European Commission
Directorate-General
for Education and Culture

Trends 2003
Progress towards the European Higher Education Area

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Bologna four years after:
Steps toward sustainable reform
of higher education in Europe

A report prepared for the European University Association
by Sybille Reichert and Christian Tauch

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PREFACE

EUA is pleased to present the third report on trends in higher education in Europe, prepared with the support of the European Commission through the Socrates Programme, on the occasion of the September 2003 Berlin Ministerial Conference to discuss next steps in the Bologna Process.

Four years after the launch of the Bologna Process we have entitled this third report "TRENDS 2003: Progress towards the Higher Education Area". We have chosen this title as the report concentrates not only on changes in learning structures in Europe, but for the first time analyses and compares developments from the point of view of all the major actors in the process: governments, national rectors' conferences, higher education institutions and students. The report reflects the views of these different stakeholders on the Bologna Process as a whole, and on its different "action lines", in terms of implementation, problems encountered and challenges for the future.

EUA decided to widen the scope of the report, in comparison to those prepared for the Bologna and Prague Conferences respectively, in order to underline the growing importance of the full support and involvement of higher education institutions and students in the implementation of the process. The enthusiastic response of higher education institutions to the questionnaires sent out early in 2003 confirmed the validity of this approach and enabled the authors, Sybille Reichert and Christian Tauch, to analyse the views of institutions and to compare their responses to those of the other players.

Therefore the report looks not only at policy developments and changes in structures at national level but also reflects institutional positions and the views of students. It concludes that the realisation of the European Higher Education Area will only be possible if higher education institutions and their staff and students subscribe to its aims and implement the different objectives. Therefore a particular challenge for the next phase of the process will be to ensure that Bologna, now that the majority of institutional leaders are convinced of its importance, reaches out to include the essential actors, the academics who are responsible for teaching and research in their daily lives, the administrative staff and the students. It is only in this way that the change process, initiated across Europe, will become embedded in the institutions and thus be implemented in an innovative and sustainable way. This reality will guide EUA's action in the coming years.

In addition, we have learned that the Bologna reforms, if they are to be meaningful at institutional level, have to be integrated into the other core functions and development processes of Europe's higher education institutions, and should not be pushed forward at the expense of other urgent innovations and reforms. These and the Bologna reforms also need to be considered as a package at institutional level. All this will require the highest level of leadership, quality and strategic management inside each institution. Above all, the message is that Europe's universities stand firmly behind the Bologna Process. Much has been achieved over the last four years since 1999, but in order to ensure sustainable reform it will be important to allow enough time for institutions to transform legislative changes into meaningful academic aims and institutional realities. Supporting institutions in this process will be EUA's key objective as the association too moves forward into the next phase of the process.

Eric Froment
President, EUA

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ACKNOWLEDGEMENTS

1. EXECUTIVE SUMMARY

AIMS OF THE STUDY

This study aims to capture the most important recent trends related to the Bologna reforms. It is a follow-up to the two *Trends reports* which were written for the Bologna Conference in 1999 and the Prague Conference in 2001. Unlike the two first reports, which were mainly based on information provided by the ministries of higher education and the rectors' conferences, *Trends 2003* tries to reflect not only these two perspectives but also those of students, employers and, most importantly, the HEIs themselves, thus giving a fairly comprehensive picture of the present phase of the Bologna Process. If the EHEA is to become a reality, it has to evolve from governmental intentions and legislation to institutional structures and processes, able to provide for the intense exchange and mutual cooperation necessary for such a cohesive area. This means that higher education institutions are heavily and directly involved in the development of viable interpretations of concepts which were and are sometimes still vague, even in the minds of those who use these concepts most often. Concrete meaning needs to be given to:

- the term "employability" in the context of study programmes at Bachelor level;
- the relation between the new two tiers;
- workload-based credits as units to be accumulated within a given programme;
- curricular design that takes into account qualification descriptors, level descriptors, skills and learning outcomes;
- the idea of flexible access and individualised learning paths for an increasingly diverse student body;
- the role of higher education inserting itself into a perspective of lifelong learning;
- the conditions needed to optimise access to mobility; and last but not least, to
- meaningful internal and external quality assurance procedures.

We may thus assert from the outset that this study emphasises the need for complementarity between the top-down approach applied so far in the Bologna Process, with the emerging bottom-up process in which higher education institutions are already playing and should continue to play a key role - as expected of them by the ministers when they first met in Bologna. Institutional developments in line with the objectives of the Bologna Process are not only emerging rapidly, but also represent challenges worthy of our full attention, as this study hopes to prove.

AWARENESS AND SUPPORT OF THE BOLOGNA PROCESS

Awareness of the Bologna Process has increased considerably during the last two years. Nevertheless, the results of the *Trends 2003 survey* and many other sources suggest that, despite this growing awareness among the different HE groups, the reforms have yet to reach the majority of the HE grass-roots representatives who are supposed to implement them and give them concrete meaning. Deliberations on the implementation of Bologna reforms currently involve heads of institutions more than the academics themselves. Hence, interpreting Bologna in the light of its goals and the whole context of its objectives at departmental level, i.e. rethinking current teaching structures, units, methods, evaluation and the permeability between disciplines and institutions, is a task that still lies ahead for a majority of academics at European universities. Administrative staff and students seem so far to be even less included in deliberations on the implementation of Bologna reforms. Generally, awareness is more developed at universities than at other higher education institutions. In Estonia, Lithuania, Sweden, Germany, Ireland and most strongly the UK, deliberations on institutional Bologna reforms are even less widespread than in the other Bologna signatory countries. This does not mean, of course, that no reforms are being undertaken, but that if there are reforms they are not explicitly associated with the Bologna Process. In the case of Sweden, for instance, reforms along the lines of the Bologna Process are often not carried out in the name of Bologna.

In the light of the scope of the Bologna reforms, which involve not only all disciplines but different groups of actors in the whole institution, it should be noted that only 47% of universities and only 29,5% of other HEIs have created the position of a Bologna coordinator.

There is however **widespread support for the Bologna Process among heads of HEIs.** More than two thirds of the heads of institutions regard it as essential to make rapid progress towards the EHEA, another 20% support the idea of the EHEA but think the time is not yet ripe for it. However, some resistance to individual aspects and the pace of the reforms obviously remains. Such resistance seems to be more pronounced in Norway, France, the French-speaking community of Belgium, Germany, Hungary, Portugal, Ireland and the UK. Though some South East European (SEE) countries have not yet formally joined the Bologna Process, they already take it as a reference framework and actively promote its objectives.

THE ROLE OF HEI IN THE BOLOGNA PROCESS

While being mostly supportive of the Bologna process, 62 % of university rectors and 57% of heads of other HEIs in Europe feel that institutions should be involved more directly in the realisation of the Bologna objectives.

Moreover, 46% of HEI leaders find that their national legislation undermines autonomous decision-making – at least in part. Particularly in Belgium, Denmark, France, Germany, Greece, Hungary, Poland, Portugal, the Slovak Republic, Slovenia, Spain, Sweden and SEE, higher education representatives and rectors' conferences point to the limits of autonomous decision-making by institutions.

While many governments have made considerable progress with respect to the creation of legal frameworks which allow HEIs to implement Bologna reforms, only half of them seem to have provided some funding to the HEIs for these reforms. **The lack of financial support for the Bologna reforms is highlighted by nearly half of all HEIs of the Bologna signatory countries.** This means that the Bologna reforms are often implemented at the cost of other core functions or essential improvements. 75% of all heads of HEIs think clear financial incentives for involvement in the Bologna reforms should be provided. Obviously, the dialogue between rectors and academics, institutions and ministry representatives has to be intensified, beyond the reform of legislation, including both the implications of Bologna reforms at institutional level and the State support needed to foster these reforms, without detriment to other core functions of higher education provision.

THE ROLE OF STUDENTS IN THE BOLOGNA PROCESS

At 63% of universities in Bologna signatory countries, students have been formally involved in the Bologna Process, through participation in the senate or council or at faculty/departmental level. The same trend is valid for the non-signatory countries in SEE.

A significantly lower degree of formal participation in the Bologna Process at institutional level can be noted in Greece, Portugal, Slovenia, Iceland and the UK. Half of the students, as represented by their national and European student associations, feel they are playing a very or reasonably active role in the construction of the European Higher Education Area. At institutional and particularly at departmental level, the inclusion of students in the deliberations concerning a qualitative reform of teaching and learning structures, methods and evaluation in the spirit of the Bologna Declaration still leaves considerable room for improvement.

Student representatives express the highest hopes concerning the principles of the Bologna reforms and the harshest criticism concerning their implementation and frequently reductive interpretations. The students' contribution to the deliberations on the Bologna reforms has been particularly strong on issues of the social dimension of higher education and the emphasis of HE as a public good, and in connection with discussions of the possible consequences of GATS on higher education institutions. Students have also continuously stressed the values of student-centred learning, flexible learning paths and access, as well as a realistic, i.e. empirically-based, estimation of workload in the context of establishing institution-wide credit systems.

ACADEMIC QUALITY AND GRADUATE EMPLOYABILITY AS COMPATIBLE AIMS

Enhancing academic quality and the employability of graduates are **the two most frequently mentioned driving forces behind the Bologna Process** according to the representatives of ministries, rectors' conferences and higher education institutions.

A remarkable consensus has been reached at institutional level on the value of the employability of HE graduates in Europe: 91% of the heads of European higher education institutions regard the employability of their graduates to be an important or even very important concern when designing or restructuring their curricula. However, **regular and close involvement of professional associations and employers in curricular development still seems to be rather limited**. HEIs should be encouraged to seek a close dialogue with professional associations and employers in reforming their curricula. However, fears of short-sighted misunderstandings of the ways in which higher education should aim at employability and relevance to society and the economy have re-emerged frequently in the context of comparing and redesigning modules or degree structures. To do justice to the concerns of stakeholders regarding the relevance of higher education and the employability of HE graduates, without compromising the more long-term perspective proper to higher education institutions and to universities in particular, may well be the most decisive challenge and success-factor of Bologna-related curricular reforms. It should be noted that the growing trend towards structuring curricula in function of the learning outcomes and competences, is often seen as a way to ensure that academic quality and long-term employability become compatible goals of higher education. This understanding has also been the basis for the project "Tuning Educational Structures in Europe" in which more than 100 universities have tried to define a common core of learning outcomes in a variety of disciplines.

PROMOTION OF MOBILITY IN EUROPE

While outgoing and incoming **student mobility has increased** across Europe, incoming mobility has grown more in the EU than in the accession countries. **A majority of institutions report an imbalance of outgoing over incoming students**. Net importers of students are most often located in France, The Netherlands, Denmark, Sweden and, most strongly, in Ireland or the UK where 80% of the institutions report an imbalance of incoming over outgoing students.

Teaching staff mobility has increased over the last three years at a majority of higher education institutions in more than two thirds of the signatory countries.

Public funds for mobility have been increased in the majority of EU countries but only in a minority of accession countries. However, the number and level of mobility grants for students is not sufficient to allow for equal access to mobility for those from financially less privileged backgrounds.

Comparable and European-wide data on all mobility (including free movers), including students' financial and social conditions, **is urgently needed** in order to allow monitoring of any progress in European mobility and benchmarking with other regions in the world.

ATTRACTIVENESS OF THE EHEA AND THE NATIONAL HE SYSTEMS

Enhancing the attractiveness of the European systems of higher education in the non-European world is **a third driving force of the Bologna Process**, ranked by *Trends III* respondents after **improving academic quality and preparing graduates for a European labour market. The EU is by far the highest priority area for most institutions** (mentioned by 92%). The second priority area is Eastern Europe (62%), followed by US/Canada (57%), Asia (40%), Latin America (32%), Africa and Australia (24% and 23%) and the Arab World (16%). In some European countries, the priorities diverge considerably from this ranking, notably in the UK, Spain, Germany and Romania where Europe is targeted significantly less often.

In order to promote their attractiveness in these priority areas, joint programmes or similar co-operation activities are clearly the preferred instrument (mentioned by three quarters of all HEIs). **Only 30% of HEIs mention the use of targeted marketing for recruiting students,** with the notable exceptions of Ireland and the UK where more than 80% of universities conduct targeted marketing.

A majority of countries have developed national brain drain prevention and brain gain promotion policies. Most HEIs still have to define their own institutional profiles more clearly in order to be able to target the markets which correspond to their priorities. In light of the competitive arena of

international student recruitment, HEIs will not be able to avoid targeted marketing techniques if they want to position themselves internationally, even if such efforts may go against the grain of established academic culture and habits.

HE AS A PUBLIC GOOD

A large consensus appears to exist in the emerging EHEA regarding **Higher Education as a public good and a public responsibility**. It is widely recognised that social and financial support schemes, including portable grants and loans, and improved academic and social counselling are conditions for wider access to higher education, more student mobility and improved graduation rates.

However, the conflict between cooperation and solidarity, on the one hand, and competition and concentration of excellence, on the other, is currently growing as HEIs are faced with decreasing funds. Higher education institutions can try to combine widened access, diversified provision and concentration of excellence, but often have to pursue one option to the detriment of the others. In competing with other policy areas for public funding, HEIs still have to convince parliaments and governments of the vital contribution of HE graduates and HE-based research to social and economic welfare.

HE IN THE GATS

Only one third of the ministries have developed a policy on the position of **Higher Education in the World Trade Organisation's General Agreement on Trade in Services (GATS)**, while two thirds have not. The situation is similar for the rectors' conferences. Only 20% of HEI leaders declared themselves to be fully aware of the GATS negotiations, almost half of these leaders considered themselves to be aware without having specific details, and 29% said they were *not yet aware* of GATS, with considerable differences between countries.

Students' associations seem to be well aware of GATS and the threats posed by the further inclusion of HE in the on-going negotiations. There is a consensus that more transparency and consultation of higher education representatives is needed in the ongoing and future GATS negotiations.

To meet the internationalisation challenges, there is a growing need for enhanced quality assurance procedures and regulatory frameworks, also given the emergence of many private for-profit institutions in Europe.

DEGREE STRUCTURES, QUALIFICATION FRAMEWORKS AND CURRICULA

Regarding the introduction of study structures based on undergraduate and graduate tiers, important progress has been made in legal terms. Today, **80% of the Bologna countries either have the legal possibility to offer two-tier structures or are introducing these**. Many governments have fixed deadlines for the transition from the traditional to the new degree system. In the remaining 20% of countries, the necessary legislative changes are being prepared. The latter holds true also for SEE countries.

As for the HEIs, 53% have introduced or are introducing the two-tier structure while 36% are planning it. In other words, **almost 90% of HEIs in the Bologna countries have or will have a two-tier structure**. Only 11% of HEIs see no need for curricular reform in this process. About 55% of HEIs in SEE have not yet introduced the two-tier structure.

The need for more structured doctoral studies in Europe has been highlighted repeatedly in recent years. The traditional procedure of leaving doctoral students largely on their own and providing them with individual supervision only is no longer suited to the challenges of modern society and hampers the realisation of the European Higher Education Area.

Europe is divided in two halves regarding the organisation of these third-tier doctoral studies. In half of the countries, doctoral students receive mainly individual supervision and tutoring, while in the other half, taught doctoral courses are also offered in addition to individual work. HEIs still face the challenge of how to cooperate, with the support of governments, at doctoral level nationally

and across Europe, and whether or not this should involve **the setting-up of structured doctoral studies, particularly in interdisciplinary and international settings.**

Student support for the new degree structures clearly outweighs the reservations, but the risk of putting too much emphasis on "employability" still causes unease among a substantial number of student associations.

In countries where first degrees at Bachelor level have not existed in the past, there still appears to be a tendency to see these as a stepping stone or orientation platform, rather than as degrees in their own right. The perception of Bachelor degrees as valid and acceptable qualifications still leaves room for improvement.

Governments and HEIs will have to cooperate closely to **ensure that the implementation of the new degree structures is not done superficially**, but is accompanied by the necessary curricular review, taking into account not only the ongoing European discussions on descriptors for Bachelor-level and Master-level degrees, learning outcomes and qualification profiles, but also institution-specific needs for curricular reform.

To achieve the objective of a "system of easily readable and comparable degrees" within the European Higher Education Area, it will be essential that governments and HEIs use the next phase of the Bologna Process to **elaborate qualifications frameworks based on external reference points (qualification descriptors, level descriptors, skills and learning outcomes), possibly in tune with a common European Qualifications Framework**. The outcomes of the Joint Quality Initiative and the Tuning project may be relevant in this respect.

JOINT CURRICULA AND JOINT DEGREES

Joint Curricula and Joint Degrees are intrinsically linked to all the objectives of the Bologna Process and have the potential to become an important element of a truly European Higher Education Area. Nevertheless, and in spite of the appeal in the Prague Communiqué, joint curricula and joint degrees still do not receive sufficient attention, as is confirmed by the fact that most ministries and rectors' conferences attach only medium or even low importance to these. More than two thirds of the ministries claim to give some kind of financial incentive to the development of joint curricula/joint degrees but the extent of such support is not known.

While support for joint curricula and joint degrees is clearly higher among HEIs and students, these have not yet been recognised as core tools for institutional development. Their creation and coordination still appears to be left entirely to the initiative of individual professors.

HEIs and national higher education systems in the EHEA would lose an enormous opportunity to position themselves internationally if they were not to focus their attention more than before on systematic – including financial – support for the development of joint curricula/joint degrees. Of course, such support would entail amendments and changes in the existing higher education legislation of many countries, as **in more than half of the Bologna Process countries, the legislation does not yet allow the awarding of joint degrees**. It would also call for the elaboration of agreed guidelines and definitions for joint curricula/joint degrees, both at national and European level, and would rely on enhanced networking between the HEIs themselves.

RECOGNITION

About **two thirds of the Bologna signatory countries have so far ratified the most important legal tool for recognition, the Lisbon Recognition Convention**. The European Higher Education Area would benefit if this Convention were ratified by all Bologna signatory States as soon as possible.

Correspondingly, more than half of the academic staff are reported as being not very aware or not aware at all of the provisions of the Lisbon Convention. **Close cooperation** with the relevant ENIC/NARIC is reported by only 20% of HEIs, while 25% do not cooperate at all with their ENIC/NARIC. A further 28% of HEIs say they don't know what ENIC/NARIC is (or at least not under this name).

