard to adapting programmes to the new degrees structure?

| | |
|--|-----------------------------------|
| 1. Yes, in all departments | Your answer: please choose one |
| 2. Yes, in some departments | |
| 3. Not yet, but we will do so in the near future | |
| 4. No, we do not see the need for this | |

t17. If your institution awards doctoral degrees, what structure exists at your institution? (*several answers allowed; please mark the selected choices in the second column*)

| | |
|---|--------------------------|
| 1. Individual mentoring | <input type="checkbox"/> |
| 2. Doctoral programmes including taught courses | <input type="checkbox"/> |
| 3. Doctoral research schools including both Master and PhD students | <input type="checkbox"/> |
| 4. Doctoral research schools including only PhD students | <input type="checkbox"/> |

Modularisation and learning outcomes

t18. a) Have you changed the organisation of study programmes from a system based on the academic year to one based on study units or modules?

| | |
|--|-----------------------------------|
| 1. Yes, in all study programmes | Your answer: please choose one |
| 2. Yes, in some study programmes | |
| 3. Not yet, but we will do so in the near future | |
| 4. No, we do not see the need for this | |

b) If yes, has the modularisation of courses led to

| | |
|---|-----------------------------------|
| 1. More flexibility in choice of courses for the students | Your answer: please choose one |
| 2. Less flexibility in choice of courses for the students | |
| 3. No change | |
| 4. I don't know | |

c) If yes, has modularisation led to

| | |
|--|-----------------------------------|
| 1. A decrease in the number of examinations | Your answer: please choose one |
| 2. An increase in the number of examinations | |
| 3. No change | |
| 4. I don't know | |

t19. Have Learning Outcomes been developed?

| | |
|--------------------------|-----------------------------------|
| 1. Yes, for all courses | Your answer: please choose one |
| 2. Yes, for some courses | |
| 3. No | |
| 4. I don't know | |

Credit systems

t20. Does your institution use a credit accumulation system for all Bachelor's and Master's programmes?

| | |
|--|-----------------------------------|
| 1. Yes, ECTS | Your answer: please choose one |
| 2. Yes, but not ECTS | |
| 3. Not yet, but we intend to develop one in the future | |
| 4. We do not intend to implement one | |

t21. Does your institution have a credit transfer system for all Bachelor's and Master's programmes?

| | |
|--|-----------------------------------|
| 1. Yes, ECTS | Your answer: please choose one |
| 2. Yes, but not ECTS | |
| 3. Not yet, but we intend to develop one in the future | |
| 4. We do not intend to implement one | |

Appendix 1

t22. If your institution has a credit system, is it also used at doctoral level?

| | |
|--|-----------------------------------|
| 1. Yes | Your answer: please choose one |
| 2. Yes, only for taught courses in doctoral programmes | |
| 3. No, we do not intend to apply credits at the doctoral level | |

t23. If there is a National Qualifications Framework in your country, is it useful when developing curricula corresponding to the Bologna degree system?

| | |
|--|-----------------------------------|
| 1. Yes | Your answer: please choose one |
| 2. Sometimes | |
| 3. No | |
| 4. Too early to say | |
| 5. There is no National Qualifications Framework | |

Recognition

t24. Does your institution recognise prior learning (e.g., work experience)?

| | |
|---|-----------------------------------|
| 1. Yes, but only as a component of a study programme | Your answer: please choose one |
| 2. Yes, as equivalent to a full degree (e.g., a student could gain a bachelor based on this and enter a master programme) | |
| 3. No, we don't do this | |

t25. To your knowledge, how aware are the academic staff in your institution of the provisions of the Lisbon Convention and recognition procedures, in general?

| | |
|------------------------------|-----------------------------------|
| 1. Very aware | Your answer: please choose one |
| 2. Reasonably aware | |
| 3. not very aware | |
| 4. Almost completely unaware | |
| 5. No information available | |

t26. Does your institution cooperate with the ENIC/NARIC of your country?

| | |
|--------------------------------------|-----------------------------------|
| 1. Yes, there is close cooperation | Your answer: please choose one |
| 2. There is only limited cooperation | |
| 3. There is no cooperation | |
| 4. I don't know | |

t27. In your institutions, who is responsible for recognition of *(please mark one option for each item)*

| | Central office | Faculty | Department | A Professor | I don't know | Your answer: |
|---|----------------|---------|------------|-------------|--------------|-----------------------|
| 1. Foreign degrees | 1 | 2 | 3 | 4 | 5 | > please choose one < |
| 2. Periods of study abroad | 1 | 2 | 3 | 4 | 5 | > please choose one < |
| 3. Degrees from other institutions in your country | 1 | 2 | 3 | 4 | 5 | > please choose one < |
| 4. Periods of study in other institutions in your country | 1 | 2 | 3 | 4 | 5 | > please choose one < |

t28. Do students returning to your institution from study abroad encounter problems with the recognition of their credits?

| | |
|-----------------------|-----------------------------------|
| 1. Many have problems | Your answer: please choose one |
| 2. Some have problems | |
| 3. None have problems | |

t29. Does your institution issue a Diploma Supplement to graduating students?

| | |
|---|-----------------------------------|
| 1. Yes, to all graduating students | Your answer: please choose one |
| 2. Yes, to all graduating students who request it | |
| 3. Not yet, but this is planned | |
| 4. No, there are no plans to do this | |

t30. If yes, is the Diploma Supplement provided free of charge

| | |
|-----------------|-----------------------------------|
| 1. Yes | Your answer: please choose one |
| 2. No | |
| 3. I don't know | |
| 4. N/A | |

Labour market

t31. Are professional associations and employers involved in designing and restructuring curricula with the relevant faculties and departments?

| | |
|---|-----------------------------------|
| 1. Yes, they are closely involved | Your answer: please choose one |
| 2. Yes, they are occasionally involved | |
| 3. No, they are rarely if ever involved | |

t32. What do you expect your students to do after the first cycle (Bachelor) degree?

| | |
|---|-----------------------------------|
| 1. Most will enter the labour market, while a minority will continue to study at Master level | Your answer: please choose one |
| 2. Some will enter the labour market, and some will continue to study at Master level | |
| 3. A minority will enter the labour market, but most will continue to study at Master level | |
| 4. Difficult to say at this stage | |

t33. a) Does your institution systematically track the employment of graduates?

| | |
|---|-----------------------------------|
| 1. Yes, we track the employment of all recent graduates | Your answer: please choose one |
| 2. Yes, we track some graduates | |
| 3. No, there is no system | |

b) If yes, please indicate after which cycles you track the entry into the labour market? (*several answers allowed; please mark the selected choices in the second column*)

| | |
|-----------------------|--------------------------|
| 1 st cycle | <input type="checkbox"/> |
| 2 nd cycle | <input type="checkbox"/> |
| 3 rd cycle | <input type="checkbox"/> |

IV. Mobility

t34. Comparing incoming and outgoing student mobility, what is the balance?

| | |
|---|-----------------------------------|
| 1. Significantly more incoming than outgoing students | Your answer: please choose one |
| 2. Similar levels of incoming and outgoing students | |
| 3. Significantly more outgoing than incoming students | |

t35. Has teaching staff mobility increased at your institution over the last three years?

| | |
|-----------------------------|-----------------------------------|
| 1. Yes, significantly | Your answer: please choose one |
| 2. Yes, slightly | |
| 3. No change | |
| 4. No, it has decreased | |
| 5. No information available | |

Appendix 1

t36. Do you expect that the three-cycle degree structure provides more opportunities for students to move from one faculty or institution to another **within** a degree cycle (horizontal mobility)?