Thus **awareness of the provisions of the Lisbon Convention, but also of the ENIC/NARIC initiatives (recognition procedures in transnational education etc.) among academic staff and students needs to be raised**, through cooperation between international organisations, national authorities and HEIs. Moreover, the position of the ENIC/NARIC also needs to be strengthened in some countries.

Two thirds of the ministries, more than half of the HEIs and slightly less than 50% of the student associations expect that the Bologna Process will greatly facilitate academic recognition procedures. While HEIs are rather optimistic with regard to the smoothness of recognition procedures of study abroad periods, in many countries, however, institution-wide procedures for recognition seem to be quite under-developed, and the recognition of study abroad periods often takes place on a case-by-case basis. Even where formal procedures exist, students, as the primarily concerned group, often say they are unaware of these. Almost 90% of the students' associations reported that their members occasionally or often encounter recognition problems when they return from study abroad.

It is a positive sign that more than 40% of the students' associations indicated that appeal procedures for recognition problems were also in place in their members' institutions. But, clearly, more HEIs should be encouraged to **develop more and better institutional recognition procedures, and especially to intensify communication with students** on these matters.

The **Diploma Supplement** is being introduced in a growing number of countries, but the main target group - the employers - is still insufficiently aware of it. Awareness of the potential benefits of the Diploma Supplement therefore also needs to be raised. The introduction of a **Diploma Supplement label** (like that of an **ECTS label**) would probably lead to a clear qualitative improvement in the use of the Diploma Supplement.

CREDITS FOR TRANSFER AND ACCUMULATION

ECTS is clearly emerging as the European credit system. In many countries it has become a legal requirement, while other countries with national credit systems are ensuring their compatibility with ECTS.

Two thirds of HEIs today use ECTS for credit transfer, 15% use a different system. Regarding credit accumulation, almost three quarters of HEIs declare that they have already introduced it – this surprisingly high figure needs further examination and may result from an insufficient understanding of the particularities of a credit accumulation system.

The ECTS information campaign of the past years, undertaken by the European Commission, the European University Association and many national organisations, has yet to reach a majority of institutions where the use of **ECTS is still not integrated into institution-wide policies or guidelines,** and its principles and tools are often insufficiently understood.

The basic principles and tools of ECTS, as laid down in the **"ECTS Key Features" document**, need to be conveyed to academic and administrative staff and students alike in order to exploit the potential of ECTS as a tool for transparency. Support and advice is particularly needed regarding credit allocation related to learning outcomes, workload definition, and the use of ECTS for **credit accumulation**. The introduction of the ECTS label will lead to a clear qualitative improvement in the use of ECTS.

AUTONOMY AND QUALITY ASSURANCE

Increasing autonomy normally means greater independence from state intervention, but **is generally accompanied by a growing influence of other stakeholders in society, as well as by extended external quality assurance procedures and outcome-based funding** mechanisms. However, many higher education representatives stress that a release of higher education institutions from state intervention will only increase institutional autonomy and optimise the universities' innovative potential, as long as this is not undone by mechanistic and uniform ex post monitoring

of outputs, or by an overly intrusive influence of other stakeholders with more short-term perspectives.

All Bologna signatory countries have established or are in the process of establishing agencies which are responsible for external quality control in some form or another. 80% of HEIs in Europe already undergo external quality assurance procedures in some form or another (quality evaluation or accreditation). The **previous opposition between accreditation procedures in the accession countries and quality evaluation in EU countries seems to be softening**: a growing interest in accreditation and the use of criteria and standards can be observed in Western Europe, while an increasing use of improvement-oriented evaluation procedures is noted in Eastern European countries. Two recent comparative studies also observe a softening of opposition between institution- and programme-based approaches among QA agencies and an increasing mix of these two approaches within the same agencies.

The **primary function of external quality assurance** (quality evaluation or accreditation), according to the responsible agencies and the majority of HEIs, consists in **quality improvement**. Only in France, Slovakia and the UK, accountability to society is mentioned more frequently than quality improvement. Even accreditation agencies, traditionally more oriented toward accountability, have stressed improvement in recent years. Generally speaking, external quality procedures are evaluated positively by the HEIs. Most frequently, they are regarded as enhancing institutional quality culture. Higher education representatives, however, often observe that the effectiveness of the quality evaluation procedures will depend to a large extent on their readiness to consider the links between teaching and research and other dimensions of institutional management. As complex systems, universities cannot react to a problem seen in one domain without also affecting other domains indirectly. Likewise, the efficiency and return on investment in quality review processes will depend on the synergies and coordination between the various national and European accountability and quality assurance procedures, as well as the funding mechanisms in place across Europe.

Internal quality assurance procedures seem to be just as widespread as external ones and mostly focus on teaching. 82% of the heads of HEIs reported that they have internal procedures to monitor the quality of teaching, 53% also have internal procedures to monitor the quality of research. Only a quarter of the HEIs say they have procedures to monitor aspects other than teaching and research. At the moment, however, internal procedures are not yet developed and robust enough to make external quality assurance superflous.

Ministries, rectors' conferences, HEIs, and students all generally **prefer mutual recognition of national quality assurance procedures over common European structures**. However, the objects and beneficiaries (or "victims") of quality evaluation and accreditation, the higher education institutions themselves, are significantly more positively disposed toward common structures and procedures than the national actors. For instance, nearly half of higher education institutions say they would welcome a pan-European accreditation agency.

The ultimate challenge for QA in Europe consists in creating transparency, exchange of good practice and enough common criteria to allow for mutual recognition of each others' procedures, without mainstreaming the system and undermining its positive forces of diversity and competition.

LIFELONG LEARNING

Definitions of Lifelong Learning (LLL) and its relation to Continuing Education (CE) and Adult Education are still vague and diverse in different national contexts. Generally speaking, as far as the HE sector is concerned, LLL debates constitute the follow-up to the older debates on Continuing Education and Adult Education, sharing their focus on flexible access to the courses provided, as well as the attempt to respond to the diverse profiles and backgrounds of students. All of the recent definitions of LLL reflect an emphasis on identifying how learning can best be enabled, in all contexts and phases of life.

The need for national LLL policies seems to be undisputed, and was strongly pushed in the context of the consultation on the European Commission's Memorandum on LLL (November 2000). The *Trends 2003 survey* reveals that in 2003 the majority of countries either intend or are in the process of developing a LLL strategy. Such policies already exist in one third of Bologna signatory countries, namely in Belgium, Denmark, Finland, France, Iceland, Ireland, The Netherlands, Norway, Poland, Slovakia, Sweden and the UK.

Most of the policies and actions undertaken at European and national levels do not target the higher education sector as such, and do not address the particular added value or conditions of LLL provision at HEIs.

At institutional level, the UK, Iceland, France, the Czech Republic, the Slovak Republic and Bulgaria have the highest percentages of higher education institutions with LLL strategies, while Germany, Austria, Italy, Hungary, Turkey, Romania and other SEE countries have the lowest percentages.

A majority of student associations have observed changes in attitude to LLL over the last three years at institutions in their countries. Nearly half of the student representatives noted changes with respect to the courses offered to non-traditional students, while a third observed greater encouragement of LLL culture among students. Little change was observed with respect to teaching methodologies or access policies.

Most national LLL policies comprise two co-existing agenda of social inclusion, stressing flexible access and diversity of criteria for different learner profiles, and economic competitiveness, focusing on efficient updating of professional knowledge and skills. The latter dimension is often funded and developed in partnership with labour market stakeholders. If the competitiveness agenda is reinforced by tight national budgets and not counterbalanced by government incentives, university provision of LLL may well be forced to let go of the more costly social agenda.

The development of LLL provision reflects a clear market orientation and a well-developed dialogue with stakeholders. Two thirds of the European institutions provide assistance on request and respond to the expressed needs of businesses, professional associations and other employers. Nearly half (49%) actually initiate joint programmes, with considerably more institutions doing so in Finland, Iceland, Sweden, Norway, Estonia, France, Ireland and the UK. However, the inclination to respond directly to market needs is also one of the reasons for the critical attitude of many academics toward LLL units at higher education institutions, especially at universities.

European reforms of degree structures seem to affect LLL at many institutions. 39% of heads of institutions find that the implementation of new degree structures also affects the design of LLL programmes and modules.

With the exception of exchanging experience in major European networks of continuing education, European cooperation between institutions in LLL, e.g. for the sake of joint course development, is still the exception rather than the rule.

LLL provision is still generally marginalised, i.e. rarely integrated in the general strategies, core processes and decision-making of the institution. Even in those countries where CE or LLL has been playing an important political role and where incentives are provided to develop LLL, such as France, the UK and Finland, CE centers are not always recognised on an equal footing with the rest of university teaching and research. In order to position themselves in an expanding market and clarify the added value of their expertise, HEIs will have to make more of an effort to integrate LLL into their core development processes and policies.

DIVERSIFICATION OF INSTITUTIONAL PROFILES

Currently, a large majority of European higher education institutions are alike in the relative weight they attribute to teaching and research, and in the dominance of a national orientation regarding the community they primarily serve. Only 13% of all European HEIs (16% of universities) see themselves as serving a world-wide community (with large country divergences in this respect), while only 7% see themselves as primarily serving a European community.

Higher education institutions are facing an increasing need to develop more differentiated profiles, since the competition for public and private funds, as well as for students and staff, has increased in times of more intense internationalisation and even globalisation of parts of the higher education market. However, the readiness of HEIs to develop more differentiated profiles depends to a large extent on increased autonomy – which is only partially realised in Europe, as well as on funding mechanisms which allow for such profiling, and which are not yet in place in any European country.

A major challenge for the future consists in addressing the new needs which arise from the diversified body of immediate partners in teaching and research. Universities will not only have to decide what the limits of these partners' roles should be, in order to maintain their own academic freedom, but will also have to sell the "unique added value" of what the university's role and contribution to teaching and research can be, distinguishing themselves from other organisations which also offer teaching or research. Their learning structures and outcomes, with suitable supporting quality criteria, including their individual ways of relating academic quality to sustainable employability, will certainly become one of the prime ingredients of institutional positioning in Europe and the world.

2. INTRODUCTION: ON THE AIMS AND METHODOLOGY OF THIS STUDY

Four years after the Bologna Declaration, governments of all signatory countries have shown manifold evidence of legislative initiatives and attempts to realise the proposed Bologna reforms to which they had committed themselves in 1999 and 2001. They have initiated new procedures, fostered cooperation between national agencies, developed new policies, exchanged and adopted good practice. Already in 2001, the level and growth of Bologna-related activities at national levels were reported and welcomed by the ministers in the Prague Communiqué. But how are these initiatives accepted, interpreted and turned into reality at the level of the institutions? That is the question which is becoming more and more decisive as the outlines of the European Higher Education Area (EHEA) become clearer and expectations grow.

This study is supposed to capture the most important recent trends related to the Bologna reforms. It is a follow-up to the two *Trends reports* that were written for the Bologna Conference in 1999[1] and the Prague Conference in 2001[2]. Unlike the two first reports, which were mainly based on information provided by the Ministries of Higher Education and the rectors' conferences, *Trends 2003* tries to reflect not only these two perspectives but also those of students, employers and, most importantly, the HEIs themselves. *Trends 2003* is meant to give a fairly comprehensive picture of the present phase of the Bologna Process. If the EHEA is to become reality, it has to be transformed from governmental intentions and legislation into institutional structures and processes, providing for the intensity of exchange and mutual cooperation necessary for such a cohesive area. This means that higher education institutions are heavily and directly involved in the development of viable interpretations of concepts which were and sometimes are still vague, even in the minds of those who use these concepts most often. For instance, concrete meaning has to be given to:

- the term "employability" as an aim of a shorter first-degree cycle;
- the relation between the new two-tiers;
- workload-based credits as units to be accumulated within a given programme;
- the idea of flexible access and individualised learning paths for an increasingly diverse student body;
- the role of higher education inserting itself into a perspective of lifelong learning;
- the conditions needed to optimise access to mobility; and last but not least, to
- meaningful internal and external quality assurance procedures.

Such challenges are only beginning to be realised in their full scope. As institutions dive into the vicissitudes of designing new curricula in accordance with Bologna principles, they are often not yet aware of the systemic changes which Bologna, as a package of different but interlinked objectives, implies. At first, most institutions are focusing on curricular reform. Other Bologna objectives, such as establishing ECTS on an institution-wide basis or promoting mobility, may not be new and are rarely seen as systemically relevant. But it may be expected that the more curricular changes advance and the more systemically relevant aims of Bologna and Prague, such as encouraging lifelong learning and looking for mutual recognition between quality assurance procedures, are acknowledged at institutional level, the more challenging the Bologna reforms will become.

In this study, we departed from the assumption that Bologna reforms, if taken as a whole, are necessarily relevant to the overall system of higher education, not just at national but also at institutional level. We therefore tried to uncover where those challenges are felt most strongly, where problems occur and where conflicts between these reforms and other conditions of institutional development are emerging. Most importantly, we sought to highlight what interpretations are given by institutional actors to the various Bologna goals and objectives and what success factors they attribute to the individual change processes involved in making the EHEA a reality.

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1   Guy Haug, Jette Kirstein: *Trends in Learning Structures in Higher Education*, Brussels 1999. See http://www.bologna-berlin2003.de, "main documents".
2   Guy Haug, Christian Tauch: *Trends in Learning Structures in Higher Education II*, Helsinki 2001. See http://www.bologna-berlin2003.de, "main documents".

In order to capture trends not only at national but also at institutional level, and to do justice to students' views and experiences as well as to at least one stakeholder perspective, questionnaires were sent to five different groups:

- the 33 ministries in charge of higher education (as had already been done in the precursor study "*Trends II study*", with the exception of Turkey);
- the 33 rectors' conferences (also approached in *Trends II*, likewise with the exception of Turkey);
- the ministries and rectors' conferences in the South East European countries that want to join the Bologna Process (the SEE ministries had already been included in *Trends II*);
- 1800 heads of higher education institutions (HEIs), including not just the heads of universities but also other higher education institutions (i.e. all EUA member institutions, all EURASHE member institutions, and all other HEIs with EC Socrates contracts);
- the national and European student associations;
- the national employers' associations (members of UNICE - Union of Industrial and Employers' Confederations of Europe).

The deadlines were set between the months of December 2002 and February 2003, so that the processed data became available in several phases between mid-February and mid-March 2003.

In order to encourage optimal feedback, open questions were avoided in the design of the questionnaires, especially for the heads of institutions. The response rate was thus also sufficiently representative: 45% of the HEIs returned the questionnaires, all but one of the ministries, 90% of the rectors' conferences, 80% of the student associations and 50% of the employers' associations.

In addition to the data gathered through the questionnaires, we included all the recent studies on the Bologna and Prague objectives and related issues which had been published since the EUA Salamanca Convention in 2001 (see Bibliography). We also looked at the most important EU communications and working documents relevant to the Bologna Process. Furthermore, the national reports submitted to the Bologna Follow-up Group were taken into account in so far as these were already available (which was the case for about a third of the Bologna signatory countries). Finally, the authors attended as many Bologna-relevant events as they could, and included all of the conclusions and recommendations of the official Bologna seminars in their analysis and synthesis of recent trends.

We should point to the limits imposed by the availability of data and thus implicitly also to recommendations for the future monitoring of the Bologna Process.

Firstly, it should be stressed that all of the questions asked to the various stakeholders groups were requests for subjective judgements regarding facts and opinions on current structures and developments. No hard data was requested, not only because it would have been impossible to process with the time and resources available, but it would also have resulted in low and therefore unrepresentative response rates to the questionnaires. The authors are convinced, however, that the various converging and conflicting judgements reflected in the answers to the questionnaires, as well as the additional studies consulted, result in a reasonably reliable picture of reality in the various national and European contexts. For the future, it would nevertheless be desirable to add qualitative monitoring visits and some quantitative data collection on a small set of questions to the data gathering process. Of course, a sufficient amount of time would have to be foreseen to collect and process such data.

Secondly, it should be pointed out that, although this phase of observing the Bologna Process has already been much more inclusive than the previous ones, by reaching out to the institutions and students in order to obtain reliable estimations of progress and remaining challenges, one group of stakeholders has still been left out of the survey: the academics.

The information gathered on HEI realities has been obtained through the voices of their leaders and their students, but not through those of the academics who are currently involved in making sense of the proposed reforms. Of course, the studies which we consulted and the meetings we attended often included the views of the academics concerned. On the other hand, the fact that the vast majority of academics refrain from organising themselves in national or European professional bodies or associations makes it particularly difficult to obtain representative opinions from this group, and consulting them all would not be feasible given the number of constituents of the group. Their natural form of networking occurs via their fields of research and teaching, rather than on the basis of any transdisciplinary professional self-definition. But the results of the project "Tuning Educational Structures in Europe", the only European project which is currently being designed and conducted by academics and for academics to give concrete meaning to the Bologna reforms in various academic disciplines, shows that gathering input from this group is not only the most challenging but also potentially the most rewarding exercise in the reform process.[3] For the next phase of observing the Bologna Process, one should plan some way of ensuring the direct surveying and consultation of the academic staff, in spite of its size and lack of European-wide representation. The engagement of these academics will now become the decisive success factor in the creation of a European Higher Education Area.

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3   For the outcomes of the first phase of the "Tuning" project, see: Julia Gonzalez and Robert Wagenaar, eds. (2003) *Tuning Educational Structures in Europe. Final Report. Phase One*. Bilbao/Groningen. The book can also be downloaded from the following websites: http://www.relint.deusto.es/TuningProject/index.htm or http://www.let.rug.nl/TuningProject/index.htm.

3. THE BOLOGNA PROCESS AND ITS ACTORS

3.1 AWARENESS AND SUPPORT

3.1.1 Analysis

Four years have passed since the Bologna Declaration and it seems that the Bologna Process is now viewed by a majority of higher education representatives in most European countries as a reform agenda which cannot be ignored, but which should be dealt with proactively if universities are not to be overtaken by unwanted interpretations of what Bologna should mean at institutional level. The ongoing challenge faced by all participants in the Process, be they enthusiasts or sceptics, is to make sense of the Bologna objectives in each institutional context.