| | |
|--------------------------------------|-----------------------------------|
| 1. Significantly | Your answer: please choose one |
| 2. Slightly | |
| 3. Not at all | |
| 4. On the contrary, it will decrease | |

t37. Do you expect that the three-cycle structure provides more opportunities for students to move from one institution to another for **the next cycle** of study - e.g. from Bachelor to Master (vertical mobility)?

| | |
|--------------------------------------|-----------------------------------|
| 1. Significantly | Your answer: please choose one |
| 2. Slightly | |
| 3. Not at all | |
| 4. On the contrary, it will decrease | |

t38. Does your institution offer **joint programmes** with other institutions in a **different country**? (several answers allowed; please mark the selected choices in the second column)

| | |
|---|--------------------------|
| 1. Yes, there are examples of joint programmes in all cycles | <input type="checkbox"/> |
| 2. Yes, there are examples of joint programmes in the first cycle (bachelor) | <input type="checkbox"/> |
| 3. Yes, there are examples of joint programmes in the second cycle (master) | <input type="checkbox"/> |
| 4. Yes, there are examples of joint programmes in the third cycle (doctorate) | <input type="checkbox"/> |
| 5. Not yet, but some departments are planning joint programmes | <input type="checkbox"/> |
| 6. No, we do not see the need for joint programmes | <input type="checkbox"/> |

t39. Does your institution offer **joint programmes** with institutions in **your country**? (several answers allowed; please mark the selected choices in the second column)

| | |
|--|--------------------------|
| 1. Yes, with institutions that are similar to ours (e.g., if you are a university, your joint programme is with other universities) | <input type="checkbox"/> |
| 2. Yes, with higher education institutions that are different from ours (e.g., if you are a university, your joint programme is with a polytechnic, further education college) | <input type="checkbox"/> |
| 3. No, we do not see the need for joint programmes | <input type="checkbox"/> |

t40. To improve the conditions of student mobility, has your institution significantly developed any of these services in the last two years? (several answers allowed; please mark the selected choices in the second column)

| | |
|---|--------------------------|
| 1. Welcome and orientation services | <input type="checkbox"/> |
| 2. Accommodation facilities | <input type="checkbox"/> |
| 3. Job opportunities | <input type="checkbox"/> |
| 4. Counselling services | <input type="checkbox"/> |
| 5. Academic tutoring | <input type="checkbox"/> |
| 6. Information on study opportunities in other institutions | <input type="checkbox"/> |
| 7. Language training | <input type="checkbox"/> |
| 8. Social and cultural activities | <input type="checkbox"/> |
| 9. Other (please specify:) | <input type="checkbox"/> |

V. Lifelong Learning

t41. Has your institution developed an overall strategy regarding Lifelong Learning (LLL) initiatives?

| | |
|---|-----------------------------------|
| 1. Yes | Your answer: please choose one |
| 2. Yes, we are in the initial stages | |
| 3. Not yet, but this is planned | |
| 4. No, we do not see the need for this at our institution | |

t42. Does your institution offer any of the following? (*several answers allowed; please mark the selected choices in the second column*)

| | |
|---|--------------------------|
| Continuing Education for adults | <input type="checkbox"/> |
| Professional development courses for those in employment | <input type="checkbox"/> |
| Pre-Bachelor preparatory courses | <input type="checkbox"/> |
| Bridging courses to Master's level | <input type="checkbox"/> |
| Courses for senior citizens | <input type="checkbox"/> |
| Distance learning courses | <input type="checkbox"/> |
| Special support and counselling services for LLL students | <input type="checkbox"/> |

t43. Do you have special policies in place to address the needs of the following groups? (*please choose one option for each item*)

| | Yes | No | I don't know | Your answer: |
|--|-----|----|--------------|-----------------------|
| 1. Mature students (25+) | 1 | 2 | 3 | > please choose one < |
| 2. Senior citizens (60+) | 1 | 2 | 3 | > please choose one < |
| 3. Part-time students | 1 | 2 | 3 | > please choose one < |
| 4. Socio-economically disadvantaged students | 1 | 2 | 3 | > please choose one < |
| 5. Students without formal qualifications | 1 | 2 | 3 | > please choose one < |
| 6. Ethnic minority groups | 1 | 2 | 3 | > please choose one < |
| 7. Immigrants | 1 | 2 | 3 | > please choose one < |
| 8. Students with disabilities | 1 | 2 | 3 | > please choose one < |

VI. Internal and external quality processes

t44. Does your institution evaluate teaching through the usual students' feedback questionnaires?

| | |
|-------------------|-----------------------------------|
| 1. Yes, regularly | Your answer: please choose one |
| 2. Yes, sometimes | |
| 3. No | |

t45. Does your institution have internal evaluation procedures for its study programmes as a whole?

| | |
|-------------------|-----------------------------------|
| 1. Yes, regularly | Your answer: please choose one |
| 2. Yes, sometimes | |
| 3. No | |

t46. Does your institution have internal processes for evaluating individual teaching staff?

| | |
|---|-----------------------------------|
| 1. Yes, they are obligatory | Your answer: please choose one |
| 2. Yes, they are voluntary (each teacher decides whether or not to participate) | |
| 3. No | |

t47. Does your institution have internal processes for evaluating student learning services (e.g. libraries; student orientation/ advice services etc.)?

| | |
|-------------------|-----------------------------------|
| 1. Yes, regularly | Your answer: please choose one |
| 2. Yes, sometimes | |
| 3. No | |

Appendix 1

t48. Does your institution have internal processes for evaluating research teams?

| | |
|-------------------|-----------------------------------|
| 1. Yes, regularly | Your answer: please choose one |
| 2. Yes, sometimes | |
| 3. No | |

t49. Does your institution use data (performance indicators) to measure its research activities?

| | |
|-------------------|-----------------------------------|
| 1. Yes, regularly | Your answer: please choose one |
| 2. Yes, sometimes | |
| 3. No | |

t50. Does your institution use data (performance indicators) to measure its teaching performance?

| | |
|-------------------|-----------------------------------|
| 1. Yes, regularly | Your answer: please choose one |
| 2. Yes, sometimes | |
| 3. No | |

t51. Do your external quality processes (Quality Assurance / Accreditation Agency) include an evaluation of the internal quality processes of your institution?

| | |
|--------|-----------------------------------|
| 1. Yes | Your answer: please choose one |
| 2. No | |

VII. Attractiveness and the external dimension of European higher education

t52. Do you expect that the European Higher Education Area (EHEA) will provide better opportunities for:

a) Students: *(several answers allowed; please mark the selected choices in the second column)*

| | |
|---|--------------------------|
| 1. All students at your institution | <input type="checkbox"/> |
| 2. Most out-going students from your institution | <input type="checkbox"/> |
| 3. Most in-coming students to your institution | <input type="checkbox"/> |
| 4. Mainly the more affluent students at your institution | <input type="checkbox"/> |
| 5. Non-European students considering higher education in your country | <input type="checkbox"/> |
| 6. None | <input type="checkbox"/> |

b) Higher education institutions: *(several answers allowed; please mark the selected choices in the second column)*

| | |
|---|--------------------------|
| 1. All institutions part of the EHEA | <input type="checkbox"/> |
| 2. Mainly the institutions most competitive on the European higher education market | <input type="checkbox"/> |
| 3. Mainly the most prestigious institutions | <input type="checkbox"/> |
| 4. Mainly trans-national providers | <input type="checkbox"/> |
| 5. Mainly postgraduate institutions | <input type="checkbox"/> |
| 6. Mainly institutions within the larger countries in the EHEA | <input type="checkbox"/> |
| 7. None | <input type="checkbox"/> |

t53. In which geographical areas would your institution most like to enhance its international attractiveness?(several answers allowed; please mark the selected choices in the second column)