Awareness of the Bologna Process (BP) seems to have increased significantly over the last two years. While no quantitative data was available then, the many Bologna seminars and information workshops at the time revealed a considerable lack of information as to the contents and scope of the Bologna Process. In 2003, ministries, rectors' conferences as well as the student associations judged this awareness to be highest among the heads of institutions, all of whom were felt to be very much or reasonably aware. The only exception was among the heads of UK institutions, who were generally felt to be not very aware of the Bologna Process by their rectors' conference.

The second ranked, but considerably less informed group, appears to be the academic staff. No more than 15% of the representatives of ministries, rectors' conferences, heads of institutions and student associations, judged academic staff to be very aware of the BP, with the more removed observers being more optimistic in this respect. Only about 12 % of the heads of institutions thought their academic staff was very aware of the BP, while more than half felt they were reasonably aware of the BP. However, more than a quarter of the heads of institutions and nearly half of the student association representatives – i.e. both groups who are in close contact with academics – judged academics to be not very aware of the BP.

Both the administrative staff of HEIs and the students are seen to be not very aware of the BP by more than half of the HEI heads. More than half of the student associations judge their own constituencies to be quite unaware of the BP. The fact that the more removed ministries have a more positive judgement in this respect might reflect that the dialogue between ministry, HE representatives and students is often more developed at national than at institutional level.

One should note that there are considerable differences between individual countries as far as BP awareness is concerned, reflecting, one may assume, the intensity of ongoing discussions and deliberations regarding the implementation of Bologna with the relevant groups. According to the rectors' conferences and the heads of institutions, academic staff awareness of the BP seems to be particularly low in Estonia, Lithuania, Sweden, Germany, Ireland and the United Kingdom (the UK has by far the lowest reported BP awareness level for academics). This does not mean, of course, that no reforms are being undertaken, but that if there are reforms they may not be explicitly associated with the Bologna Process. In the case of Sweden, for instance, reforms along the lines of the Bologna Process are often not carried out in the name of Bologna. Furthermore, there are sometimes sub-sectors of a higher education system where the Bologna Process is more widely debated than in the general national HE debate. Thus, in Ireland, in contrast to the average national figures, the engineering departments have been reported to be quite aware and very actively involved in debates on Bologna.

It should be noted that the awareness among academic staff in universities is judged to be considerably higher than that of the academic staff in other higher education institutions.

The same basic trends may also be identified in South East European (SEE) countries, though it should be noticed that a higher proportion of academics and students seems to be very much or reasonably aware of the BP.

These awareness levels can be said to reflect to some extent **the state of implementation of the Bologna reforms at institutional level**. Thus the fact that awareness is greatest among heads of institutions, less but still reasonably developed among academics and relatively low among administrative staff and students, clearly reflects the relative top-down quality of Bologna reforms, as well as the fact that discussions among heads of institutions and academics have progressed considerably, presumably concerning the guidelines and contents of curricular reform at institutional level. However, at most institutions the implementation of the various Bologna operational objectives does not seem to have progressed far enough to have reached administrative planning and adjustment, e.g. concerning exam administration, credit point registration, new access guidelines for Master level applicants, changes in room administration due to different course sizes (a possible effect of modularization or of a different distribution of courses between Bachelor and Master level), new or increased budget lines, or whatever else one may imagine as administrative tasks faced in the context of Bologna.

Furthermore, student involvement at departmental level, i.e. in the actual shaping of curricular reform, seems to be less developed than the dialogue between higher education representatives and students at national or institutional level.

Support for the Bologna Process is remarkably widespread not only among representatives of ministries but also among rectors' conferences and heads of institutions. More than two thirds of the heads of institutions regard it as essential to make rapid progress towards the EHEA, and another 20% support the idea of the EHEA but think the time is not yet ripe for it. Only in Norway, France, the French-speaking community of Belgium, Germany, Hungary, Portugal, Ireland and the UK, more reserves regarding rapid progress toward the creation of the EHEA are noted by heads of institutions and/or rectors' conferences. Despite their not having formally joined the BP, SEE higher education institutions take the Bologna Declaration as their reference framework and 90% consider that it is essential to make rapid progress in the creation of the EHEA. Considering a number of newspaper articles on opposition to overly rapid Bologna reforms among academics, it is unfortunate that their opinion could not be gathered in the framework of this study, especially since the current phase of the Bologna reforms depends essentially on their curricular ideas and definitions of meaningful innovation. From the student associations it can also be gathered that, while there is ample support for many aspects of the Bologna reforms, others are met with considerable resistance (see section 3.3). Generally, it may be said that the pace of the BP reforms, the necessity of sufficient intra-institutional dialogue and coordinated processes of implementation are becoming more and more in need of support by academics and students alike, i.e. by the HE groups most directly concerned as actors and beneficiaries of the reforms.

Considering the widespread support for the Bologna Process among heads of higher education institutions and their relatively high level of awareness of the Bologna Process, it is somewhat surprising how few of them find it necessary to coordinate such widespread reforms at institutional level. **Only a little more than a third of the higher education institutions have a Bologna coordinator as such**. Differentiated by universities and other HE institutions, one notes that 47% of universities have a Bologna coordinator whereas only 29,5% of other HEIs have created such a position. Of course, this does not mean that those who do not have a coordinator do not have other existing or especially created institutional bodies which coordinate the Bologna reforms, or at least some aspects of these. However, in light of the scope of the Bologna reforms, which involve not only all disciplines but different groups of actors across the whole institution, it remains an open question how such reforms can be planned, handled and communicated effectively without an institutional coordinator acting as overall project manager.

3.1.2 Key findings

- Awareness of the Bologna Process has increased considerably during the last two years. It is generally more developed at universities than at other higher education institutions.

- Awareness is most developed among heads of institutions while being less but still reasonably well developed among academic staff.
- As yet, administrative staff and students seem to be less included in deliberations of the implementations of Bologna reforms, judging from the awareness levels attributed to those groups.
- In Estonia, Lithuania, Sweden, Germany, Ireland and most strongly the UK, deliberations regarding institutional Bologna reforms seem to be considerably less widespread.
- There is widespread support for the Bologna Process among heads of HEIs, with some resistance to individual aspects and the pace of the reforms. Such resistance is more pronounced in Norway, France, the French-speaking community of Belgium, Germany, Hungary, Portugal, Ireland and the UK.
- Though some SEE countries have not yet formally joined the Bologna Process, they already take it as a reference framework and actively promote its objectives.
- Little more than a third of the HE institutions have a Bologna coordinator.

3.1.3 Future challenges

- The reforms still have to reach the majority of the HE representatives who are supposed to implement them and turn them into reality.
- Interpreting Bologna in the light of its goals and the whole context of its objectives at departmental level, i.e. rethinking current teaching structures, units, methods, evaluation and the permeability between disciplines and institutions, is a task that still lies ahead for a majority of academics at European universities.

3.2 THE ROLE OF HEI IN THE CREATION OF THE EHEA

"European higher education institutions, for their part, have accepted the challenge and taken up a main role in constructing the European area of higher education in the wake of the fundamental principles laid down in the Bologna Magna Charta Universitatum of 1988." (Bologna, 1999)

"Ministers stressed that the involvement of universities and other higher education institutions and of students as competent, active and constructive partners in the establishment and shaping of a European Higher Education Area is needed and welcomed. The institutions have demonstrated the importance they attach to the creation of a compatible and efficient, yet diversified and adaptable European Higher Education Area. […] Ministers expressed their appreciation of the contributions toward developing study programmes combining academic quality with relevance to lasting employability and called for a continued proactive role of higher education institutions." (Prague, 2001)

3.2.1 Analysis

In the Prague Communiqué, the ministers highlighted the role of higher education institutions in the creation of a European Higher Education Area. This may seem tautological: as one European rector put it, not having HEIs play the decisive role in the creation of the EHEA is like playing Hamlet without the prince. It becomes a more meaningful emphasis, however, if seen in the light of the fact that the Bologna Process started out as an intergovernmental process. Of course, it must have been self-evident already to the ministers who signed the Bologna Declaration that the higher education institutions would ultimately be responsible for the realisation of the Bologna objectives. Nevertheless, ongoing discussions regarding Bologna implementation reveal that quite a number of ministry representatives still feel that the heart of Bologna lies in the requirement to adapt and adopt "Bologna-compatible" legislation. Anyone in touch with higher education realities will agree, however, that Bologna-compatible legislation is a necessary but insufficient condition for the successful realisation of the European Higher Education Area and the Bologna objectives.

Half of the heads of HEIs from Bologna signatory countries believe they are playing a very or reasonably active role in the construction of the EHEA. This holds true also for the heads of HEIs from SEE. In contrast, 42% of HEIs from Bologna signatory countries feel they are not yet playing an active role in this regard. While "active role" scores are noticeably high for HEIs from The

Netherlands, France, Switzerland (universities), Italy and Finland, it is particularly the heads of HEIs in Estonia, Croatia, Germany, the Slovak Republic, Sweden and the UK, as well as the non-university HEIs of Switzerland and the Czech Republic who find room for improvement as far as their role in the construction of the EHEA is concerned. 62% of all European university rectors and 57% of heads of other HEIs feel that institutions should be involved more directly in the realisation of the Bologna objectives. A high proportion of HEIs in Greece, Bulgaria, Romania and other SEE countries (more than 60%, i.e. more than double the Europe-wide average of 30%) also believe that a monitoring and reporting system should be established in order to increase HEI participation in the construction of the EHEA.

As far as the conditions under which institutions are trying to implement the Bologna reforms are concerned, it should be noted first of all that **50% of HEIs find that the legal framework in their countries supports autonomous institutional decision-making, while 46% find that their legislation at least partly undermines such decision-making**. Particularly in Belgium, Germany, Portugal, Slovenia, SEE countries and the non-university sector of Italy, many HEI leaders find that legislation undermines their autonomous decision-making. The rectors' conferences of Belgium, Denmark, France, Greece, Hungary, Poland, the Slovak Republic, Spain and Sweden also point to problems of autonomous decision-making by institutions. Representatives of HEIs and rectors' conferences of those countries call for legislative reforms to allow for more room for institutional initiative. In contrast, only three of the ministry representatives acknowledge constraints with respect to autonomous institutional decision-making (Greece, Portugal, Turkey).

It should be noted in this context that a comparatively high number of HEIs with a specialisation in business and economics find that the legal framework in their country undermines institutional autonomy. (The concerns associated with institutional autonomy will be discussed in section 6.1.) Apart from institutional autonomy, another success factor for reform should be mentioned, namely funding, which determines to a considerable extent the scope of possible reform initiatives which HEIs are able to undertake. It goes without saying that the Bologna higher education reform Process will only be realised if and when these reforms are implemented by higher education institutions. **What seems less obvious to some actors in the Bologna Process is that the Bologna reforms cannot be realised without additional funding**. While legislation sets the framework within which HEIs can or cannot act, financing provides the fuel which helps to ignite and to support the necessary reforms at institutional level. The improvements implied in the Bologna reforms (see sections 5 and 6) propose a higher education system which performs at a higher qualitative level than before, and which involves even closer cooperation between its institutions than before. Moreover, it is becoming more and more apparent in the course of implementing the new (or adapting the old) curricular structures in line with the Bologna Declaration, that such reforms involve the creation of more flexible or even individualised learning paths (see section 5.1). Such diversified access and learning paths within HE entails more counselling, tutoring, smaller and possibly more diverse groups, intensified dialogue between teachers and students, more time investment in quality assurance and qualitative self-enhancement, better support services for the diversified student body and improved access conditions. These implications of the Bologna reforms contrast sharply with the ideas of some HE administrations that the introduction of a shorter first degree would be a way to reduce the unit costs of HE at Bachelor level (which would become the "normal" degree for a majority of students) and to limit access for the increasing number of students to the second level degree. In this scenario, the unit costs at Bachelor level would be reduced and only the more selective Master studies would allow closer attention to individual students. To sustain the illusion of saving costs in higher education or of not increasing funding, despite the steadily increased or increasing number of students, one must also ignore all the other Bologna dimensions, such as increased attention to quality assurance and lifelong learning, together with the idea of individualised learning paths.

In short, the ministers of education have signed a Declaration in 1999 (and confirmed it in 2001) which implies considerable increases of investment in teaching and learning. These implications

are only beginning to become evident, at a time when many higher education ministries in Europe are struggling to maintain current funding levels, let alone to meet the aims and funding targets set for the research dimension of higher education by their heads of governments in Lisbon in 2000 and in Barcelona in 2002.

Indeed, while many governments have made considerable progress with respect to the creation of legal frameworks which allow HEIs to implement Bologna reforms, only half of them seem to have provided some funding to the HEIs for the reforms. The **discontent with financial support for Bologna reforms** is voiced most often (by more than 80% of HEIs) in Belgium, Bulgaria, Germany, Greece, Iceland, Ireland, The Netherlands, Romania, Slovenia, Spain, the UK and the SEE countries. Generally, 75 % of the HEIs and two thirds of the rectors' conferences find that clear financial incentives should be provided in order to support the involvement of HEIs in the Bologna reform. As might be expected, there is a discrepancy of opinion between HEIs and ministries on this point: while two thirds of the ministry representatives feel that the national financing mechanisms support the Bologna Process and only one quarter mentions that no support is given for Bologna, only half of the HEIs find that current funding supports the BP.

There is no data on the number of countries which have attempted to estimate the additional first time investment and additional running costs of Bologna-compatible HE structures. One known example to mention is Switzerland, where the universities have estimated that the Bologna costs (mostly related to curricular reforms and the introduction of ECTS) amount to initial investment costs of Euro 34 million (as a conservative estimate) and additional yearly recurring costs in the medium term of Euro 135 million (excluding "non-specific measures" such as the extension of doctoral studies, increased mobility, additional language courses, additional grants and additional marketing etc.). This would amount to Euro 3.4 initial investment costs per university and additional yearly running costs of Euro 13.5 per university.[4] Whether such support will actually be made available by the government without simultaneous substraction of public HE funding in other domains remains as yet unresolved in Switzerland, as it does in other Bologna countries. Clearly, some mutual understanding of the financial implications of Bologna (and other) reforms still has to be found between funders and funded institutions.

But leaving financial conditions and legislative frameworks aside for a moment, we should ask what precisely is the role of universities and other HEIs in realising the Bologna objectives, be these more general (quality enhancement, increased competitiveness and cooperation, employability of graduates) or more operational (introducing a two-tier structure, credit transfer system, recognition procedures)? Some empirical evidence on the nature and quality of the processes of implementing Bologna reforms was gathered in the framework of the EUA Quality Culture Project. In one of the project thematic networks, ten institutions from all over Europe compared their Bologna reform processes in an attempt to establish a blue-print action plan, and to collect models of good practice which might help other institutions as a possible guideline for their own Bologna reforms. Their report will be published in summer 2003, but one basic element has already become evident: while the individual institutional challenges, strengths and weaknesses differed widely, this institutional benchmarking exercise revealed clearly that the greatest challenge consisted in implementing an overall institutional change which had to combine strong institutional coordination with deep academic ownership. The strong central coordination was deemed necessary in view of the scope and multi-dimensional nature of the reforms, affecting content, methods, structures and units of teaching, but also many administrative issues, such as new assessment arrangements in the wake of introducing ECTS, more counselling and support services, extended information and marketing, to mention just some of the tasks involved when taking Bologna seriously. But strong central inititatives would not lead to the desired results without the large-scale involvement of academics, since the heart of Bologna lies in the enhancement of quality and curricular reform, the core competence of the academics. Thus, universities in Europe, which are often strongly decentralised in their decision-making structures, are facing in the Bologna reforms a particularly far-reaching institutional reform process, requiring an unusual effort of communication and orchestration on

4   Planning Report of the CRUS (Conférence des Recteurs des Universités Suisses) 2002.

the part of institutional management. The right mix of guidance and outcome orientation on the one hand, and free reflection on the sense of the reforms in different disciplinary and transdisciplinary contexts, on the other, is needed in order to lead to sustainable change for the better.

3.2.2 Key findings

- 46% of HEI rectors/presidents find that their national legislation undermines autonomous decision-making, at least in part. Particularly in Belgium, Denmark, France, Germany, Greece, Hungary, Poland, Portugal, the Slovak Republic, Slovenia, Spain, Sweden and SEE, HEIs and rectors' conferences point to the limits of autonomous decision-making by institutions.
- 62 % of university rectors and 57% of heads of other HEIs in Europe feel that institutions should be involved more directly in the realisation of the Bologna objectives.
- While many governments have made considerable progress with respect to the creation of legal frameworks which allow HEIs to implement Bologna reforms, only half of them seem to have provided some funding to the HEIs for these reforms. The lack of financial support for the Bologna reforms is highlighted by nearly half of all HEIs in the Bologna signatory countries. This means that Bologna reforms are often implemented at the cost of other core functions or essential improvements.
- 75% of all heads of HEIs think clear financial incentives for involvement in the Bologna reforms should be provided.

3.2.3 Future challenges

- The dialogue between rectors and academics, institutions and ministry representatives needs to be intensified, beyond the reform of legislation, concerning both the implications of Bologna reforms at institutional level and the support from the State needed to foster these reforms.
- Institutions will have to calculate all the costs connected with the Bologna reforms, not just individual ingredients, including the increased recurrent running costs, and show the ramifications of Bologna reforms for all regular institutional processes, in order to convince governments that the Bologna goals cannot be pursued seriously without additional funding.
- Governments should show their genuine support for the Bologna reforms by providing sufficient funding for their implementation, without reducing the already tight budgets for other core areas of universities, such as research and infrastructure, which in most countries have been severely underfunded for decades.
- Important changes in HEI governance and management structures are needed in order to cope with the needs for increased coordination, communication and orchestration of institutional academic and service units.

3.3 THE ROLE OF STUDENTS IN THE CREATION OF THE EHEA

"Ministers stressed that the involvement of universities and other higher education institutions and of students as competent, active and constructive partners in the establishment and shaping of a European Higher Education Area is needed and welcomed. […] Ministers affirmed that students should participate in and influence the organisation and content of education at universities and other higher education institutions. Ministers also reaffirmed the need, recalled by students, to take account of the social dimension in the Bologna process." (Prague, 2001)

3.3.1 Analysis

At 63% of universities in Bologna signatory countries, students have been formally involved in the Bologna Process, i.e. through participation in the senate or council or at faculty/departmental level. In the HEIs of the non-signatory countries in SEE an even higher proportion of students are formally involved in the process. A significantly lower degree of formal participation at institutional level can be noted at other higher education institutions, but also at universities in Greece, Portugal, Slovenia, Iceland and a considerably lower degree again in the UK. In these countries,

information on the issues involved in the Bologna Process was also provided less often to students. (In the UK, however, such lack of participation was not seen as problematic, since the BP was not regarded as a priority by the students themselves.) In general, information on the BP was provided to students by more than half of the universities and slightly less than half of the other HEIs.