| | |
|----------------------|--------------------------|
| Q55_1 EU | <input type="checkbox"/> |
| Q55_2 Eastern Europe | <input type="checkbox"/> |
| Q55_3 US /Canada | <input type="checkbox"/> |
| Q55_4 Australia | <input type="checkbox"/> |
| Q55_5 Arab World | <input type="checkbox"/> |
| Q55_6 Asia | <input type="checkbox"/> |
| Q55_7 Latin America | <input type="checkbox"/> |
| Q55_8 Africa | <input type="checkbox"/> |
| Q55_9 None | <input type="checkbox"/> |

t54. Which instruments (incentives or other measures) are used to pursue these priorities? (several answers allowed; please mark the selected choices in the second column)

| | |
|--|--------------------------|
| 1 Offer scholarships to students coming from abroad | <input type="checkbox"/> |
| 2 Apply targeted marketing techniques for student recruitment | <input type="checkbox"/> |
| 3 Establish inter-institutional partnerships/collaborative arrangements/branch campuses in other countries | <input type="checkbox"/> |
| 4 Develop joint programmes or similar cooperation activities | <input type="checkbox"/> |
| 5 Offer study places from students coming from priority areas | <input type="checkbox"/> |
| 6 Offer new programmes taught in English or in another major European language | <input type="checkbox"/> |
| 7 Send our students there for limited periods of study | <input type="checkbox"/> |
| 8 Other (please specify:) | <input type="checkbox"/> |

t55. What are the three most important reasons for your institution's interest in internationalisation? (please choose three items)

| |
|--|
| 1. To enhance the reputation and visibility of our institution worldwide |
| 2. To earn additional funding (in particular from tuition fees) |
| 3. To develop our academic activities (e.g. research collaboration, teaching exchange/collaboration, curricula development, etc.) |
| 4. To enhance and maintain an overall international outlook for the institution (fostering cultural sensitivity, internationalisation 'at home') |
| 5. Solidarity/ Development support for institutions in emerging countries |

first choice > second choice > third choice

COMMENTS

Please use the space below to share with us some of your hopes and concerns regarding the European Higher Education Area. Please add any comments and reactions to this questionnaire as well.

Appendix 2

Country distribution of received questionnaires

| Country | Trends III | Trends V | Trends 2010 | All three waves |
|---|------------|----------|-------------|-----------------|
| Albania | 2 | 2 | 0 | 0 |
| Andorra | 1 | 1 | 1 | 1 |
| Armenia | 1 | 0 | 7 | 0 |
| Austria | 32 | 30 | 24 | 7 |
| Azerbaijan | 0 | 2 | 0 | 0 |
| Belarus | 0 | 1 | 0 | 0 |
| Belgium | 31 | 32 | 35 | 9 |
| Bosnia Herzegovina | 4 | 4 | 6 | 1 |
| Bulgaria | 13 | 12 | 4 | 2 |
| Croatia | 5 | 5 | 4 | 3 |
| Cyprus | 5 | 4 | 3 | 1 |
| Czech Republic | 29 | 24 | 21 | 8 |
| Denmark | 45 | 38 | 12 | 4 |
| Estonia | 7 | 11 | 10 | 1 |
| Finland | 27 | 18 | 24 | 10 |
| France | 78 | 88 | 47 | 10 |
| Georgia | 0 | 14 | 23 | 0 |
| Germany | 58 | 52 | 68 | 6 |
| Greece | 20 | 17 | 11 | 4 |
| Holy See | 3 | 2 | 3 | 1 |
| Hungary | 39 | 15 | 31 | 9 |
| Iceland | 2 | 6 | 3 | 0 |
| Ireland | 15 | 16 | 20 | 7 |
| Italy | 27 | 63 | 60 | 14 |
| Latvia | 29 | 21 | 16 | 10 |
| Liechtenstein | 0 | 0 | 0 | 0 |
| Lithuania | 16 | 14 | 18 | 2 |
| Luxemburg | 1 | 1 | 1 | 1 |
| Malta | 1 | 1 | 1 | 1 |
| Moldova | 0 | 2 | 1 | 0 |
| Montenegro | 0 | 0 | 0 | 0 |
| Netherlands | 12 | 22 | 23 | 6 |
| Norway | 29 | 22 | 20 | 5 |
| Poland | 38 | 99 | 49 | 11 |
| Portugal | 32 | 20 | 25 | 6 |
| Romania | 15 | 15 | 36 | 2 |
| Russia | 1 | 50 | 16 | 1 |
| Serbia | 6 | 2 | 5 | 2 |
| Slovakia | 9 | 11 | 13 | 3 |
| Slovenia | 3 | 3 | 4 | 1 |
| Spain | 28 | 32 | 44 | 8 |
| Sweden | 15 | 22 | 20 | 4 |
| Switzerland | 14 | 16 | 16 | 8 |
| The Former Yugoslav Republic of Macedonia | 2 | 3 | 2 | 1 |
| Turkey | 19 | 30 | 33 | 4 |
| Ukraine | 0 | 8 | 12 | 1 |
| United Kingdom | 44 | 56 | 49 | 12 |
| Other (Eastern Mediterranean University) | 0 | 1 | 0 | 0 |
| Total | 758 | 908 | 821 | 187 |

Appendix 3

National Rectors' Conference Questionnaire and the respondents

EUA Trends 2010 Report National Rectors' Conference Questionnaire

*This questionnaire is designed to collect information on European and national higher education reforms over the past ten years, including the Bologna Process. Your response will be useful to the researchers undertaking the site visits and will contribute to the final report. Should you not have the information readily available, please **do not search extensively** for it among your member institutions. Rather, we prefer to be told that the data are not readily accessible.*

Attached you will find also the NCR responses for Trends IV and Trends V questionnaires. If the situation has remained the same since the previous questionnaires, please copy-paste your response where appropriate.

Please submit the completed questionnaire to Trends2010@eua.be by 28 February 2009.

I. Facts and Figures

1. Number of higher education institutions (HEIs) in your country:
 - a. Number of universities
 - b. Number of polytechnics or specialised colleges
 - c. OtherComments:
 2. Has the number of higher education institutions changed significantly over the past 10 years?
If yes, please explain how and why
 3. Is there a trend in your country towards (please circle all that applies):
 - a. Mergers
 - b. Changes to the status of institutions
 - c. Growth in number of private institutionsIf yes, please explain how and why
 4. Number of post-secondary students (including enrolled PhD students?)
 - a. 1999: Total number of students:
 - i. Percentage of students in universities:
 - ii. Percentage of students in other HEIs:
 - b. 2003: Total number of students:
 - i. Percentage of students in universities:
 - ii. Percentage of students in other HEIs:
 - c. 2008: Total number of students:
 - i. Percentage of students in universities:
 - ii. Percentage of students in other HEIs:Comments:
 5. Student enrolment
 - a. Student enrolment rates in 2003
 - i. Number of students to enter first-year of higher education studies:
 - ii. Number of students to complete a first-cycle study programme:
 - iii. Number of students to enter a second-cycle study programme:
 - iv. Number of students to enter a PhD programme:
 - b. Student enrolment rates in 2008
 - i. Number of students to enter first-year of higher education studies:
 - ii. Number of students to complete a first-cycle study programme:
 - iii. Number of students to enter a second-cycle study programme:
 - iv. Number of students to enter a PhD programme:Comments:
 6. From what source do you obtain information on student mobility in your country?
Comments:
 7. Are those students holding a foreign passports but who have graduated from your secondary schools classified as international students or not?
Y/N
Comments:
 8. What was the number of international students in post-secondary education
 - a. in 1999:
 - i. Number of foreign EU- students:
 - ii. Number of foreign non-EU students:
 - b. in 2003:
 - i. Number of foreign EU students:
 - ii. Number of foreign non-EU students:
 - c. in 2008:
 - i. Number of foreign EU students:
 - ii. Number of foreign non-EU students:Comments:
 9. What was the number of international academic staff
 - a. in 1999:
 - i. Percentage of foreign EU academic staff members:
 - ii. Percentage of non-EU academic staff members:
 - b. in 2003:
 - i. Percentage of foreign EU academic staff members:
 - ii. Percentage of non-EU academic staff members:
 - c. in 2008:
 - i. Percentage of foreign EU academic staff members:
 - ii. Percentage of non-EU academic staff members:Comments:
- #### II. National HE policy and its impact on institutional mission?
10. In your opinion what has been the greatest success of the Bologna Process at the national level?
 11. Beside the Bologna process, what have been the three most important reforms that have been implemented in your country? Please describe briefly.
 - a. Funding
 - b. Autonomy
 - c. Governance
 - d. Quality assurance
 - e. New career structures
 - f. Entry requirements to different cycles
 - g. Research policies
 - h. Innovation policies
 - i. Other