Reflecting such involvement, half of the students, as represented by their national and European student associations, feel they are playing a very or reasonably active role in the construction of the EHEA. Particular discontent is noted by the students from Germany ("student involvement seems to be practically not or hardly wanted").

In spite of their many criticisms of individual aspects of the BP, which mostly have to do with the implementation rather than its principles, student associations still strongly support the BP. One may even say that they express the highest hopes concerning its principles and the harshest criticisms concerning its implementation and frequently reductive interpretations. A comment by one student association reflects this tension: "*Except for a few experts, hardly anyone sees and implements the whole number of instruments or measures of the Bologna Process. Only technical or virtual changes take place, there seems to be no interest in a qualitative reform of study programmes.*" We should add that, quite often, student representatives express hopes that European cooperation and peer pressure among governments concerning the Bologna Process will push the long-awaited reforms in their national systems.

The student contributions to individual Bologna action lines is discussed in the relevant sections of this report. At this point, we should highlight that the **students' contribution has been particularly strong and outspoken on issues of the social dimension of higher education and the emphasis of HE as a public good, in connection with discussions of the possible consequences of GATS** on higher education institutions. In fact, not only in Prague in 2001 but also in many national debates, student representatives were often the ones to stress the values of HE which lie beyond its contribution to economic welfare and labour market concerns. Students have also continuously stressed the values of student-centered learning, flexible learning paths and access, as well as a realistic, i.e. empirically based, estimation of workload in the context of establishing institution-wide credit systems. Their contribution to the analysis of conditions and obstacles to mobility, as well as to an increased focus on learners' needs in the context of quality assurance procedures, has become a vital ingredient of these reform processes.

3.3.2 Key findings

- At 63% of universities in Bologna signatory countries, students have been formally involved in the Bologna Process, i.e. through participation in the senate or council or at faculty/departmental level. The same trend is valid for the non-signatory countries in SEE.
- A significantly lower degree of formal student participation in the Bologna Process at institutional level can be noted in Greece, Portugal, Slovenia, Iceland and the UK. In these countries, information on the issues involved in the Bologna Process was also provided less often to students. In the UK, however, the Bologna Process was not seen by students as a priority and their lack of participation therefore not as problematic.
- Half of the students, as represented by their national and European student associations, feel they are playing a very or reasonably active role in the construction of the European Higher Education Area.
- Student representatives express the highest hopes concerning the principles of the Bologna reforms and the harshest criticisms concerning their implementation and frequently reductive interpretations.
- The students' contribution has been particularly outspoken on issues of the social dimension of higher education and the emphasis of HE as a public good, in connection with discussions of the possible consequences of GATS on higher education institutions.
- Students have also continuously stressed the values of student-centered learning, flexible

learning paths and access, as well as a realistic, i.e. empirically based, estimation of workload in the context of establishing institution-wide credit systems.

3.3.3 Future challenges

- At institutional and particularly at departmental level, the inclusion of students in deliberations concerning a qualitative reform of teaching and learning structures, methods and assessment in the spirit of the Bologna Declaration, still leaves considerable room for improvement.
- The dialogue between students and other HE groups should focus more strongly on the individual Bologna objectives and issues of meaningful implementation, rather than just on the overarching goals. In some countries, debates on the perceived relation of the Bologna reforms to a purely economic agenda have often reinforced existing divides between students and other groups in HE, rather than opening doors to allow for their justified concerns regarding the quality of higher education.

4. THE BOLOGNA PROCESS AND ITS GOALS

4.1 ENHANCING THE EMPLOYABILITY OF EUROPEAN HE GRADUATES WITHOUT COMPROMISING ON ACADEMIC QUALITY

"The Sorbonne declaration stressed the Universities' central role in developing European cultural dimensions. It emphasised the creation of the European Area of Higher Education as a key way to promote citizens' mobility and employability and the continent's overall development." […] Objectives: adoption of a system of easily readable and comparable degrees in order to promote European citizens' employability …" (Bologna, 1999)

"Ministers expressed their appreciation of the contributions [of higher education institutions] toward developing study programmes combining academic quality with relevance to lasting employability and called for a continued proactive role of higher education institutions." (Prague 2001)

4.1.1 Analysis

Preparing graduates for the European labour market is regarded as one of the three most prominent driving forces of the Bologna Process. Together with the enhancement of academic quality, this constitutes the most frequently mentioned force behind the Bologna Process, according to the representatives of ministries, rectors' conferences and higher education institutions. Student associations also regard this as the most important driving force, together with the competitiveness of the national HE systems in the wider world.

But in addition to these judgements, which may be said to reflect ongoing national debates, a remarkable consensus has been reached at institutional level on the value of the employability of HE graduates in Europe: 91% of the heads of European HEIs regard the employability of their graduates to be an important or even very important (56%) concern when designing or restructuring their curricula. However, monitoring of progress appears to be less strongly developed, with 30% of HE institutions actually tracking the employment of all of their graduates, 40% tracking the employment of some and 25% not tracking any. These findings have been confirmed in the framework of the Transnational European Evaluation Project which discovered a low extent of systematic feedback from stakeholders, the labour market or graduates at programme level. Perhaps one may conclude from this discrepancy between the importance attributed to the value of employability and the limited extent of concrete measures for its implementation, that the relative importance of this issue has been established only recently in some countries, such as Austria, Germany, Switzerland, Norway and Slovakia. In these countries, over 40% of HEIs have no system for tracking graduates yet, while in SEE about 70% of HEIs do not have such a system in place (and 15% consider that graduate employability should not be their concern).

A problem arises, however, with the various interpretations of the term "employability", which is associated with the introduction of a two-tier system and in particular with the introduction of a first Bachelor degree after three years of study. It was stressed in the Bologna Declaration, of course, that even this first degree should imply the employability of the graduate. All over Europe, the most heated debates among university representatives have revolved around fears of an overly narrow interpretation of the term "employability" which could threaten to undermine academic quality. The fear consisted in "producing students prepared for a limited niche of markets with an overly short-term perspective, rather than focussing on the whole range of academic skills which would enable graduates to adapt continuously to changing social and economic needs."[5] The EUA Salamanca Convention in 2001 had already focused on this issue and stressed the value of transferable skills and competences in promoting long-term employability.

Fears of short-sighted misunderstanding of the ways in which higher education should aim at "relevance" to society and the economy have re-emerged frequently, mostly in the university sector, and in the context of comparing and redesigning modules or degree structures. According to some university representatives, aligning Bachelor degrees too narrowly with short-term, nationally

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5   Jürgen Kohler, *Workshop Report on the Construction of a Campus Europae*, produced for the HRK Conference on Quality Assurance, Bonn 2002.

defined employability often results in curricula which are overloaded with content defined to a large extent (though indirectly) by national employers. Complaints of such developments have been voiced particularly strongly in higher education systems in which the national legislation has highlighted the "employability" issue, and in which legislators have stressed the current national labour market demands, as is the case in Italy, for example.

A noteworthy discussion of the goal of enhancing employability in an academic context could be observed in the framework of the EUA Quality Culture Project. One thematic network, which comprised eight very different universities from all over Europe, focussed on the implementation of the Bologna reforms, thus offering the most in-depth European comparison currently available of Bologna implementation processes at institutional level. Their discussion of "employability" in a university context may be taken as a *pars pro toto* in this context. Employability of university graduates was understood by these universities to mean "acquiring competences of innovation and leadership which are important both in the academic field and in other employment sectors".[6] According to the institutions in this network, the link between employability and academic quality should be achieved by fostering analytic thinking, competent reasoning, the ability to structure information and arguments, and the ability to interact in a social context. Participants in the network shared the fear that if employability were too narrowly associated with fitness for a specific professional field, this would result in a downgrading of universities to "mere teaching institutions". When debating the optimal procedures to foster employability in a university context, however, the network did not reach a consensus. Two different views were expressed. A "consecutive" view sees a division between competences more closely associated with academic quality and those associated with employability. In this view, the "employability competences" are more often attributed to the Bachelor level programmes, whereas "academic competences" are supposed to be concentrated at the Master level (unless a Master programme is specifically designed to serve specific professional markets). The other, "integrated", view argued that academic quality and employability are specifications of the same competences, useful both to academia and to other sectors of the labour market. Hence, such competences are supposed to be fostered at both Bachelor and Master levels, but with different degrees of specialisation.[7]

Generally speaking, we may say that the agreement reached in Salamanca in 2001, that universities should aim at sustainable employability rather than respond to short-term labour market concerns, has been confirmed strongly in many national and institutional debates on the best ways to reform learning structures, contents and methods. The growing trend toward structuring curricula in view of the learning outcomes and competences is often seen as a way to ensure that academic quality and long-term employability become compatible goals of higher education.

4.1.2 Key findings

- Enhancing academic quality and the employability of graduates are the two most frequently mentioned driving forces behind the Bologna Process, according to the representatives of ministries, rectors' conferences and higher education institutions.
- A remarkable consensus has been reached at institutional level on the value of the employability of HE graduates in Europe: 91% of the heads of European HEIs regard the employability of their graduates to be an important or even very important concern when designing or restructuring their curricula.
- Fears of short-sighted misunderstanding of the ways in which higher education should aim at employability and relevance to society and economy have re-emerged frequently in the context of comparing and redesigning modules or degree structures.
- The growing trend toward structuring curricula in view of the learning outcomes and competences is often seen as a way to ensure that academic quality and long-term employability become compatible goals of higher education.

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6   EUA Quality Culture Project, *Network Report of Thematic Network 4, "Implementing Bologna Reforms"*, March 2003.
7   EUA Quality Culture Project, *Network Report of Thematic Network 4, "Implementing Bologna Reforms"*, March 2003.

4.1.3 Future challenges

- To meet the justified concerns of stakeholders about the relevance of higher education and the employability of HE graduates, without compromising the more long-term perspective proper to higher education institutions and universities in particular, may well be the most decisive challenge and success-factor of Bologna-related curricular reforms.
- The issues of enhancing academic quality and fostering sustainable employability will have to form and remain a pair, if the Bologna reforms are to be realised by higher education institutions.
- How academic quality relates to employability at any given higher education institution will be a prime matter of institutional positioning in Europe and the world.

4.2 PROMOTION OF MOBILITY IN HE

"[…] creation of a European area of higher education as a key way to promote citizens' mobility. […] Promotion of mobility by overcoming obstacles to the effective exercise of free movement, with particular attention to students, access to study and training opportunities and to related services, to teachers, researchers and administrative staff, recognition and valorisation of periods spent in a European context researching, teaching and training, without prejudicing their statutory rights." (Bologna, 1999)

"Ministers reaffirmed that the objective of improving the mobility of students, teachers, researchers and administrative staff […]is of the utmost importance. Therefore they confirmed their commitment to pursue the removal of all obstacles to the free movement of students, teachers, researchers and administrative staff and emphasised the social dimension of mobility." (Prague, 2001)

4.2.1 Analysis

Of all the overarching aims of the Bologna Process, the promotion of mobility is clearly the most concrete, easily interpreted and uncontroversial. Of course, apart from being an aim in itself (expanded mobility as a vital ingredient of a European Higher Education Area), the promotion of mobility can also be seen as an instrument for achieving the other aims of the Bologna Process. The underlying assumption is, of course, that only extended exposure to other parts of Europe will build a sense of a common cultural and civic European identity. Indeed, one may note that, when asked in the context of this study how large the proportion of mobile students and staff should be in order to make the EHEA a worthwhile reality, half of the student representatives found 25% to be the minimum participation rate for student mobility and 20% for staff mobility.

The correlation between employability and student mobility is also undisputed. Even though a methodology for measuring the professional impact of periods of mobility has not yet been devised, employers continuously point to the benefits of periods of study abroad in enhancing the social, communicative and intercultural competences of graduates.

Given such far-reaching agreement on this aim, one may ask what the actions for its realisation should be. The Bologna Declaration and Prague Communiqué highlight the **removal of any obstacles to mobility as central actions** in this context.[8] The widely accepted measures proposed in the Commission's Action Plan aim to "democratise access" to mobility, i.e. by allowing groups that are under-represented in student mobility to participate more easily.

The **most decisive obstacle to mobility lies in insufficient means to pay for the additional mobility costs incurred,** even if mobility grants are provided. Indeed, financial cost is mentioned as the main obstacle to mobility by 80% of the students asked in the context of this study. The second most important obstacles pointed to (by 42% of the students) consist in academic recognition issues (discussed in section 5.3 below) and language barriers.

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8 In December 2000, the European Council and the representatives of the governments of the EU Member States agreed to facilitate the implementation of Community initiatives in this area and welcomed the Commission's *Action Plan on Mobility,* which identified mobility obstacles and 42 measures aimed at removing them, including increased and more diversified financing of mobility, and retention of benefits during mobility period (including grants), better information on mobility programmes and mobility statistics, better language training, more flexible forms of mobility as well as the quality of reception services, counselling and administration of mobility, to name just a few. Cf. *Official Journal of the European Communities* (2000/C 371/ 03).

Another important obstacle, which is less often acknowledged sufficiently, may be the locally-based commitments such as part-time work positions, family obligations, rent and other financial obligations which have to be paid even while being a short-term resident elsewhere etc. A recent study on the social and economic conditions of student life in Europe (in eight EU countries) confirms the extent of such obligations which may act as obstacles to mobility.[9] This study shows that a majority of students are employed in part-time positions (ranging from 50% in Belgium to 77% in The Netherlands), and that they derive between 24% (French-speaking Belgium) and 54% (Austria) of their total income from such employment, using more than 25% of their time for this work (11 hours per week for most countries) in comparison to the 75% (31+ hours) spent studying.[10] Such part-time working students obviously require different mobility services and support than traditional mobility students, e.g. by differentiated grant schemes or by providing job opportunities abroad.

While the aims and benefits of mobility as well the obstacles and ways of removing these have been identified and even agreed upon at European level, **it is difficult to establish to what extent any progress has actually been achieved concerning the implementation of these during the last two years**. A majority of ministries and rectors' conferences report that actions have been taken to remove obstacles to student and/or staff mobility (with no notable regional particularities to these answers). However, no exact data has been obtained on a European scale on the scope of these measures. Some examples may be mentioned, such as the introduction of portable grants for students who receive public support (in Scandinavian countries and, more recently with some conditions attached, also in Germany), the relaxation of residency regulations for researchers and research students wishing to remain in the host country, as practiced in the UK. Regarding staff mobility, one should mention the introduction of an academic, more advantageous visa status for visiting researchers and of automatic work permits for spouses, as well as personalised assistance to researchers from abroad provided by the Kastler Foundation in France. Several EU Member States have reduced income tax regimes for a limited period of time for foreign researchers (Denmark, Finland, The Netherlands and Sweden). However, generally speaking, the taxation of student grants and fellowships still varies between countries. The above examples had already been gathered as good practice by the "High Level Expert Group on Improving Mobility of Researchers" in the context of the European Commission's support for the creation of a European Research Area.[11]

Of course, the most important obstacle, according to most HE representatives, is inadequate funding for student grants and fellowships, or for positions for foreign research students in the context of research projects. From the official answers of the ministries and rectors' conferences to the *Trends 2003 questionnaires*, it appears that in half of the Bologna signatory countries, public funds for mobility have been increased (Austria, Belgium (FR), Denmark, Finland, France, Germany, Ireland, Italy, The Netherlands, Norway, Portugal, Spain, Sweden, UK) – a clearly western European reality, one should note. Again the extent of such additional public funds (and whether they entailed reduction of HE funds on other fronts) could not be established in the context of this study. For the accession countries, public funds do not seem to have increased. Erasmus student grant levels have even decreased, according to the Erasmus national agency reports.

Many HEIs report that they have significantly improved conditions of student mobility in the last two years. In particular, welcome and orientation services have been improved by more than three quarters of all HEIs. More than half of the institutions say they have improved language training (60%), counselling services (60%), social and cultural activities for incoming students (58%), accommodation facilities (57%), academic tutoring (57%) and information on study opportunities in other institutions (56%). Increased help with the provision of job opportunities, which might allow some of the least affluent students to finance their stays abroad, has been provided by a very small proportion of HEIs: 13% on average and slightly more often in Switzerland, the UK, Italy and Spain (22-30%). Country divergences are significant (see below, Figure 1). HEIs in Spain, Slovakia,

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9 *Eurostudent. Social and Economic Conditions of Student Life in Europe 2000*, HIS, Hannover, 2002.
10 *Eurostudent. Social and Economic Conditions of Student Life in Europe 2000*, pp. 96-99. Interestingly, the extent to which students are engaged in part-time work is not as dependent on parental income as one might think.
11 High Level Expert Group on Improving Mobility of Researchers, *Final Report*, European Commission DG Research, 2001.

Bulgaria, Romania, Greece and Estonia are those which most often claim recent efforts to increase mobility support services. HEIs in The Netherlands, Belgium, Iceland and most of the countries of the former Yugoslavia have apparently shown very little engagement in such improvements in recent years, according to their own self-estimation.