Appendix 3

Comments:

12. Have these reforms been explicitly linked to the development of European Higher Education Area or the development European higher education area policies such as the modernisation agenda, the Lisbon objectives, etc?

Comments:

13. Has there been any national discussion on the impact of the current economic and financial crisis on the higher education sector?
If yes, what are the major concerns and the kind of responses that are being discussed?

III. Awareness/attitudes/impact regarding the Bologna Process

14. Are the national reforms implemented under the Bologna process presented as a distinct national process?

15. To what extent has information about the goals and content of the Bologna Process reached the different stakeholders (students, parents, employers and organisations)?

16. How comprehensively are the Bologna Reforms being implemented in your country? (please circle the most appropriate statement):

- The Bologna reforms have been fully implemented (i.e., all ten action lines)
- The Bologna Reforms are being comprehensively implemented, and the entire system of higher education is under re-examination and reform.
- Legislation has changed to provide a Bologna framework but not all action lines have yet been tackled. Changes are expected to be introduced by 2010.
- Many elements of the Bologna Process are currently being concentrated upon. Full implementation will be made as time and national circumstances permit.
- Only some action lines are deemed to be relevant in our national situation and we are making the relevant changes.
- We believe that no changes need to be made.

17. Has specific funding been provided for the implementation of Bologna reforms? Y/N
If so, is this funding sufficient?

IV. Structural reforms and national qualification framework

18. Is there a fixed national deadline for the institutional implementation

- of a two-cycle system?
Y/N

- of a three-cycle system
Y/N

If yes, when is/was the deadline for the implementation?
If yes, when will/has the first cohort of Bachelor students and Master students graduate/d?

19. Is it still possible to study under the pre-Bologna degree system?
If yes, for which disciplines and when will it be phased out?

First and second-cycle students

20. Bachelor degree:

- What are the most important developments concerning the bachelor degree?

- Is the new bachelor degree valued by the employers?
- Is it common practice that students continue with their master?

If yes, what percentage?

Comments:

21. Master degrees:

- What are the most important developments concerning the master degree?
- Is it possible for first-cycle graduates from the non-university sector to transfer to a master's programme at the university? If yes, does this possibility refer to
 - All master's
 - Vocational masters that lead to a specific profession
 - Certain types of masters
- Are there professionally-oriented master degrees that do not give access to PhD programmes? Y/N

Comments:

Third-cycle students

22. PhD degree: What are the most important developments in this area?

- Introduction of PhD as a qualification
- Introduction of structured doctoral programmes
- Others (please specify)

Comments:

23. Has a national qualification framework been introduced?

- If yes, does it refer to higher education only or to the entire education system?
- If yes, was NRC involved in its development?
- If no, is the introduction planned?

24. Does your NRC have had responsibility in developing the following?(Please circle all that apply)

- Student-centred learning approach
- ECTS
- Learning Outcomes
- Diploma Supplement

Comments:

25. Has your NRC commissioned a national survey to track progress in implementing the Bologna Process?
Y/N

Comments:

V. Quality

26. If the system of national quality assurance has changed in the past five years, please explain the main elements of the change.

27. Does your NRC have any responsibility in developing the external quality framework?
Y/N

Comments:

28. Has there been any national debate on the European Standards and Guidelines for Quality Assurance?
If yes, how are these generally understood (as a set of rules or a set of principles requiring interpretation)?
If yes, has the NRC been involved in these discussions?

29. Has there been any official position on the European Quality Assurance Register in your country?
If yes, has the NRC been involved in this discussion?

VI. Internationalisation and Mobility

30. What do you consider to be the main obstacles to mobility
- for staff
 - for students
- Comments:

31. Does your country have a national strategy for the internationalisation of higher education?
- If yes,
- Are certain countries targeted and which ones?
 - Are certain student groups targeted and at which level?
 - Does it include opening franchised degrees, branch campuses or other structures overseas?
- If yes, please explain.
32. Do institutions in your country charge tuition fees for international (non-European) students only?
33. If all students have to pay tuition fees, is it the same fee for European and non-European students?
- Comments:

VII. Joint degrees

34. Does your legislation allow institutions to award a joint degree with institutions within your country? With international partners?
35. Have there been new developments allowing institutions to award joint degrees (national strategy, financial support, etc.) and what have been the outcomes? Have you seen an increase in the number of joint degrees as a result?

VIII. Employability

36. To what extent has employability been a guiding principle when implementing the three-cycle system?
37. Is the employment of higher education graduates monitored
- Nationally
 - Institutionally
 - Not at all
- Please indicate the percentage of first-cycle graduates entering the national labour market within six months of completing their degree
 - What kind of information is gathered on the destination of second-cycle graduates?
What are the main trends?
 - What kind of information is gathered on the destination of PhD graduates?
What are the main trends?

IX. Widening access and Lifelong learning

38. Does your country have a national strategy for lifelong learning (LLL)?
- If yes, have HEIs been consulted on the development of the strategy?
 - If no, is a strategy envisaged in the near future?
39. How do you define an LLL student?
40. What is identified as part of the provision of LLL in your country (Please circle all that apply)
- Continuing education for adults
 - Professional development courses for those in employment
 - Pre-bachelor preparatory courses
 - Bridging courses to master's level
 - Courses for senior citizens
 - Distance learning courses
 - Special support and counselling services for LLL students
- Comments:
41. Does the national strategy include recognition of prior learning such as formal and informal training, employment, work experience and life experience?
42. Is there a national policy in place for institutions to widen student participation?
- If yes, please briefly explain the incentives
43. Is LLL commonly a part of the HEIs strategy?

X. Bologna Priority

44. In your opinion, what has been the single most important issue with regard to the Bologna process in your country over the past ten years?

Thank you very much for taking the time to complete this questionnaire. Your assistance in the Trends 2010 project is invaluable.