Figure 1 - Improving conditions for student mobility in Europe: general index[12]
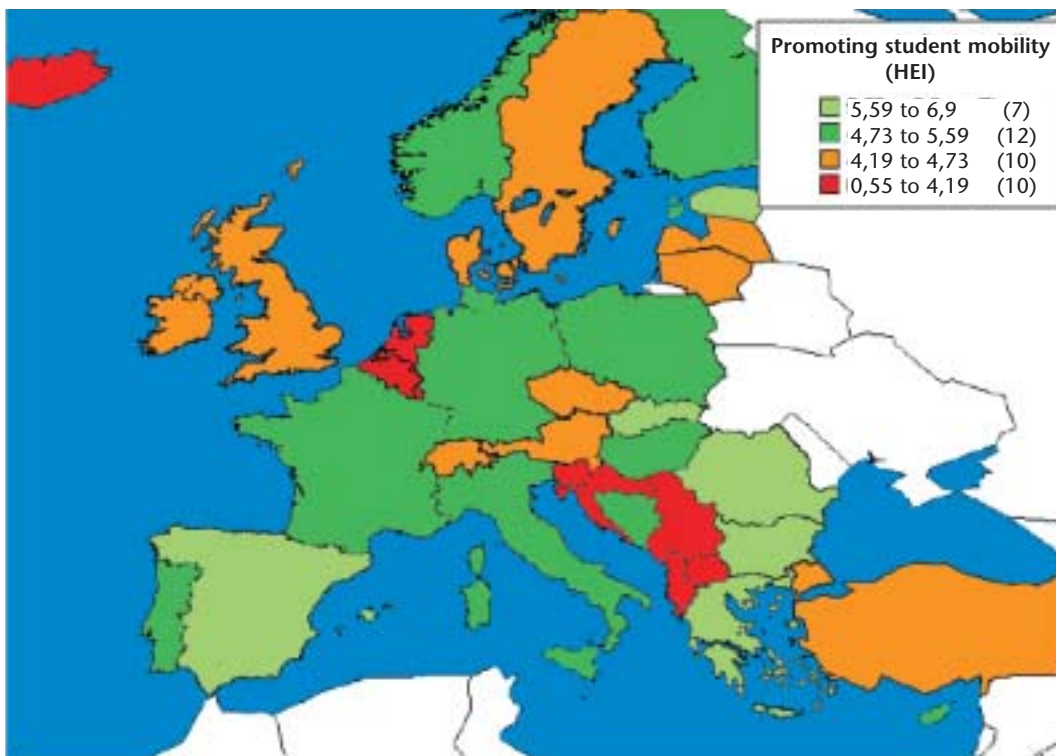
Source: Trends 2003

While exact mobility data is not available, **HEIs, ministries and rectors' conferences all agree that mobility has clearly increased over the last three years**. Outgoing student mobility has grown significantly at 33% of the HEIs and slightly at another 40%, particularly from universities (not other HEIs) in Germany, Greece, Italy, Portugal, Spain, Bulgaria, the Czech Republic, Poland, Romania, Slovakia, Lithuania, Latvia, Cyprus and Malta. Only in The Netherlands 80% of the universities and in the UK a majority of all HE institutions reported that outgoing student mobility had not increased or had even decreased.

For incoming mobility, reports are similar (33% significant increases, 41% slight increases), but, as may be expected, with a different country distribution. **Considerably more western European institutions report significant growth in incoming student mobility**. Here, Germany, Denmark, Finland, Ireland, Italy and Spain take the lead (more than 50% of HEIs). In the accession countries, only a minority (about a quarter) of HEIs report no increase in incoming student mobility, while Bulgaria and Slovenia report considerably higher percentages of institutions with no such increase.

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12 This index reflects the average sum of all promotion activities at HEIs in a given country, on a scale of 1 to 9, given in response to the following question:
    "To improve the conditions of student mobility, has your institution significantly improved any of these services in the last two years?"
    (several answers allowed)
    • welcome and orientation services
    • accommodation facilities
    • job opportunities
    • counselling services
    • academic tutoring
    • information on study opportunities in other institutions
    • language training
    • social and cultural activities
    • other (please specify).

A third of the ministries and rectors' conferences reported that incoming mobility from non-European countries to their country had risen significantly (Austria, the Czech Republic, Finland, France, Germany, Iceland, Malta, The Netherlands, Poland, Spain, Turkey), and another third noted a slight increase. Only two Bologna signatory countries (Denmark and Slovakia) saw no increase of incomers from outside Europe, and four countries reported a decrease (Belgium (Fr), Bulgaria, Romania, Slovenia).

Generally, a considerable imbalance between outgoing and incoming mobility is noted (see Figure 3): only a little more than a quarter of HEIs have achieved a balance of incoming and outgoing students. Those institutions with more incoming than outgoing students (only 21%) are most often located in France (46% of the universities), Netherlands (40% of the universities), Denmark (40% of the universities), Sweden (52% of all HEIs) and, most strongly, in Ireland and the UK where more than 80% of the institutions report such imbalances. Thus only the UK and Ireland are overall net importers of student mobility. However, these figures are based on institutional data and thus do not take into account students who are enrolled in another country for a full study programme (free movers) as this mobility does not take place via the institutions. In some countries, the overall balance may thus be different if the "free movers" are also taken into account. This is the case of The Netherlands, e.g. where the group of free movers is substantial enough to make the country an overall exporter of students in spite of its relatively large import of student mobility via exchange schemes. Generally speaking, a vast majority of institutions report an imbalance of outgoing over incoming students and such a trend is particularly strong in SEE. Thus, a concentration of net student mobility importation and a general mobility preference for western European institutions can be noted. However, the most recent Erasmus mobility figures suggest that incoming mobility to the EU accession countries has increased considerably (39% increase from 2000/2001 to 2001/2002). The existing imbalance of student flows is also reflected in the OECD data on flows between world regions (see Figure 4).

Figure 2 - Overall import and export balance of student mobility in Europe per country
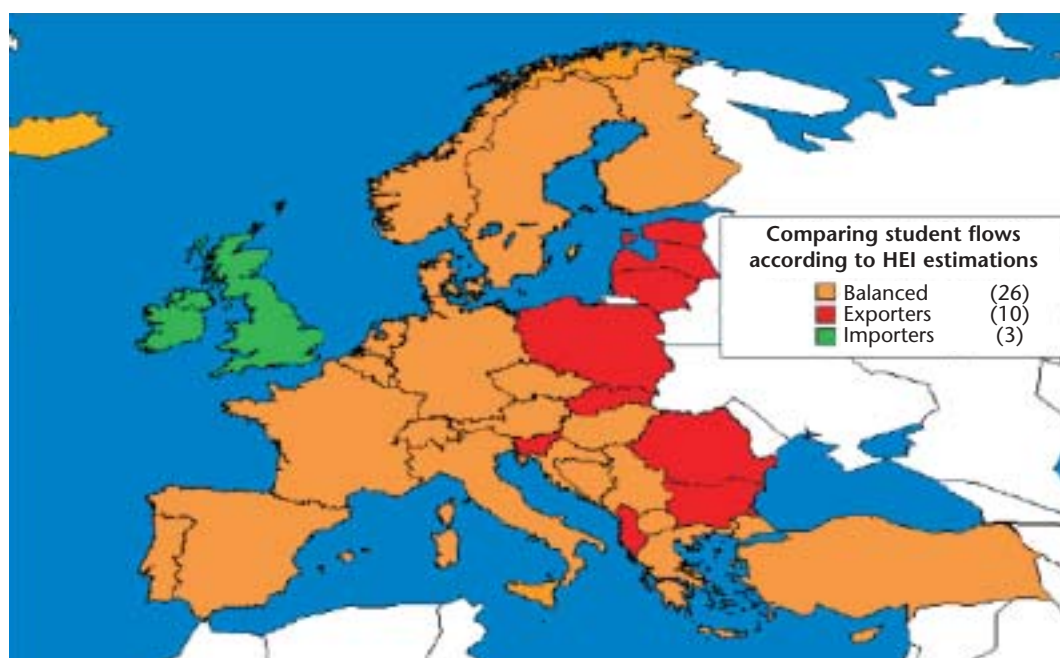
Source: Trends 2003

Figure 3 - Percentage of HEIs with more incoming than outgoing student mobility per country
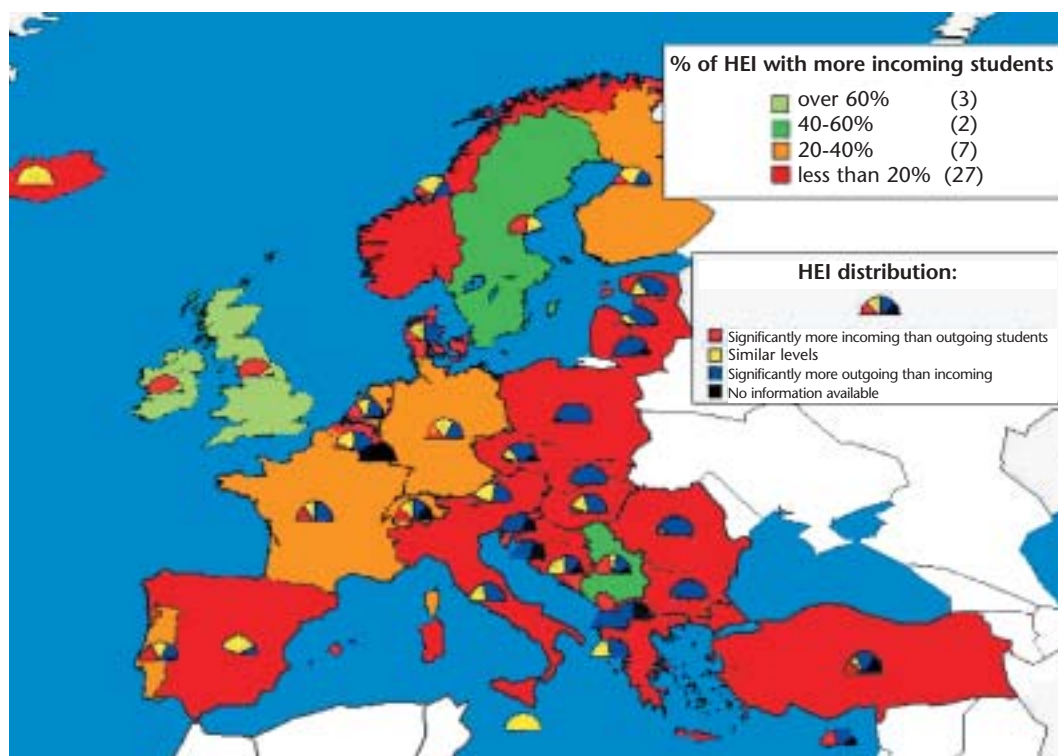
Source: Trends 2003

Despite many individual higher education representatives expressing fears about a decrease in horizontal mobility (i.e. mobility within a given degree programme) due to shorter degree cycles,[13] such fears are not shared by the majority of HEI leaders. Only 19% of these expect horizontal mobility to stagnate, only 2% fear a decrease, while 74% expect an increase. The representatives of student associations, whose judgements are presumably most authoritative on this issue, are more sceptical: 50% expect stagnation or a decrease in horizontal student mobility. Regarding vertical mobility (i.e. mobility after completion of the first cycle), 44% of all HEIs and 42% of students expect significant increases in opportunities for mobility with the introduction of a generalised two-cycle structure in Europe.

Absolute statistics on the percentage of students who have spent some period abroad during their studies, including those who went abroad outside of any mobility scheme, cannot yet be obtained for the majority of Bologna countries and are not collected on a European scale. The only European comparative study available ("Eurostudent 2000", published in 2002), with data on Austria, Belgium, Finland, France, Germany, Ireland, Italy and The Netherlands, reveals that 10% (France and Ireland) to 19% (Germany) of students have spent some foreign study-related time abroad (studies, internships or language courses), but only 3% (Italy and France) to 9% (Finland) have actually been enrolled for studies at a foreign HEI. Some comparative data on the mobility of higher education graduates from the EU has recently been published, revealing that 4-5% of highly qualified labour originates from other countries and that more than half of the "mobile" EU graduates choose to work in other countries of the European Union, but most return to their home countries after a number of years.[14]

Regarding European mobility, one should emphasise that comparable and European-wide data on mobility are urgently needed, in order to allow for monitoring of any progress in this field and for benchmarking with other regions in the world.

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13 Such fears were expressed by the institutions participating in the EUA Quality Culture Project network on implementing Bologna, for example, but also by Bologna working groups of various rectors' conferences.
14 Volker Jahr, Harald Schomburg, Ulrich Teichler, *Internationale Mobilität von Absolventinnen und Absolventen europäischer Hochschulen*, Werkstattberichte 61, Wissenschaftliches Zentrum für Berufs- und Hochschulforschung, Kassel 2002.

With the exception of Ireland and the UK, in all BP signatory countries **teaching staff mobility has increased at a majority of the HEIs**. More than two thirds of the ministries and rectors' conferences also note a significant or slight growth in teaching staff mobility over the last three years. The most recent Erasmus figures also point to a steady rise of teaching staff mobility over the last five years, with an 8% increase in the number of mobile teachers last year. Indeed, within the Erasmus scheme, there are proportionally more "mobile" teachers than students, the highest ratios of "mobile" teachers over total teacher population being noted for Finland, Belgium and Liechtenstein. Here again, a considerable concentration of most popular host countries can be observed, namely Germany, France, Spain, Italy, and the UK, which account for 52% of all incoming teacher mobility.

4.2.2 Key findings

- Public funds for mobility have increased in a majority of EU countries but only in a minority of EU accession countries.
- Both outgoing and incoming student mobility have increased. Incoming mobility has grown more in the EU than in the accession countries.
- A majority of HEIs report an imbalance of outgoing over incoming students.
- Net importers of students are most often located in France, The Netherlands, Denmark, Sweden and, most strongly, in Ireland and the UK, where 80% of the institutions report an imbalance of incoming over outgoing students.
- Teaching staff mobility has increased over the last three years in more than two thirds of the signatory countries, and at a majority of higher education institutions.

4.2.3 Future challenges

- The number and level of mobility grants for students should be augmented, especially for those from financially less privileged backgrounds, if the EHEA is not to become a space reserved for the more privileged students only.
- Comparable and European-wide data on all mobility (including free movers) is urgently needed, in order to allow for monitoring of any progress in this field and for benchmarking with other regions in the world.

4.3 ATTRACTIVENESS OF THE EHEA TO THE REST OF THE WORLD

"The vitality and efficiency of any civilisation can be measured by the appeal that its culture has for other countries. We need to ensure that the European higher education system acquires a world-wide degree of attraction equal to our extraordinary cultural and scientific traditions." (Bologna, 1999)

"Ministers agreed on the importance of enhancing attractiveness of European higher education to students from Europe and other parts of the world." (Prague, 2001)

4.3.1 Analysis

One of the main aims of the increased transparency and structural convergence between European higher education systems is to enhance the attractiveness of the European systems of higher education in the rest of the world. Indeed **most of the ministries and nearly two thirds of the rectors' conferences find this to be a driving force for the Bologna Process, ranked third after improving academic quality and preparing graduates for a European labour market**. The student associations consider this to be the main driving force for the Bologna Process.

30% of heads of HEIs believe that the added value of the EHEA, with the Bologna degree structures considered to be the most prominent ingredient in this, will have its strongest effect at the international level. 47% of HEI leaders believe, more predictably perhaps, that this added value will be most enhanced at the European level.

Given that such attractiveness is often measured by the appeal to students from abroad, one may note (see below, Figure 4) that the biggest student movements between world regions occur from Asia/Oceania to the US/Canada (302,000) or to the EU (178,000) and from Africa to the EU (120,000). Interestingly, the second largest flow of students actually occurs within one region, namely within the EU. If one combines the EU and "Other Europe" as one region, the future European Higher Education Area, the largest international student flows in the world already occur within this area (401,000). Looked at separately, however, a huge asymmetry of flows can be observed in Europe between West and East.

Figure 4 - Student migration between world regions: foreign students enrolled in tertiary education in 1999
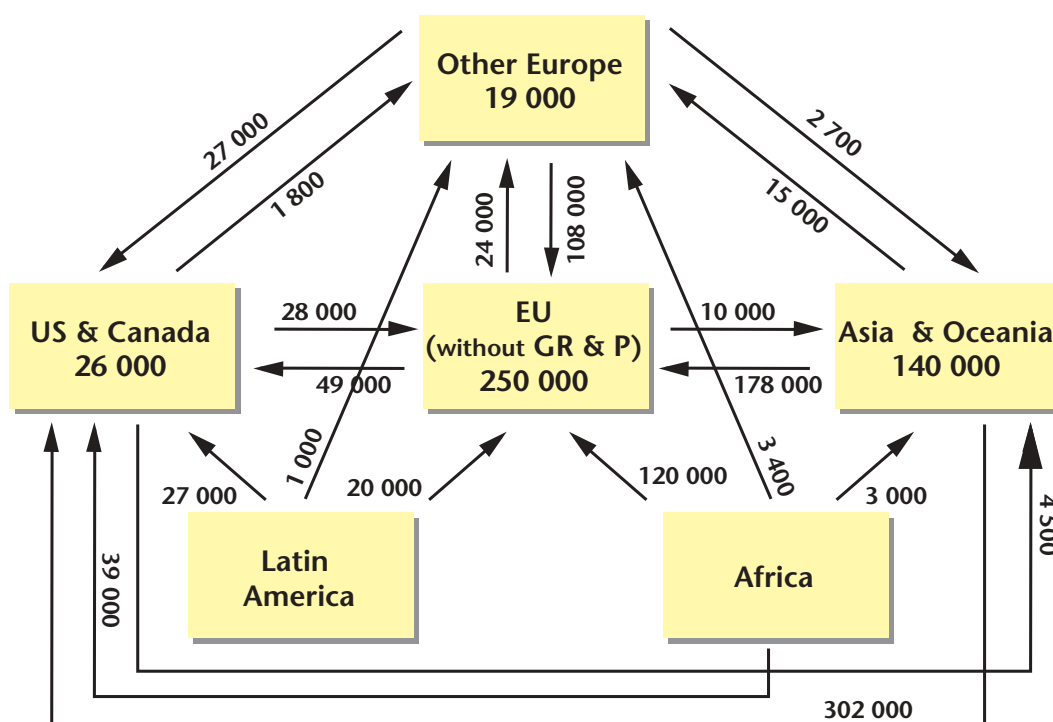
Source: DG Research, Key Figures 2002; Data: OECD

Note: The EU totals do not include Greece and Portugal. Due to limited data availability, the data for the various regions is incomplete.

Regarding the attractiveness of Europe to the other world regions, it should be noted that as yet such attractiveness is associated with the EU countries rather than non-EU countries, although such aggregates do not reveal the huge divergences between countries of those regions.

Secondly, as many readers may have expected, students from Asia and Oceania obviously find Europe considerably less attractive than the US/Canada region, with about one third more outgoing students from Asia/Oceania preferring North America than the EU (63% vs. 37%). Preferences are reversed for Africa where 75% choose to study in the EU and only 25% in North America.

How does this reality compare with European preferences? How do these existing flows compare with the priorities of the European HEIs? Asked about the **priority geographical areas** in which European institutions would like to enhance their attractiveness, **a clear preference for the EU area emerges**, mentioned by 92% of the HEIs. (The EU was least mentioned by Bulgarian, German and British institutions.) 62% of HEIs mentioned Eastern Europe as a priority area, with Turkey, Spain, Croatia, Slovenia and Romania at the bottom of this list. Combined preferences for the EU and Eastern Europe can be seen in Figure 5.

Figure 5 - Targeting Europe

This index represents the average number of positive answers by country, scaled from 0 to 10, to the question regarding the geographical areas in which each HEIs would most like to enhance its international attractiveness. Only the answers "EU" and "Eastern Europe" have been considered here. 10 means that all HEIs in the respective country wish to enhance their international attractiveness in both the EU and Eastern Europe; 0 means that no HEI mentioned either part of Europe as a target area.

Targeting Europe (HEI)	
8,09 to 10	(9)
7,7 to 8,09	(10)
7,15 to 7,7	(10)
5 to 7,15	(10)
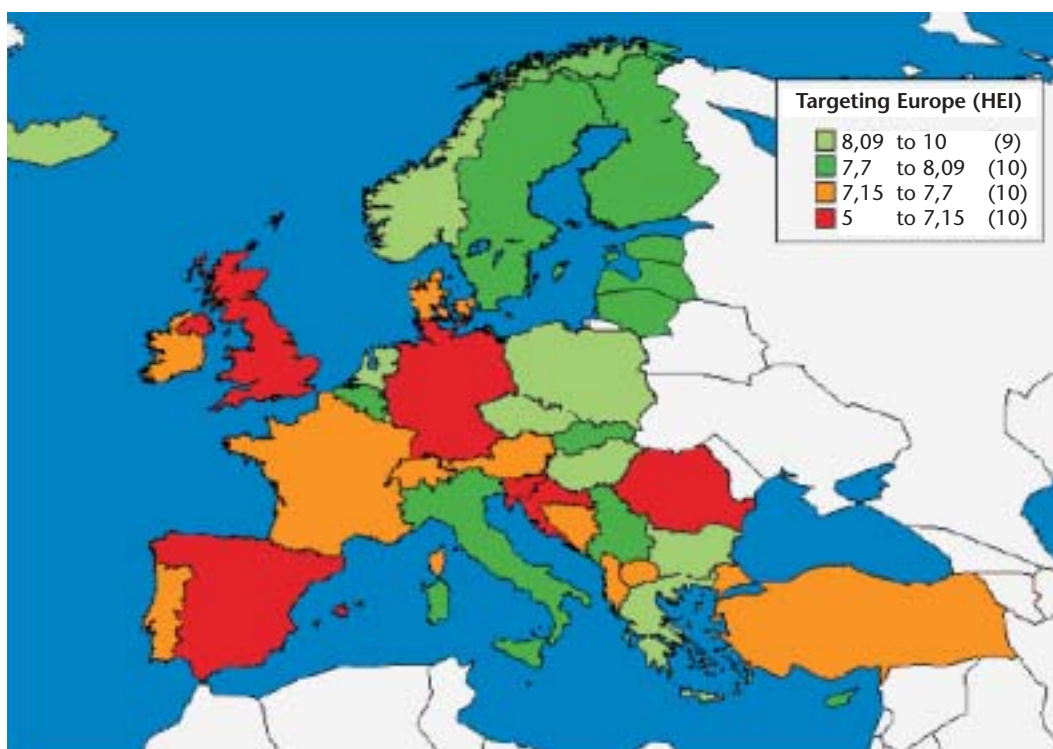
Source: Trends 2003

After a **considerable gap of 30%, US/Canada and Eastern Europe obtain comparable priority** scores. Here universities and other HEIs diverge slightly: while universities attribute the same priority to Eastern Europe as to US/Canada (60%), other HEIs clearly prioritise Eastern Europe more highly than US/Canada (63% vs. 55%). Institutions specialising in business and economics share this preference with the other (non-university) HEIs. It should be noted that US/Canada is a priority considerably more often than Eastern Europe for universities in Austria, Belgium, Denmark, Germany, Romania, Spain, Sweden and the UK.

As a fourth priority, Asia is mentioned by 46% of the universities and 35% of other HEIs. Universities with a specialisation in technology and engineering attribute a higher priority to Asia (56%). Likewise the **fifth priority area, Latin America**, is mentioned considerably more often by technology and engineering institutions (44%) than by all universities (39%) or other HEIs (27%). **Africa, Australia and the Arab World are the lowest priority areas**, all mentioned by less than 25% of HEIs. Again universities and other HEIs diverge in their priorities: while universities attribute comparable priorities to the three areas (Africa 26%, Australia 24% and Arab World 23%), the other HEIs clearly attribute higher priority to Africa and Australia (23% and 22%) than to the Arab World (only 11%).

The rectors' conferences and ministries reveal the same series of preferences as the HEIs in promoting the attractiveness of their national HE systems. The only exception is a higher priority attached to the Arab World by the rectors' conferences in Bulgaria, France, Greece, Hungary, Ireland and Italy, and by the ministries in France, Greece, Latvia, Malta, Romania and the UK.

Figure 6 - Priority areas of European HEI (2003)

Source: Trends 2003
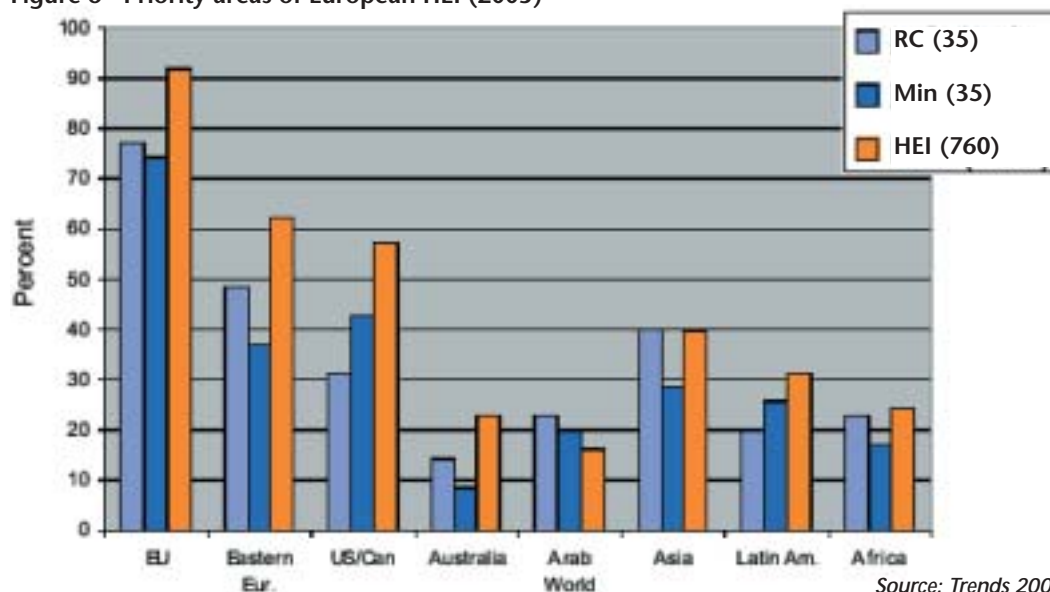
In order to promote attractiveness in these priority areas, joint programmes are clearly the preferred instrument, being mentioned by three quarters of all HEIs. Scholarships for outgoing student mobility is mentioned by two thirds of HEIs, with scholarships and study places for incomers only by a third. Inter-institutional partnerships and collaborative arrangements are mentioned by 57%. At ministry level, offering scholarships for incoming and outgoing students from/to these areas is the most prominent promotion instrument provided. Half of the rectors' conferences support new programmes taught in English or another major European language (slightly fewer ministries mention this instrument). More than half of the HEIs offer new programmes in English or another major European language.

Only a third of the rectors' conferences and slightly fewer ministries apply targeted marketing techniques for student recruitment. Such marketing initiatives are being undertaken by the ministries or rectors' conferences of Belgium (FL), Germany, Finland, France, Ireland, The Netherlands, the United Kingdom, Latvia, Hungary, Poland, Malta, Slovenia and Romania. The most prominent marketing initiative is perhaps the "Prime Minister's Initiative" in the UK, a national strategy aimed at attracting international students, which is promoted through a worldwide campaign launched under the brand of *EducationUK*. (In addition, higher education in the UK is promoted through the worldwide offices of the British Council, the UK's international organisation for educational and cultural relations, as well as through the involvement of the HE Funding Council for England, the Universities and Colleges Admissions Service, the Quality Assurance Agency, the Association of Commonwealth Universities and the UK NARIC.)

Only 30% of HEIs mention the use of targeted marketing for recruiting students. Notable exceptions are Ireland and the UK, where more than 80% of universities conduct targeted marketing, in addition to the manifold marketing activities at national level and the already high level of incoming students from abroad. In The Netherlands, Slovakia, Cyprus and Romania, targeted marketing is also used by a majority of institutions, as can be seen from Figure 7.

One should note that a majority of countries have developed national brain drain and brain gain policies. Ministries or rectors' conferences reported on schemes to prevent brain drain from their countries (namely Bulgaria, Croatia, Cyprus, Germany, France, Hungary, Lithuania, Poland, Romania, Slovenia, Spain, Switzerland and the UK), and to promote brain gain into their countries (Austria, Cyprus, Estonia, Finland, Germany, Ireland, Italy, Malta, The Netherlands, Poland, Slovakia, Slovenia, Sweden and the UK). However, only four countries say they have developed policies to prevent brain drain from other countries into their own, these being France, Greece, Norway and the UK.

Figure 7 - Use of targeted marketing by HEIs in Europe
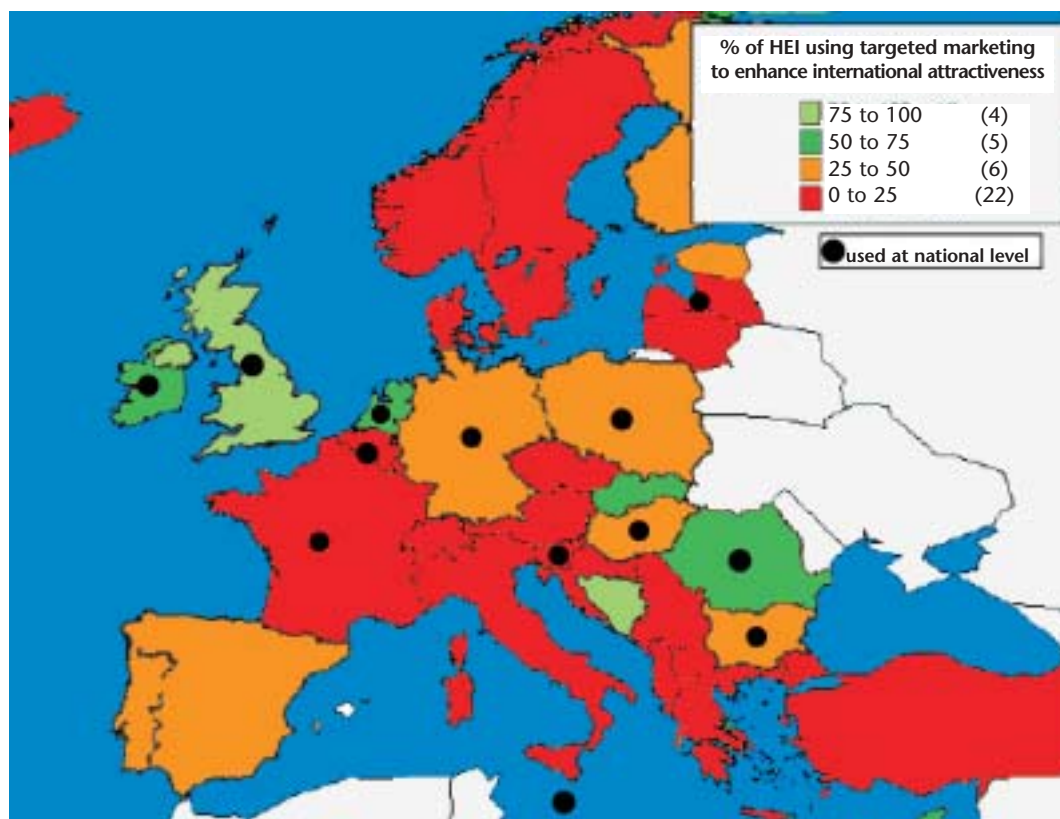
Source: Trends 2003

4.3.2 Key findings

- Enhancing the attractiveness of the European systems of higher education in the rest of the world is a driving force of the Bologna Process, ranked third after improving academic quality and preparing graduates for a European labour market.
- The EU is by far the highest priority area for most institutions (mentioned by 92%). The second priority is Eastern Europe (62%), followed by US/Canada (57%), Asia (40%), Latin America (32%), Africa and Australia (24% and 23%) and the Arab World (16%).
- In order to promote their attractiveness in the priority areas, joint programmes or similar cooperation activities are clearly the preferred instrument (mentioned by three quarters of all HEIs).
- Only 30% of HEIs mention the use of targeted marketing for recruiting students, the notable exceptions being Ireland and the UK where more than 80% of universities conduct targeted marketing.
- A majority of countries have developed national brain drain prevention and brain gain promotion policies.

4.3.3 Future challenges

- Most HEIs still have to define their own institutional profiles more clearly in order to be able to target the markets which correspond to their priorities. In the competitive arena of international student recruitment, HEIs will not be able to avoid targeted marketing techniques if they want to position themselves internationally, even if such efforts may go against the grain of established academic culture and habits.

4.4 HEIs: INCUBATORS FOR COMPETITIVENESS OR GUARDIANS OF A PUBLIC GOOD?

As the Bologna Declaration sets out, Ministers asserted that building the European Higher Education Area is a condition for enhancing the attractiveness and competitiveness of higher education institutions in Europe. They supported the idea that higher education should be considered a public good and is and will remain a public responsibility (regulations etc.), and that students are full members of the higher education community.[…] Ministers also reaffirmed the need, recalled by students, to take account of the social dimension in the Bologna Process. (Prague Communiqué, 2001)

4.4.1 Analysis

Several recent global developments have contributed to a growing awareness among many students, academics, and higher education officials that the social and public functions of higher education may soon be at stake. Various factors such as the emerging global market for higher education - brought to the fore most recently in the framework of the re-opened round of the World Trade Organisation's (WTO) General Agreement on Trade in Services (GATS) negotiations - the emergence of for-profit providers, the growing presence of institutions of higher education working across national borders, as well as the partial retreat of governments from higher education funding, have raised questions as to the role and responsibilities which higher education institutions should have in society, the conditions needed to perform such a role, and the role of the State in relation to higher education.

The drive for a European Higher Education Area has emerged from decades of intense cooperation between European HEIs. And yet, the fact that governments have initiated the Bologna Process clearly has to do with a sense of threatened competitiveness vis-à-vis prime competitors like the US, rather than from sheer enthusiasm for the increasing intensity of cooperation within European higher education. Thus, the basic fabric of the Bologna Process is woven from two co-existing threads, cooperation and competition. Clearly, both dimensions are needed for the sustained vitality of the process, but the question of the right balance between competition and cooperation resurges again and again in public debates on higher education in Europe.

In an academic arena, it is well established that your closest cooperation partners, helping you to compete against others, can also be your prime competitors in other projects and contexts. This is true in research but also in institutional positioning. But the potential conflict between cooperation and solidarity, on the one hand, and competition, on the other, is currently re-emerging with renewed vehemence as higher education is facing fundamental value choices in the light of constantly decreasing public funds. In an attempt to concentrate on the most urgent needs for development, institutions have to decide how to ensure that widened access, diversified provision and concentration of excellence are compatible functions within the same institution, or whether to pursue one of these to the detriment of the other.

Most countries have witnessed and fostered growing participation in higher education, as a recipe for increased individual, social and economic welfare. Growing participation entails flexible access, diversified student bodies, attention to individual learning paths, breaking down the internal barriers which have contributed to the universities' traditional status in society. At the same time, global competition in research and technology transfer makes concentration of excellence and selective support of the proven strong players seem the most efficient and promising path to follow. Thus, for higher education institutions, the challenge consists in creating the optimal environment for the best and giving them all the support they need to excel nationally and internationally, while offering flexible open access to as many students as possible, with diversified levels of performance and diversified attention needed to accommodate these different levels and backgrounds. All of this has to be achieved with decreasing state funds and increasing demands from new funders who may be indifferent about the many varied public functions which HEIs are trying to perform.

On the one hand, HEIs have to develop an institutional culture and management which is able to select those areas, institutions, departments, researchers and students that show the clearest

potential, because they have to focus their efforts in times of budget constraints and to ensure that the strong do not lose the international race because they are held up by the weak.

On the other hand, HEIs should also contribute to building a society in which equality of opportunity is taken seriously and in which multiple measures to optimise these opportunities are pursued, including for those who have not benefited from privileged starting points.

In a European Higher Education Area, this issue of solidarity also applies to the relation between countries and institutions. Building up potential, performance and competitiveness in those countries that have suffered from the most serious political, social and economic constraints on creative freedom in higher education, and are still suffering from the after-effects, is an essential ingredient of the value system of the European Union, the Council of Europe, the EUA and many other bodies.

Events since the Prague Conference in 2001

What actions have been taken, what consensus has been reached, since the Prague Communiqué of 2001 highlighted the social dimension of higher education and the value of higher education as a public good? What actions have been taken to build up the competitiveness of the European Higher Education Area? To answer the latter question we may point to all the initiatives reported in the other sections of this report, since these are all meant to contribute to the overall goal of enhancing the competitiveness of Europe. But to answer the former question, we should point to some separate events and actions which are not presented elsewhere in this report.

First and foremost, at the initiative of the student associations (ESIB in particular) and Greece, a Bologna follow-up seminar was organised on the topic of the social dimensions of the European Higher Education Area. Several issues were addressed under this heading:

• the social conditions of studying, including the topics of flexible and open access to HE, and obstacles to equal opportunity incurred by the existence of tuition fees;
• the social conditions of, and obstacles to, student mobility;
• the social and public value of higher education, which should not be reduced to the mere pursuit of economic welfare and competitiveness;
• and the implications of GATS for the idea of HE as contributing to the public good and as a public responsibility.