Please send completed questionnaires to Trends2010@eua.be before 28 February 2009

National Rectors' Conferences that completed the NRC questionnaire

- Austria, Universities Austria
- Belgium NL, Flemish Interuniversity Council, Flemish Community of Belgium (VLIR)
- Belgium FR, Rectors' Conference, French Community of Belgium (CREF)
- Czech Republic, Czech Rectors' Conference (CRC)
- Denmark, Universities Denmark
- Estonia, Estonian Rectors' Conference
- Finland, Finnish Council of University Rectors (FCUR)
- France, Conférence des Présidents d'Universités (CPU)
- Germany, German Rectors' Conference (HRK)
- Greece, Greek Rectors' Conference
- Hungary, Hungarian Rectors' Conference
- Iceland, National Rectors Conference in Iceland (NRCI)
- Ireland, Irish University Association (IUA)
- Italy, Conferenza dei Rettori delle Università Italiane (CRUI)
- Latvia, Latvian Rectors' Council
- Lithuania, Lithuanian Universities Rectors' Conference
- Luxembourg, Université du Luxembourg
- Netherlands, Association of Universities in the Netherlands (VSNU)
- Norway, The Norwegian Association for higher education institutions (UHR)
- Poland, Conference of Rectors of Academic Schools in Poland (CRASP)
- Scotland, Universities Scotland
- Slovakia, Slovak Rectors' Conference (SRK)
- Slovenia, Association of Rectors of Slovenia (ARS)
- Spain, Spanish Rectors' Conference (CRUE)
- Sweden, Association of Swedish Higher Education (SUHF)
- Switzerland, Rectors' Conference of the Swiss Universities (CRUS)
- United Kingdom, Universities UK

Appendix 4

Trends 2010 Site Visits

a) Institutions that participated in Trends 2010 site visits:

- Fachhochschule Kärnten, Austria
- University of Salzburg, Austria *
- Ghent University (UGent), Belgium *
- University of Liège (ULg), Belgium *
- University of Copenhagen, Denmark *
- Stockholm University, Sweden *
- Uppsala University, Sweden
- Université Paul Cézanne Aix-Marseille 3, France *
- Institut National Polytechnique Toulouse - INP Toulouse, France
- German Sport University Cologne, Germany **
- Fachhochschule Bielefeld, Germany
- University of Ioannina, Greece *
- University of Debrecen, Hungary *
- Eötvös Loránd University (ELTE), Hungary
- Libera Università di Lingue e Comunicazione (IULM), Italy **
- Università degli studi di Roma - Tor Vergata, Italy
- University of Latvia, Latvia *
- Poznan University of Technology, Poland **
- Warsaw University, Poland
- The Transylvania University of Brasov, Romania
- University of Bucharest, Romania
- People's Friendship University of Russia (PFUR), Russia
- Higher School of Economics (HSE), Russia
- University of Novi Sad, Serbia
- Universidad de Cantabria, Spain *
- Universitat Pompeu Fabra (UPF), Spain
- University of Aberdeen, United Kingdom **
- University of Exeter, United Kingdom

* Visited in Trends IV

** Visited in Trends V

b) Trends 2010 Team Members

Research Team

- Howard Davies, EUA
- Pierre de Maret, Université Libre de Bruxelles
- Lars Ekholm, former Secretary General of Association of Swedish Higher Education
- Viera Farkasova, Slovak Academic Association for International Cooperation
- Eric Froment, Université Louis Lumière-Lyon 2
- Koen Geven, University of Amsterdam
- Nina Gustafsson, Uppsala University
- Ruth Keeling, Cambridge University
- Dionysis Kladis, University of Peloponnese
- Ewa Krzaklewska, the Jagiellonian University
- Jürgen Kohler, Greifswald University
- Tia Loukkola, EUA

- Gerard Madill, EUA
- Tapio Markkanen, former Secretary General of Finnish Rectors' Conference
- Lewis Purser, Irish Universities Association (IUA)
- Riitta Pyykkö, University of Turku
- Christian Schneiderberg, University of Kassel
- Hanne Smidt, EUA
- Jacqueline Smith, former Deputy Head, OECD/IMHE Programme
- Andrée Sursock, EUA
- Pedro Nuno Teixeira, CIPES, Centre for Higher Education Policy Studies
- Annamaria Trusso, EUA
- Charoula Tzanakou, the University of Warwick
- Lazar Vlasceanu, University of Bucharest

National Experts

- Elisabeth Westphal, Austrian Rectors' Conference
- Nadine Jauk, Austrian Rectors' Conference
- Heidi Esca-Scheuringer, Association of Universities of Applied Sciences
- Luc François, Associatie Universiteit Gent - Ghent University Association
- Rikke Skovgaard Andersen, Universities Denmark
- Nicole Nicolas, Conférence des Présidents d'Universités
- Harald Schraeder, Conférence des Présidents d'Universités
- Jan Rathjen, German Rectors' Conference (HRK)
- Peter Zervakis, German Rectors' Conference (HRK)
- Katerina Galanaki-Spiliotopoulos, Greek Rectors' Conference
- István Bartók, Corvinus University of Budapest
- Roberto Moscati, Università degli Studi di Milano-Bicocca
- Antonella Cammisa, Università "La Sapienza" di Roma
- Andrejs Rauhvargers, Latvian Rectors' Council
- Jolanta Urbanik, Conference of Rectors of Academic Schools in Poland
- Andrzej Kraśniewski, Conference of Rectors of Academic Schools in Poland
- Mihai Floroiu, Romanian Agency for Quality Assurance in Higher Education (ARACIS)
- Lazar Vlasceanu, University of Bucharest
- Genadij Gladkov, MGIMO University
- Nikolaev Denis, World Bank
- Martina Vukasovic, Centre for Education Policy Serbia
- Dolors Riba, Universidad Autónoma de Catalunya
- Carmen Quijada Diez, Spanish Rectors' Conference
- Eva Åkesson, Lund University
- Carolyn Campbell, Quality Assurance Agency
- Paul Dowling, UniversitiesUK
- David Bottomley, Quality Assurance Agency for Higher Education (QAA) in Scotland

Appendix 5

Focus group and semi-structured interviews

5.1 Focus groups

FEDORA (European Forum for Student Guidance): Discussion centred on the evolution of student support services in higher education in the past decade

OBSERVAL (European Observatory of non-formal & informal activities): Discussion on the evolution of recognition and validation on prior learning, widening participation and lifelong learning

5.2. Semi-structured interviews:

Standing committee of European doctors (CPME)

European Union of Medical Specialists (UEMS)

Council of European Dentists (CED)

Federation of Veterinarians of Europe (FVE)

Pharmaceutical Group of the European Union (PGEU)

Architects Council of Europe (ACE)

Fédération Européenne d'Associations

Nationales d'Ingénieurs (FEANI)

Line of questioning:

1. In your view, do the Trends statistics (Question 14) on the reform of professional degrees give a reliable picture of the situation of your discipline Europe-wide?
2. Are there particular problems, for example in relation to quality assurance, or to the employability of Bachelors?
3. In your experience, has the implementation of Bologna proved compatible with compliance with the Directive?
4. Do you have a view on whether it is feasible to align the Directive with Bologna? Does your organisation have a relevant policy/ position?

Appendix 6

Overview of national and institutional strategies for lifelong learning, widening participation and access to higher education

Country-by-country overview of access to higher education, universities' possibilities to select their students, legislation and policies for widening participation, recognition of prior learning, and of national and institutional LLL strategies in 2007/2008

Adapted from material contained in:

- Trends 2010 National Rector Conferences' Questionnaire (NRC)
- Trends 2010 Institutional Questionnaire (T2010)
- Key Data on Higher Education in Europe, EUROPEAN COMMISSION 2009 Edition (KD),
- Draft 2008 joint progress report of the Council and the Commission on the implementation of the "Education & Training 2010" work programme "Delivering lifelong learning for knowledge, creativity and innovation" 2008 based on 2007 data (JPR),
- University Autonomy in Europe, EUA (2009) (A)
- Bologna Process Stocktaking report 2009 (SR)
- Access to success, EUA questionnaire 2009 (AS)









National Access/student selection systems as defined in Key data on higher education in Europe:

1. Limitation of places/selection of students at national/regional level for all or almost all fields of study (numerus clausus)
2. Limitation of places/selection of students at institutional level for all or almost all fields of study
3. Free Access = with regulations for prior qualifications: secondary school leaving certificate, entrance exam (?) to almost all fields
4. Free access combined with institutional input depending on field

EUA Autonomy Report:











1. Access, free access, numerus clausus
2. HEI set add. selection criteria = Basic requirements set by government (secondary school leaving certificate) + additional criteria defined by HEI
3. Special quotas = No quotas, state sets quotas, university sets quotas

Country-by-country overview, as it was in 2007/2008

| Country | National Access/student selection system/determination of number of students = autonomy of institutions to select students | National/ Institutional Policy for Recognition of Prior Learning as access Average: T2010 = 30% | National strategy/ legislation for widening participation | National strategy for Lifelong Learning | HEI strategy for Lifelong Learning Average: T2010 = 39% |
|--|---|--|--|---|--|
|  AT Austria | NRC: Free Access A: Free access, No quotas for specific groups of students KD: Open access combined with complex regulations | JPR: Developing strategy NRC: No, because of open access T2010 = 48% SR: Yellow | NRC: Open Access by law AS: legislation + funding | JPR: Yes NRC: No, problems with the relationship between institutional autonomy and LLL strategy | NRC: Yes T2010 = 16% of institutions have strategy |
|  BE-FR Belgium Wallonie | A: Free Access, No quotas for specific groups of students T2010: Incentives for WP | JPR: Yes T2010 = 22% SR: Green | NRC: Legislation and activities T2010: Plan for WP | JPR: Yes T2010: Yes | NRC: Yes T2010 = 30% of institutions have strategy |
|  BE-NL Belgium Vlaanderen | A: Free Access, No quotas for specific groups of students T2010: Incentives for WP | JPR: Yes T2010 = 86% SR: Green | NRC: Yes, strategy for WP T2010: Plan for WP AS: regional legislation + funding | NRC: Yes JPR: Yes | NRC: No info T2010 = 67% of institutions have strategy |
|  BG Bulgaria | A: Student numbers decided by state, HEI set add. selection criteria, HEI sets quotas KD: Limitation of places/selection of students at institutional level | JPR: Developing strategy T2010 = 0% SR: Light green | NRC: No info | JPR: Developing strategy NRC: No info | NRC: No info T2010 = 75% of institutions have strategy |
|  CH Switzerland | A: Free Access, state set quota for specific groups | NRC: No national regulations, but institutional practices T2010 = 44 % SR: Yellow | NRC: No info | NRC: No | NRC: Yes T2010 = 19% of institutions have strategy |
|  CY Cyprus | A: HEI negotiate student numbers with government, state set quotas for specific groups KD: Limitation of places/selection of students at national/regional level for all or almost all fields of study (numerus clausus) | JPR: Developing strategy T2010 = 0% SR: Red | No info | JPR: Yes | NRC: No info T2010 = 36% of institutions have strategy |
|  CZ Czech Republic | A: HEI can decide on number of fee-paying students, HEI set add. selection criteria KD: Limitation of places/selection of students at institutional level for all or almost all fields of study | JPR: Developing strategy NRC: No T2010 = 10% SR: orange | NRC: Yes AS: legislation + funding | JPR: Yes NRC: Yes | NRC: No T2010 = 67% of institutions have strategy |
|  DE Germany | A: Limited open access, HEI negotiate student numbers with government, HEI sets quotas KD: Open access combined with complex regulations | JPR: No general validation system NRC: Yes, in ANKOM project T2010 = 40% SR: Light green | NRC: Yes AS: Reform of access regulations to HEIs, social dimension action plan + funding | JPR: Yes NRC: No – not for HEI and not for all | NRC: No T2010 = 12% of institutions have strategy |

| Country | National Access/student selection system/determination of number of students = autonomy of institutions to select students | National/ Institutional Policy for Recognition of Prior Learning as access Average: T2010 = 30% | National strategy/ legislation for widening participation | National strategy for Lifelong Learning | HEI strategy for Lifelong Learning Average: T2010 = 39% |
|---|--|--|--|---|---|
|  Denmark | A: HEIs can decide on student numbers, no quotas for specific groups of students, to some extent HEIs can set add. selection criteria, KD: Limitation of places/selection of students at institutional level | JPR: Yes NRC: Yes T2010 = 25% SR: Green | NRC: No T2010 site-visit: Yes AS: legislation + funding | JPR: Yes NRC: Yes | NRC: Yes T2010 = 50% of institutions have strategy |
|  Estonia | A: HEI can decide on student numbers, HEI set add. selection criteria No quotas for specific groups of students KD: Limitation of places/selection of students at institutional level for all or almost all fields of study | JPR: Developing strategy NRC: No info T2010 = 40% SR: Light green | NRC: No info AS: legislation + funding | JPR: Yes NRC: No info | NRC: No info T2010 = 40% of institutions have strategy |
|  Greece | A: HEI negotiate student numbers with government, state set quotas for specific groups KD: Limitation of places/selection of students at national/regional level | JPR: Developing strategy NRC: No, but planned discussions T2010 = 0% SR: Orange | NRC: Yes, but HEI don't want WP because of a great number of inactive students | JPR: Yes NRC: Yes | NRC: Yes T2010 = 36% of institutions have strategy |
|  Spain | A: Free Access, university sets quotas in certain fields HEI sets quotas KD Limitation of places/selection of students at national/regional level for all or almost all fields of study (numerus clausus) | JPR: Developing strategy NRC: No but planned for the non-university sector T2010 = 20% SR: Green | NRC: No policy AS: regional legislation + funding | JPR: Yes NRC: No | NRC: Yes T2010 = 40% of institutions have strategy |
|  Finland | A: HEI negotiate student numbers with government, university sets quotas, HEI set add. selection criteria, HEI sets quotas KD: Combination of limitation of places/ selection of students at national and institutional level | JPR: Yes NRC: No, but planned. Recommendations made T2010 = 33% SR: Green | NRC: Yes WP concerns both incentives to attract younger students, immigrants and foreign students AS: legislation + funding | JPR: Yes NRC: Yes | NRC: Yes T2010 = 58% of institutions have strategy |
|  France | NRC: Free access for universities A: Free access, No quotas for specific groups of students KD: Open access combined with complex regulations | JPR: Yes NRC: Yes, part of the LLL agenda T2010 = 34% SR: Green | NRC: Yes, possibilities to improve financial conditions | JPR: Policy in place, but considered a strategy NRC: Yes | NRC: Yes T2010 = 60% of institutions have strategy |
|  Croatia | A: University can decide on student numbers, HEI set add. selection criteria, HEI sets quotas | JPR: No validation system T2010 = 0% SR: Yellow | No info | JPR: Yes | No info |
|  Hungary | A: HEI negotiate student numbers with government, HEI sets quotas KD: Government limitation of places/ | JPR: No validation system, but one in progress NRC: Yes, formal, employment and life experiences T2010 = 10% | NRC: Yes, mentor programme and financial support system AS: legislation + funding | JPR: Yes NRC: Yes | NRC: Yes T2010 = 35% of institutions have strategy |
|  Ireland | A: HEI can decide on student numbers, university sets quotas, HEI set add. selection criteria KD: Limitation of places/selection of students at institutional level | JPR: Yes NRC: Yes T2010 = 85% SR: Green | NRC: Yes, 4 target groups: soc.-eco disadvantaged, students with disabilities, mature students, ethnic minorities | JPR: Updating the LLL strategy NRC: Yes, the strategy is being updated to make better use of the LLL tools | NRC: Yes, all HEIs involved in LLL T2010 = 60% of institutions have strategy |
|  Iceland | A: Free Access, HEI negotiate student numbers with government, HEI set add. selection criteria, No quotas for specific groups of students KD: Free Access = with regulations for prior qualifications: secondary school leaving certificate, entrance exam (?) to almost all fields | JPR: Developing strategy NRC: Will be included in strategy T2010 = 67% SR: Green | NRC: Yes, linked to RPL | JPR: Policy in place, but considered a strategy NRC: Yes | NRC: Yes T2010 = 33% of institutions have strategy |
|  Italy | A: Free Access, HEI sets quotas KD: Open access combined with complex regulations | JPR: Developing strategy NRC: No T2010 = 3% SR: Light green | NRC: No | JPR: Policy in place, but considered a strategy NRC: No strategy | NRC: No T2010 = 43% of institutions have strategy |
|  Latvia | A: HEI can decide on number of fee-paying students, HEI sets quotas KD: Limitation of places/selection of students at institutional level for all or almost all fields of study | JPR: Developing strategy NRC: Will be included in strategy T2010 = 13% SR: Yellow | NRC: Yes, but it only marginally mentions higher education | JPR: Yes NRC: Yes, but it only marginally mentions higher education | NRC: Yes, HEI interested in developing LLL even without a policy T2010 = 38% of institutions have strategy |
|  Lithuania | A: HEI can decide on number of fee-paying students, state set quotas for specific groups KD: Limitation of places/selection of students at institutional level for all or almost all fields of study | JRC: No validation system NRC: HEI have their own system T2010 = 39% SR: Orange | NRC: No | JPR: Yes NRC: In principle the strategy covers both | NRC: No T2010 = 61% of institutions have strategy |
|  Luxembourg | A: HEI can decide on student numbers, university sets quotas, HEI set add. selection criteria KD: Limitation of places/selection of students at national/regional level for all or almost all fields of study (numerus clausus) | JPR: Developing strategy NRC: Yes T2010 = 0% SR: Green | NRC: No | JPR: Policy in place, but considered a strategy NRC: No strategy | NRC: No – too early T2010 = 0% of institutions have strategy |
|  Malta | A: Free Access, no quotas for specific groups of students KD: Free Access = with regulations for prior qualifications: secondary school leaving certificate, entrance exam (?) to almost all fields | JPR: Validation system = The Malta Qualifications Council T2010 = 100 % | + WP, WP for equity | JPR: Policy in place, but considered a strategy | No info |
|  The Netherlands | A: Free Access, No quotas for specific groups of students KD: Free Access to almost all fields of study | JPR: Yes NRC: Yes T2010 = 53% SR: Green | NRC: New incentives to attract/include disabled students and non-Western immigrants AS: legislation + funding | JPR: Policy in place, but considered a strategy NRC: Yes, but universities not really involved except for OU | NRC: No, except OU T2010 = 17% of institutions have strategy |
|  Norway | A: Student number decided by state, HEI set add. selection criteria, state set quotas for specific groups KD: Cannot decide on number of students, state sets quotas | JPR: Yes NRC: Yes T2010 = 75% SR: Green | NRC: Student loans and grants gives possibilities for WP New legislation for setting up agency for WP AS: legislation + funding | JPR: Yes NRC: White paper. Open University set up in 1998. LLL is defined as core activity in law of 2005. | NRC: HEIs in Norway supports the Open University (appoint board members) and many institutions have a lot of LLL activities. T2010 = 40% of institutions have strategy |
|  Poland | A: HEI can decide on student numbers, no quotas for specific groups of students KD: Limitation of places/selection of students at institutional level | JPR: Developing strategy NRC: No T2010 = 4 % SR: Yellow | NRC: Yes, creating HEIs in remote areas to bring education to non-urban areas and incentives to admit disabled students AS: legislation + funding | JPR: Developing strategy NRC: Is expected to be developed in 2010 | NRC: Yes, in 60% of university-level HEIs T2010 = 47% of institutions have strategy |