The Athens conclusions [15] reaffirm the position that higher education should be seen as a contributor to the public good and treated as a public responsibility, ensuring wide access to higher education, continued public support and efficient use of these resources by HEIs. The need for enhanced quality assurance procedures, in conditions of widened access, and regulatory frameworks, given the emergence of many private for-profit institutions of higher education in Europe, was also emphasised in this context. Social and financial support schemes, including loans and portable grants, and improved academic and social counselling were highlighted as conditions of wider access to higher education and to student mobility, as well as a decisive success factor in achieving improved graduation rates.

It was pointed out that the influence of such support on access, mobility and student success rates is widely acknowledged, but has not yet been researched sufficiently, as a recent first attempt to describe student social and financial conditions in a European comparative perspective has made evident.[16] Considering the competition for public funding between HE and other public services, such as health care or pension rights, it was stressed that HEIs would have to make it clearer to public authorities, parliaments and governments, how vital the contribution of HE graduates and HE-based research has become to national and global social and economic welfare.

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15 See http://www.bologna-berlin2003.de, Bologna Seminars.
16 *Eurostudent 2000*, HIS, 2002, op.cit..

The central concern of financial discrimination regarding access to higher education is widely supported by evidence from a large number of European countries. If we look at the situation in the countries of Central and Eastern Europe (CEE), we should note the particularly rapid expansion of participation rates during the 1990s. Current access requirements are the upper secondary school leaving certificate plus entrance examinations in most countries, normally set by the institution or the departments (exceptionally by the government). However, in most countries, some sort of *numerus clausus* applies, often for the state-financed study places. Additional study places are usually available for fee-paying students.

Vehement opposition to the possible discrimination between students on the basis of their private wealth is raised in Northern and Western Europe, both by individual governments and most strongly by student associations. Thus, the Swedish ministry of education recently re-emphasised the principle of studies without fees for individual students, even in the context of contracted training programmes which universities might organise at the request of clients from outside the EU and EEA.[17]

Discrimination between different types of students on the basis of their nationality is also known in EU countries, with different levels of tuition imposed on students on the basis of their country of origin. A well-known example is the UK, where non-EU students are charged significantly higher tuition fees than nationals and other EU-citizens, and where considerable efforts are made to recruit such non-EU students because of the additional income they bring to the institution. (We have already noted the significant engagement in HE marketing by HEIs in the UK.) But many other countries, even where tuition fees are still unacceptable for public undergraduate HE courses (with the exception of small administrative fees, which have already caused major uproar), are also introducing the possibility of generating income by fees from foreign Master-level students (e.g. in Germany).

The meaning of GATS for higher education

The debate on the respective advantages of treating HE as a contributor to the public good or as a competitive field of individual actors with particular interests has gained currency due to the new round of GATS negotiations which began in 2000. The General Agreement on Trade in Services is the multilateral trade agreement organised by the World Trade Organisation designed to liberalise the global economy, removing obstacles to free trade.[18] Higher education was already included in the 1994 round of GATS negotiations but has assumed a much more prominent and highly disputed position in the current round.

The GATS is almost universal in scope and coverage, according to Article I.3 of the Agreement, but it excludes "services supplied in the exercise of governmental authority" (with the additional requirements that the service be provided on a non-commercial basis and that no competition be involved). Far-reaching agreement has been obtained among higher education representatives in Europe on the opportunities and threats implied by the inclusion of higher education services in further trade liberalisation, a consensus which is reflected in a number of common declarations of European organisations and various communications from national rectors' conferences.[19] Considerable differences remain, of course, as to the weight attributed to the individual points.

Among the **opportunities associated with the GATS** and the associated further increase in competition in services, the following are often mentioned:

• The qualitative review of teaching and learning is put at the center in the context of GATS debates.

17 Summary of government bill 2001/02:15, U01.016 November 2001.

18 For general information about the EU and GATS, see http://gats-info.eu.int and http://europa.eu.int/comm/trade/wto_overview/ index_en.htm. Several position papers have been formulated by national and European agencies, including the EUA. For a compilation of these positions see http://www.unige.ch/eua/En/Activities/WTO/welcome.html. The specific country commitments in HE can be acceded under http://gats-info.eu.int/gats-info/swtosvc.pl?&SECCODE=05.C.

19 The Joint Declaration of the EUA with the American Council on Education (ACE), the Association of Universities and Colleges of Canada (AUCC), and the Council for Higher Education Accreditation (CHEA), as well as the Joint Declaration of the EUA with ESIB "Higher Education on the Move", can be found on the EUA website, http://www.unige.ch/eua.

- The concentration on high-level programmes will be encouraged further in order to optimise market survival.
- The development of joint programmes and consortia to face competition together is likely to increase.
- The quality of information to the public, potential users and partners is likely to increase.
- More pressure will be exerted for the efficient use of financial and human resources.

Critics point to the following **threats posed by the inclusion of HE in the GATS**:

- National authority could be undermined since the negotiations fall under the purview of the EU's DG for Trade and the European trade regulations, while higher education is still governed by the principle of subsidiarity.
- Sectorial authority is being undermined by the fact that the EU commissioner and ministers of trade negotiate within the GATS, including higher education offers, with no mandatory consultation of representatives of the higher education sector. Moreover, transparency regarding the progress of negotiations is limited since no negotiators want to weaken their position by revealing their negotiating fields, limits or tactics.
- Increased competition and commercialisation to secure market advantage might undermine the Bologna Process which depends on cooperation and exchange of good practice.
- The competition may result in brain drain and reduced opportunities for community-building and democratic development in some countries.
- The increased market orientation of higher education may run counter to core academic values, the recognition of students as partners rather than customers and the commitment to widened access as a mechanism for social, political and economic inclusion.
- Since only some processes and functions of HE would fall under the GATS regime, there is a risk of fostering institutional fragmentation within higher education institutions, with part of an institution's activities falling within the GATS regime while others do not. This would make institutional steering very difficult and would weaken the strategic capacity of institutions.
- Finally, the increase of for-profit providers and for-profit activities of public higher education institutions would result in further decreases in state funding and the erosion of European higher education as a public sector activity. Those parts of the university which operate in more competitive or lucrative spheres, which may be more entrepreneurial than others, and which are net generators of income, are often currently used to help support other parts of the university which may engage in non-commercially viable activities such as contributing to regional and community development, widening participation and encouraging social inclusion. With a widening influence of GATS such lucrative activities may be favoured over others.[20]

The recommendations of EUA, various national rectors' conferences, ESIB and the official Bologna follow-up seminar all stress the need for increased transparency in the GATS negotiations, for well-developed national and regional quality assurance frameworks and increased mutual acceptance among these to face further globalisation, the need for establishing specific transnational procedures, for respecting the integrity of higher education institutions and the centrality of students as partners. The priority of ongoing agreements and cooperation initiatives, such as the Lisbon Convention and the Bologna Process, has been repeatedly underlined, together with their centrality for internationalising higher education and respecting quality concerns and national differences.

Generally, these discussions on GATS and the social dimension of higher education have continuously reaffirmed that the main objective driving the creation of a European Higher Education Area and the internationalisation of higher education on a global level, should first and foremost be based on academic values and cooperation between different institutions, countries, and regions of the world.

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20 The preceding list of opportunities and threats has been based on the summaries provided in an EUA working document on GATS for the EUA Council by Andrée Sursock (10 October 2002) and a presentation on European Higher Education in a globalised world by Peter Scott and Frans Van Vught for the same Council Meeting (10/10/2002). Similar arguments can be found in the above-mentioned joint declarations as well as in EUA, ESIB and national discussion papers The ESIB website also has numerous additional information and legal opinions: http://www.esib.org.

Since the discussion on GATS is often clouded by wrong assumptions and expectations, three basic facts should be recalled:

The question is not whether higher education should be regulated by the GATS or not: it was included into the Agreement eight years ago and this decision is, to all practical intents and purposes, irreversible.

The European Commission has stated that it will make no further request regarding higher education in the current round of negotiations, except that it asks the US to open its market to European HEIs (i.e., to make concessions comparable to those already made by the European Union in 1995).

The issue of trade in higher education is here to stay and will reappear on the agenda of subsequent rounds of GATS negotiations. Ministries in charge of higher education and HEIs should keep this in mind and prepare themselves to ride the tiger of globalisation rather than to hope it will disappear.

It can be expected that the *Global Forum on International Quality Assurance, Accreditation, and the Recognition of Qualifications in Higher Education* which UNESCO established in September 2002 will continue to provide an important forum for higher education stakeholders to discuss GATS-related developments.[21]

Different levels of awareness of GATS

Unlike the round of GATS negotiations in the mid-90s that went largely unnoticed by the main actors in higher education, the present GATS talks caused a flurry of reflections, rumours and discussions. Lack of transparency and information on GATS has been one of the most frequently voiced criticisms, since staff and students, even the rectors and ministerial representatives felt taken by surprise when the issue emerged. The *Trends 2003 questionnaire* therefore asked the various actors about their knowledge of GATS and their involvement in national GATS discussions.

One third of the ministries have developed a policy on GATS, while two thirds have not yet done so. 22 of the 36 ministries are in dialogue with their country's ministry of trade, 13 with national HEI bodies, nine with student organisations and four with their ministry of foreign affairs. Six ministries said they had not discussed GATS with any partners.

As for the rectors' conferences, 14 out of 36 declared themselves fully aware of the GATS issue, while 18 said they were aware but without specific details. 13 rectors' conferences have a policy on GATS and 21 do not – which is surprising, as the EUA position paper on GATS was approved in September 2001 by the rectors' conferences that are EUA members.

22 rectors' conferences are in dialogue with their country's HE ministry, eight with their country's ministry of trade, ten with national HE bodies and seven with national student associations. Ten rectors' conferences have not exchanged views on GATS with any national partners.

A rather high percentage of HEI leaders – 19% – declared themselves to be fully aware of the GATS negotiations, almost half of the HEI leaders consider themselves to be aware without having specific details, and 29% said they were not yet aware of GATS. The largest numbers of such leaders fully aware of GATS can be found in Belgium and The Netherlands (58%) and the UK (41%). Few HEI leaders declared themselves to be fully aware in France and Latvia (14%), Hungary (13%), Germany and Greece (10%) and Bulgaria and Poland (8%).

Above average percentages were aware without any specific details in Sweden (53%), Greece (55%), Spain (57%), Germany (65.5%), Slovenia (67%), Estonia (71%) and Romania (73%).

21 http://www.unesco.org/education/studyingabroad.

More than 50% of HEI leaders in Bulgaria and Turkey declared they were not yet aware of GATS. As an interesting detail one might add that awareness of GATS seems to be particularly low among those HEIs specialising in business and economics. Only 15% of their leaders were fully aware of GATS, compared to 19% at all HEIs and to 26% at universities only. Aware without specific details was answered by 32% of business and economics institutions (universities: 50%, other HEIs: 43%), and not yet by 44.5% of business and economics institutions (universities: 19.5%, other HEI: 36%).

It came as no surprise that students seem to be the best informed group: 17 out of 37 student associations declared themselves to be fully aware of GATS discussions, while 13 feel aware without having specific details, and only five feel they are not yet aware.

4.4.2 Key findings

- The conflict between cooperation and competition is growing as HEIs are faced with decreasing funds. They can try to combine widened access, diversified provision and concentration on excellence, but often have to pursue one option to the detriment of the others.
- In the European Higher Education Area, the issue of solidarity also applies to the relation between countries.
- A large consensus appears to exist in the EHEA regarding higher education as a contributor to the public good and a public responsibility.
- Only one third of the ministries have developed a policy on the position of higher education in the GATS. The situation is similar for the rectors' conferences.
- Almost 20% of HEIs declared themselves to be fully aware of the GATS discussions, almost half of the HEIs consider themselves to be aware without having specific details, and 29% said they were not yet aware of GATS. There are considerable differences between countries.
- Students' associations seem to be well aware of GATS.

4.4.3 Future challenges

- There is a growing need for enhanced quality assurance procedures and regulatory frameworks, given the emergence of cross-border institutions in Europe.
- Social and financial support schemes, including portable grants and loans, and improved academic and social counselling are conditions for wider access to higher education, more student mobility and improved graduation rates.
- More research is needed into the social and financial conditions of students in a comparative European perspective.
- In competing with other policy areas for public funding, HEIs must convince parliaments and governments of the vital contribution of HE graduates and HE-based research to social and economic welfare.
- There is a need for more transparency and consultation of HE representatives in the ongoing and future GATS negotiations.
- It would probably be beneficial for all if ministries of higher education, rectors' conferences and HEIs agreed on a regular exchange of information and policy coordination with regard to GATS, transnational education, etc. Ministries of trade, foreign affairs and other stakeholders should equally be involved.

5. THE EUROPEAN HIGHER EDUCATION AREA: TOWARD COMPARABLE STRUCTURES

5.1 DEGREE STRUCTURES

Adoption of a system of easily readable and comparable degrees, also through the implementation of the Diploma Supplement, in order to promote European citizens' employability and the international competitiveness of the European higher education system.

Adoption of a system essentially based on two main cycles, undergraduate and graduate. Access to the second cycle shall require successful completion of first cycle studies, lasting a minimum of three years. The degree awarded after the first cycle shall also be relevant to the European labour market as an appropriate level of qualification. The second cycle should lead to the Master and/or doctorate degrees as in many European countries. (Bologna, 1999)

5.1.1 Analysis

The legal framework for degrees: Bologna-compatible in most countries

A superficial notion of the Bologna Process might suggest that the creation of a system of easily readable and comparable degrees, based primarily on undergraduate and graduate cycles, is what "Bologna" is really all about. The question of cycles and degrees is undoubtedly at the very heart of the reforms, but singling them out – because of their visibility – and treating them separately from the other objectives would be a very myopic view indeed. "In most cases the reforms combine the introduction of a new Bachelor/Master degree structure with a credit system and a system of certification of the quality of the new programmes ('accreditation')."[22] This analysis from the *Trends II* report already indicated that the national reforms seemed most promising where a comprehensive and thorough approach was taken. Two years later, the reform train is gathering steam and speed almost everywhere in Europe, and it is becoming even more obvious that all the different aspects of the process are closely interrelated – curricular reform, credit systems, comparability, recognition, quality assurance and so on – and can be successfully tackled only in a consistent and comprehensive way.

Thus the mere act of introducing a two-tier degree structure can only be a very first step toward a transparent system of degrees. So far, relatively little attention has been paid to the need for common definitions of degree requirements, work loads, level descriptors etc. All Bologna countries have initiated some reforms, often concentrating on matters that were deemed particularly urgent from a national perspective.

However, as the reform moves along, it becomes clear that the emerging solutions bear the risk of creating new incompatibilities and that, once a certain level of comparable structures has been reached, the horizon opens onto an entirely new set of challenges such as defining transparent and comparable "level descriptors", "learning outcomes", "qualification frameworks" and so on.

What does the legal situation look like?

Since the Prague Conference, noticeable progress has been made in this respect in many countries. More than half (19) of the ministries indicated that they have changed their higher education legislation since 2001 and a further 40% said they had plans to do so. In many cases, these legal changes relate to the types and structures of degrees.[23]

Around 40% of the ministries reported that there was a two-cycle structure in their national higher education systems even before the Bologna Declaration. This group spreads all across Europe and includes, apart from the UK, Ireland and Malta, for instance Bulgaria, the Czech Republic, Denmark, Latvia, Poland, Turkey and Greece.

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22 Guy Haug, Christian Tauch, *Trends in Learning Structures in Higher Education II*, Helsinki 2001, p.31.
23 New higher education laws have, *inter alia*, been adopted in Austria (August 2002), Belgium (Fl., April 2003), France (April 2002), Norway (July 2002), Spain (December 2001).

Other ministries also indicated that their countries had two cycles before the beginning of the Bologna Process, but that they are now working to adjust them to the emerging consensus on degree structures in the EHEA, as expressed e.g. in the Helsinki seminars on Bachelors (in 2001) and Masters (in 2003). This is true for Belgium, Croatia, Finland, France, Norway, Portugal and Serbia.

In some cases this implies very radical and far-reaching changes, as in France, where the traditionally most important final university degree, the *maîtrise* at 240 ECTS credits, is to give way to a Master degree at the 300 credits level. The *Conférence des Grandes Ecoles* has decided to create an MSc label as a special "quality label" to distinguish the Master degrees awarded by its members from the other Master degrees.

Some ministries indicated that their countries were introducing the two cycles as a result of the Bologna discussions, e.g. Austria, Estonia, Italy, Liechtenstein, The Netherlands, Romania and some SEE countries. In other countries, like Germany, Denmark and many of the CEE countries, the Bologna Process coincides with a national reform process that had already started before 1999.

Finally, certain countries declared that they do not have a two-cycle structure yet but that the introduction is planned, e.g. Hungary, Slovenia, Spain, Switzerland and some SEE countries. In Switzerland, the approach to implementation differs from the European norm in that actions at national level are issued in the form of coordinating directives rather than legislation. Thus Switzerland has already started the implementation without any legal changes having been introduced in the HE laws,[24] and some higher education institutions are already in the process of converting some or all of their study programmes to the new type. The recently established *Fachhochschulen* are planning to follow suit shortly.

Figure 8 - Implementation of Bachelor/Master structures according to ministries

This map reflects the answers of the ministries to the question of whether or not the national higher education system already has a degree structure based on two main cycles in place. Thus a country which is in the process of implementing such a structure without having introduced national level legislation will have answered "Not yet, but the introduction is planned" (as is the case in Switzerland). To reflect the overall HE system, this map should be seen in conjunction with Figure 9 where the percentages of institutions which have already introduced Bachelor/Master degrees in a majority of departments are given.