Appendix 6

| Country | National Access/student selection system/determination of number of students = autonomy of institutions to select students | National/ Institutional Policy for Recognition of Prior Learning as access Average: T2010 = 30% | National strategy/ legislation/ funding for widening participation | National strategy for Lifelong Learning | HEI strategy for Lifelong Learning Average: T2010 = 39% |
|--|---|---|---|--|--|
|  PT Portugal | A: HEI can decide on number of fee-paying students, HEI set add. selection criteria, state sets quotas for specific groups KD: Limitation of places/selection of students at national/regional level for all or almost all fields of study (numerus clausus) | JPR: Yes NRC: No info T2010 = 80% SR: Green | NRC: No info AS: legislation + funding | JPR: Policy in place, but considered a strategy NRC: No info | NRC: No info T2010 = 40% of institutions have strategy |
|  RO Romania | A: HEI can decide on number of fee-paying students, HEI set add. selection criteria, state set quota for specific groups KD: Limitation of places/selection of students at institutional level for all or almost all fields of study | JPR: Developing strategy NRC: No info T2010 = 3% SR: Green | NRC: No info | JPR: Developing strategy NRC: No info | NRC: No info T2010 = 42% of institutions have strategy |
|  RS Serbia | A: HEI can decide on number of fee-paying students, state set quota for specific groups | No info SR: Orange | No info | No info | No info |
|  RU Russia | No info, HEI set add. selection criteria | No info T2010 = 25 % SR: Orange | No info | No info | No info T2010 = 63% of institutions have strategy |
|  SE Sweden | A: HEI negotiate student numbers with government, HEI set add. selection criteria, no quotas for specific groups of students KD: Combination of limitation of places/ selection of students at national and institutional level | JPR: Developing strategy NRC: Yes, is widely used by HEIs T2010 = 35% SR: Green | NRC: A policy, requiring each HEI to work and report on widening participation AS: legislation + funding | JPR: Yes NRC: The system is already an LLL system, no need for a strategy | NRC: Yes T2010 = 35% of institutions have strategy |
|  SL Slovenia | A: HEI negotiate student numbers with government, university propose quotas, HEI set add. selection criteria KD: Combination of limitation of places/ selection of students at national and institutional level | JPR: Developing strategy NRC: Yes T2010 = 0% SR: Green | NRC: NA AS: legislation + funding | JPR: Strategy NRC: Yes | NRC: Yes T2010 = 25% of institutions have strategy |
|  SK Slovakia | A: HEI negotiate student numbers with government, HEI set quotas, HEI set add. selection criteria | JPR: Developing strategy NRC: Developing strategy T2010 = 7% SR: Red | NRC: Included in LLL strategy AS: legislation + funding | JPR: Yes NRC: Yes | NRC: Yes T2010 = 50% of institutions have strategy |
|  TR Turkey | A: Student numbers decided on by state and selection done by state KD: Limitation of places/selection of students at national/regional level for all or almost all fields of study (numerus clausus) | JPR: No validation system NRC: No info T2010 = 18% SR: Red | NRC: No info | JPR: Developing strategy NRC: No info | NRC: No info T2010 = 44% of institutions have strategy |
|  UK - EWN United Kingdom – England, Wales, Northern Ireland | A: HEI negotiate student numbers with government, HEI set add. selection criteria, no quotas for specific groups of students KD: Overall numbers determined by government, but selection of students at institutional level | JPR: Developing strategy NRC: HEIs can set different criteria for recognition of prior learning to gain access T2010 = 75% SR: Green | NRC: Aim higher AS: legislation + funding | JPR: Yes NRC: Yes | NRC: Yes, for most institutions T2010 = 64% of institutions have strategy |
|  UK United Kingdom - Scotland | No info | JPR: No info NRC: Yes, developed and published guidelines for RPL T2010 = 92% SR: Green | NRC: Yes, well developed and has been extended to soc.-eco- disadvantaged students Will include financial incentives AS: legislation + funding | JPR: Yes NRC: Yes | NRC: Yes LLL is a priority for all HEIs T2010 = 69% of institutions have strategy |

Appendix 7

Russian site visits – An example of implementation

Given the overall goal of the *Trends 2010* report and its focus on the past decade, it was thought important to demonstrate how, despite the different contextual and policy frameworks, the same pressures and focus on Bologna implementation (albeit to varying degrees) are at play in non-EU member states. Two Russian universities were included for the first time in the Trends site visits: the People Friendship University of Russia (PFUR) and the Higher School of Economics (HSE). Given the large number of HEIs in Russia, the analysis of Bologna implementation cannot make any claim to national representativeness. It is hoped, however, that the following summary of the report written by Lars Ekholm, Riitta Pyykkö, and Christian Schneijderberg will shed interesting light on a vast and important country in Europe.

The general context

There are three different types of public or private higher education institution in Russia: academies, universities and institutes. Half of the state institutions are universities, and almost 95 % of private HEIs are other types of HEIs that are owned by private or public organisations and do not receive any state subsidies. Private HEIs account for nearly half of all HEIs, but enrol approximately only 18 % of students. Students in public institutions are either state-supported or fee-paying while all students pay tuition fees in private institutions.

The same kind of overarching policies to manage the system as a whole are in operation in Russia as in many other European countries, such as, for instance, the recent efforts to merge HEIs, sharpen their profiles and concentrate research funding. Thus, plans are underway to reduce the number of HEIs and especially their branches, which are considered to offer low quality education. The figures collected in June 2009 show

that the number of institutions has slightly decreased from 1423 in 1 January 2008 to 1352 HEIs today.

Recently, there has been much discussion about merging existing institutions in order to establish more competitive world class universities: there will be 10-15 national research universities (HSE is one of them), which will focus on the high-tech sector of the economy. The first two, the Siberian Federal University and the Southern Federal University, were established in 2006, and five more federal universities were established in October 2009.

Russian higher education institutions award three types of degrees and two types of postgraduate degrees: Bachelor, Master, Specialist, Kandidat Nauk (“candidate of sciences”), and Doktor Nauk (“Doctor of sciences”). In addition, Diplomas of Incomplete Higher Education are also awarded for at least two years of higher education in a Bachelor or Specialist programme thus reflecting the Russian tradition of continuing education, which fits in with Bologna concepts of lifelong learning.

Students normally enter higher education institutions at the age of 17. The relatively young age of the students is often given as one explanation for the regulated form of studies, the four-year Bachelor, low student involvement in decision-making bodies, and the formal relationship between teachers and students. Student unions have a social function. This does not exclude that students meet the rector and that they sit on certain university bodies.

Admission to higher education was formerly based on the Certificate of secondary education and entrance exams. In 2001, the Uniform State Examination (EGE) was introduced to increase equity, and in 2009 it became compulsory in all regions of Russia. EGE is a single, nationwide, standardised set of exams and can be taken in several subjects. Russian language and mathematics are compulsory. The purpose of the EGE is to unify the exams taken at the end of

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general education and to replace entrance examinations for mid-level professional and higher education institutions.

The four-year Bachelor's degree is offered in all disciplines with the exception of medicine. It prepares students for studies at Master's level, but also gives access to the labour market. In practice, only a very limited number of graduates (2-5%) enter the labour market, around 85-88% continue for a Specialist degree (five years), 10% continue for a Master's degree (two years). Although the Bachelor's and Master's degrees were introduced in 1992, the traditional Specialist degree has remained by far the most popular one.

Admission procedures to postgraduate education differ; examinations as well as interviews are used. Completing a Kandidat Nauk degree takes three years of study after the Specialist or Master degree. Doktor Nauk is a higher postgraduate degree and takes a minimum of three years to complete after a Kandidat Nauk in the same field. The duration is not strictly determined.

All study areas and specialisations with state accreditation are centrally controlled. There are State Educational Standards which cover, for instance, the number of hours per course, divided into contact hours and seminar work; the content of study; number of weeks of professional training; thesis writing, etc. The State Educational Standards for Higher Education are divided into federal standards, regional standards, and institutional standards. The institutions may decide on about 15%-30% of the curriculum. New standards will be introduced in 2010. It will give institutions more autonomy and the students more electives since the state standard component will cover only 50%-60% of the curriculum. Thus, the Russian higher education has been managed in quite a centralised manner and the 2010 version still gives central authorities the right to decide on about half of curricular contents.

The Russian credit system does not fully comply with ECTS, although 60 credits

is also the average student workload per year in Russia, but the student workload is higher than in most other Bologna countries. The students' workload in Russian HEIs should not exceed 54 hours per week, and approximately half of this is contact hours and the rest independent work. There are 40 study weeks per year, which means that the annual workload of the students is more than 2000 hours. According to the 2009 Russian National report on Bologna reforms, 50%-75% of all programme components are based on ECTS.

The place of academies seems to be unchanged. A big share of research money goes to the academies, which explains that a university with 30% of its budget earmarked for research (such as HSE) is regarded as a highly research-oriented institution. However, the importance of the academies is starting to be questioned and if Russia starts reforming the third cycle along Bologna lines, this might result in a collision of interests between the HEIs and the academies.

How internationally oriented is the Russian higher education system? Russia is perceived as having a well-functioning system that does not require it to get involved with other national systems although the universities that were visited were quite internationally oriented. Both of them have a number of dual programmes (even if they complain about Russian law making it impossible to set up joint programmes). Foreign language skills certainly vary enormously but there seem to be sharpened demands for proficiency in foreign languages.

Bologna Implementation

Officially the Bologna Process is a guiding principle for the Russian higher education system. However, seen from a national point of view, the process is quite slow and it is difficult to describe the situation in exact numbers. According to one source, about 9 % of all students were enrolled in two-cycle degree programmes in 2008/2009 (BFUG report). The lion's share of Russian students follow a specialist programme. These and

other estimates indicate that Russia applies the Bologna concept in a rather ambiguous way, even if the number of students is large due to the huge size of the system.

This means that the two institutions under study here cannot be seen as typical of the Russian situation. Not only are they considered as elite institutions but they are both committed to the Bologna Process and implemented the Bachelor/Master structure many years ago.

The site-visits

The findings of the site visits can be summarised as follows: the infrastructure for Bachelor/Master is in place, but the transformation of contents and teaching/learning methods are still to be achieved; the 3rd cycle has not yet been affected. In addition, only parts of HEIs so far follow the Bachelor/Master structure, and the Specialist degree is still in operation and can be combined with the Bachelor. This gives a certain flexibility to the system.

Excessive assessing of the students seems to be a characteristic at the two institutions (and this is obviously a national feature). The students are assessed after courses and semesters, and at the end of studies through a state exam. These procedures did not seem to be challenged but the state examination had a less good reputation.

There was some conflicting information regarding the acceptance of the Bachelor by employers: one institution noted that Bachelors do get jobs, while staff at the other institution mentioned difficulties.

The process of reforming the 3rd cycle has started, with one of the universities having taken more steps in this respect than the other. Senior managers at one university were well aware of the need to modernise PhD studies, but obviously met some resistance related to tradition and funding. A problem that the universities have in common is the financial support of their research students. Also, the position of Doktor Nauk in comparison to a Western PhD seems to pose a problem for Russia.

One of the two institutions has developed a new mission and strategy that emphasise internationalisation, mid-term development projects, a system of indicators for every vice-rector, competence-based curricula, a move to paperless administration and the introduction of tutors. In general, the Bologna Process has supported these changes, although the implementation of Bologna has been limited to its basic building blocks (degree structure, credit units, Diploma Supplement).

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