Does your higher education system have
a degree structure based on two main cycles (Bachelor and Master)

■ No yet, but the introduction is planed
■ Yes
■ Yes, we are adjusting a previous two-level structure to suit
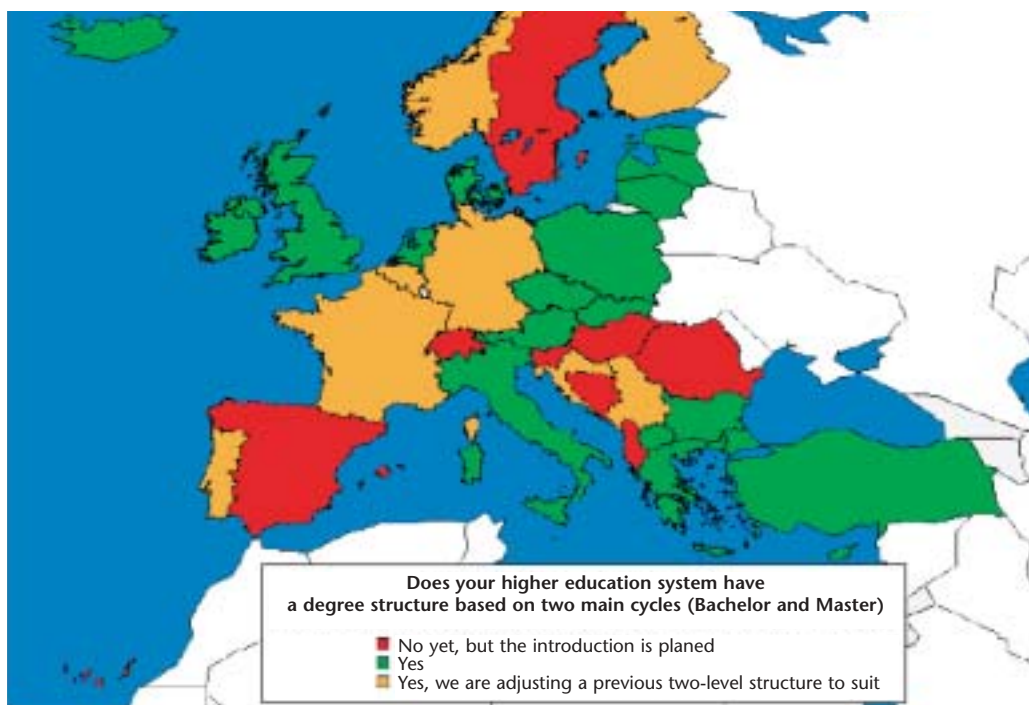
Source: Trends 2003

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24 The Swiss government entrusted the *Conférence des Recteurs des Universités Suisses* (CRUS) with the implementation of this reform. See *Directives de la CRUS pour le renouvellement coordonné de l'enseignement des hautes écoles universitaires suisses dans le cadre de Bologne*, CRUS 02 215, décembre 2002.

In Spain in February 2003, the ministry presented a detailed proposal to the Council for University Coordination on how to adjust the traditional Spanish system to the two-cycle model and a very lively and constructive discussion among the representatives of governments and HEIs is presently taking place.[25] A new law in the Flemish Community of Belgium (April 2003) provides for the intro-duction of Bachelors and Masters.

Often the legislation fixes a deadline after which no study programmes of the old type will be accredited/authorised any more, or by which the transition to the two-tier system must be com-pleted. France, for instance, expects the reform, adopted in April 2002, to be completed in the universities by the academic year 2005/06. In Italy, where the transformation of the system started with the academic year 2001/2002, the reform is now fully operational. The reform of degree structures in Norway should be completed by the end of 2003. The new Austrian University Act of 2002 allows only new programmes of the two-tier type.

Relatively few countries leave the introduction to HEIs on a purely voluntary basis, as in Poland. In Germany, it is still left entirely to the discretion of the institutions and their departments whether to introduce the new system, keep the previous (traditional) system or run the two in parallel. Obviously the latter solution puts considerable strain on the institutions' resources and may have a confusing effect on both students and employers, as HEIs themselves seem to doubt the validity of the reforms undertaken.

Some countries have set up expert committees to work out proposals for a higher education reform along the Bologna lines, and the decisions now need implementation. This is true e.g. for Finland where the experts proposed that the two-tier structure should be implemented in all disci-plines by August 2005, with Bachelors of 180 and Masters of 120 ECTS credits.

Generally speaking, the legal possibility to offer programmes of the undergraduate/graduate type either exists or will exist soon in all Bologna countries. No ministry rejects the idea altogether – as was to be expected in a process to which they adhered voluntarily.

Growing agreement on the duration and workload of undergraduate and graduate cycles

Ministers in Prague welcomed the conclusions of the Conference held in Helsinki in February 2001 on undergraduate degrees. The conclusions contained a recommendation that such degrees should carry between 180 and 240 ECTS credits, equalling 3 to 4 years full-time study. Such a first degree, awarded after a relatively short period of study, was indeed unknown in many continental European higher education systems. Almost everywhere, however, they are now being introduced in a consistent way, always respecting the Helsinki recommendation regarding the length. To quote but one example: Hungarian universities used to offer only long one-tier programmes of 5 to 6 years and are now introducing a 180 (first cycle) + 120 (second cycle) ECTS credits structure.

Across Europe, there is a clear trend toward attributing 180 ECTS credits for first cycles, but 210 and 240 can also be found. While no problem seems to exist with regard to undergraduate degrees that are too short – anything under 180 credits is recognised everywhere as belonging to the sub-degree level, there are still a few countries that offer undergraduate programmes that are too long in comparison to the emerging norm: either because they carry more than 240 credits or because they are combined with long postgraduate degrees (e.g. 240 + 120). This is e.g. true for Slovenia, but also for a few other countries, especially in Central and South East Europe. In the higher education traditions of these countries, there seems to be a deep conviction that no valid higher education qualification can be awarded after three years, notwithstanding the positive experiences of many other systems. This is inevitably going to increase the pressure on the resources available for HEIs in these countries.

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25 *La integración del sistema universitario español en el espacio europeo de enseñanza superior*, Documento-Marco, Ministerio de Educación, Cultura y Deporte, Febrero 2003.

Regarding graduate degrees at Master level, a recent study by Andrejs Rauhvargers[26] has shown that although there is still a significant variety in duration and architecture, there is a dominant trend toward Master level degrees requiring a total of 300 ECTS credits. These Master degrees can be awarded either at the end of long integrated programmes or, in two-cycle structures, at the end of the second cycle. The Conference held in Helsinki in March 2003 on Master degrees recommended the following: "While Master degree programmes normally carry 90 – 120 ECTS credits, the minimum requirements should amount to 60 ECTS credits at Master level. As the length and the content of Bachelor degrees vary, there is a need to have similar flexibility at the Master level."[27]

The most common pattern appears to be: 180 credits Bachelor + 120 credits Master. The Master degree can also carry less than 120 credits, depending on the length and content of the Bachelor programme, but a minimum of 60 credits at postgraduate level has to be respected. Some countries, such as Sweden and the Netherlands, also offer the combination 180 credits Bachelor + 60 credits Master.[28] Under the influence of the Bologna Process, however, at least Sweden seems to be reconsidering this structure: a discussion is presently taking place on the definition of undergraduate and graduate levels of degrees so as to ensure compatibility of Swedish degrees with those of other European countries. The Ministry has appointed a project group to this end.[29]

In the UK, a one-year Master degree typically carries the equivalent of 75 or even 90 ECTS credits since the workload is calculated on the basis not of two semesters but a full calendar year. This interpretation continues to be a matter of discussion between British and continental HEIs.

The study also confirmed that medicine and related disciplines still require a different scheme in many countries, namely long integrated programmes of 300 or more ECTS credits, but these are exceptions to the converging trend across Europe in most other disciplines.

How much of the legal reforms has reached the institutions?

As one would expect, there tends to be a gap between the stipulations in the rather recent legal changes and the institutional reality. Nevertheless, the average figures at institutional level look quite impressive: one third of institutions declared that they already had a two-tier structure before the Bologna Process, and 21% have introduced it as a result of Bologna. More than 36% intend to introduce it and only a small minority (7.5%) say they have no intention of doing so.

However, depending on the country, the number of institutions that have already embarked on the often long and winding process of structural reform is often smaller than the legal situation might suggest. A differentiation by types of institutions shows that almost two thirds of the universities already had or have introduced two cycles, but only 46% of other HEIs.[30] Business and economics institutions are particularly active in that regard (almost 60%), while engineering and technology institutions seem a bit more hesitant (around 45%).

Occasionally, there seems to be a different perception between ministries and higher education institutions regarding the reform process. Thus, while the Dutch ministry indicated that the two tiers are being introduced as a result of the Bologna Process, more than 40% of the Dutch HEIs indicated that they had them already before Bologna (while 50% declared that they had introduced them or were introducing them as a result of Bologna). The opposite situation may be less surprising: in Bulgaria and the Czech Republic, the ministries declared that the two tiers had existed before 1999, but around 55% of the HEIs in both countries indicated that they are introducing such programmes only as a result of Bologna.

26 Christian Tauch, Andrejs Rauhvargers, *Survey on Master Degrees and Joint Degrees in Europe*, September 2002, EUA.
27 Conference on Master-level degrees, Helsinki 14 -15 March 2003, *Conclusions and Recommendations*, p.5.
28 It should be mentioned that in the context of Continuing Education/Lifelong Learning there are also professionally oriented Master degrees such as MBA degrees in many countries that carry only 60 ECTB credits.
29 Cf. Memorandum, *Assignment to review certain issues relating to university degrees*, 26 April 2002, and Fact Sheet: *Review of certain issues concerning higher education qualifications,* December 2002, both published by the Swedish Ministry of Education and Science.
30 In assessing the *Trends 2003* figures on this particular aspect, one should bear in mind that the questionnaires were sent to all types of HEIs, including colleges, polytechnics and similar institutions that offer only first-cycle degrees and would therefore reply negatively to the question whether they have already introduced a two-cycle structure.

Obviously, the Bologna discussions have persuaded the institutions in these countries to make use of legal options that seemed less attractive before. Not surprisingly, Bologna has had a particularly strong impact in countries where governments defined a deadline for the compulsory introduction of the new system. Half of the HEIs in The Netherlands, 62% in Norway and 74% in Italy have changed their degree structures as a result of Bologna.

In those countries where the reform decision has been taken only recently or not yet at all, or where the introduction is still voluntary, high percentages of HEIs so far declare only their intention to shift to the new structures: 52% in Germany, 53% in Austria, 59% in Hungary, 67% in Slovenia, 72% in Portugal, and 82% in Spain. There is little opposition in principle to the two-tier structure, with the exceptions of Greece and Lithuania, where 25% and 19% of HEIs respectively declared that they had no intention of introducing such a system.

The students' perception of the present state of introducing two tiers largely confirms the HEIs view: almost two thirds of the students' associations indicated that their institutions either have two tiers or are introducing them.

Figure 9 - Percentage of HEIs with two-tier degree structures, according to the HEIs

Percentage of HEIs with a two-tier system

🟩	over 75%	(16)
🟩	50 to 75%	(8)
🟧	25 to 50%	(12)
🟥	less than 25%	(3)
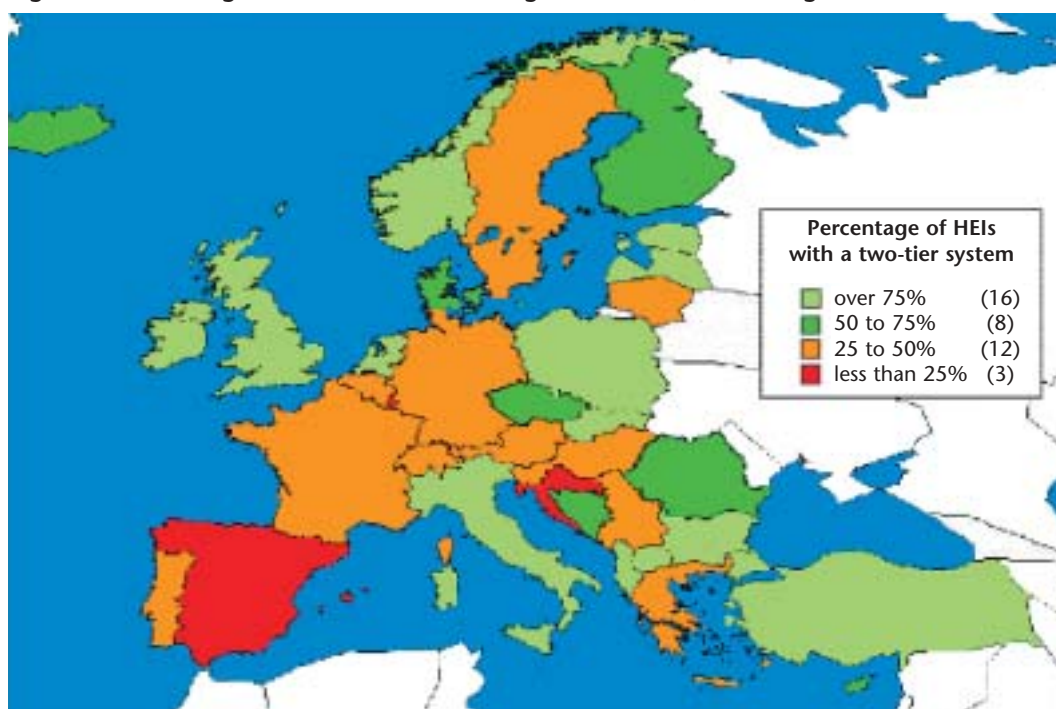
Source: Trends 2003

From two to three tiers: including doctoral studies in the Bologna Process

Although the Bologna Declaration explicitly mentioned doctorate degrees, the discussion on post-graduate degrees has so far focused largely on Master degrees. On the other hand, the need for more structured doctoral studies in Europe has been highlighted repeatedly in the past years. Thus the Directors for Higher Education and the Presidents of Rectors' Conferences of the EU countries, at their annual meeting in Cordoba in 2002, adopted recommendations that stressed the relevance of doctoral studies to the Bologna Process.[31] They also stated somewhat optimistically that the Bologna Process had already contributed to a large extent to eliminating the divergences in the provision of doctoral studies around Europe with regard to structure, content, formal aspects and orientation. Participants called for the setting-up of structured doctoral studies, including provisions for quality assessment, and for making employability a criterion also in the design of doctoral studies. They stressed the need for joint European programmes at doctoral level, for mobility support to doctoral students

31 Meeting of Directors General of Higher Education and Presidents of Rectors' Conferences of the EU/EEA, Cordoba, 7-9 April 2002, see http://www.bologna-berlin2003.de.

and for the creation of a **European doctorate label**. The recommendations concluded by pointing to the central role of doctoral studies and the training of young researchers in the creation of a European Higher Education Area and, more generally, of a European Knowledge Area. In that context one should mention EURODOC, an association of doctoral students and young researchers from various European countries.[32] EURODOC was founded in Spain in 2002 and aims at providing a discussion platform to doctoral students and representing their interests at institutional, national and European levels. It would seem advisable to involve EURODOC in further discussions on how to develop postgraduate and in particular doctoral studies in the European Higher Education Area.

It is becoming more and more acknowledged that the European tradition which still exists in many disciplines (i.e. leaving doctoral students largely to their own devices and providing them only with more or less intensive individual tutoring and supervision) is for many reasons not suited any more to the needs of modern societies. More to the point, it hampers the realisation of the European Higher Education Area (and, one might add, of the European Research Area). Doctoral programmes, where they exist, and in particular Joint Degree programmes at doctoral level, can be among the most attractive features of the EHEA. But for the time being, interested students are still confronted with a confusing variety of national and institutional structures that are anything but "easily readable and comparable". While HEIs in some countries have begun to set up doctoral studies, including graduate schools, others still consider the traditional model of strictly individual tutoring to be sufficient.

The results of this survey suggest that Europe is today divided exactly into halves with regard to the two basic types of organising the doctoral phase: 18 ministries replied that in their countries most doctoral students received only individual tutoring and supervision, while 17 ministries indicated that taught courses were normally offered in addition to tutoring.

The data received in response to the questionnaires must however be interpreted carefully, as the questions did not differentiate between HEIs with and without the right to award doctoral degrees. The more traditional style of providing doctoral students only with supervision seems to prevail in Greece where 40% of HEIs answered yes to this question, while 20% indicated that taught courses were offered in addition to supervision and 40% found the question not applicable to their situation. Also in Slovakia (44%), Bulgaria (62%), Ireland and Romania (80%) and in SEE the supervision only-model seems to be dominant. In the following countries, on the other hand, a large proportion of HEIs offer taught courses for doctoral students: France (41%), the Czech Republic (48%), Finland, Norway and Poland (55%), Italy (63%), Sweden (73%) and Spain (89%).

A further indicator of whether doctoral studies are offered in a rather structured way or on a largely individual basis is the question of whether credit systems are already being applied to the doctoral phase or not. Around 20% of the ministries declared that ECTS is applied at the doctoral level in their HEIs, slightly less than 20% said that a different credit system was used. Almost half answered that credit systems were not yet applied at this level and more than 15% replied that their HEIs had no intention of doing so.

One example for the application of ECTS to doctoral studies is the new Austrian University Act: it specifies that a doctoral degree requires a minimum of 120 ECTS credits, whereas 240 ECTS credits or more lead to a PhD.

As for the HEIs themselves, the highest positive replies to the idea of using credits for doctoral studies came from Finland (44%), Sweden (53%), Estonia and Spain (71%). The clearest resistance came from Switzerland (where 36% declared they did not intend to take such a step), the UK (39%) and Ireland (40%).

Curricular renovation, employability and e-learning

Since the differentiation between undergraduate and graduate levels of higher education is new to many continental European countries, it is clear that a real reform cannot stop at cutting the tradi-

32 http://www.eurodoc.net

tional one-tier programmes into two slightly longer and slightly shorter halves, leaving the curricula otherwise unchanged. The Bologna Declaration hinted at this problem by underlining that undergraduate degrees should be relevant to the labour market. Subsequently, much concern from teaching staff, trade unions and students has focused on the term "employability", which seemed to many to imply a surrender of higher education systems to the short-term requests of an unpredictable labour market. Even in replying to this survey, more than 40% of the student associations supported the view that "too much importance is attached to the 'production' of employable graduates, at the expense of the traditional advantages of academic education." Around 20% saw Bachelor/Masters mainly as an attempt by governments to save money by shortening study durations and some 17% fear that mobility might be hampered by the new degrees.

Generally speaking, however, the discussion today has taken a more constructive and less polemical turn than a few years ago: most of the former critics have understood that employability is not about producing graduates to the orders of the employers, but about the responsibility of higher education institutions toward their graduates and about the whole new range of possibilities that the Bachelor-level degree, if properly introduced, can open to students (and, indeed, to the labour market).

The positive judgements by student associations regarding the introduction of the two tiers far outweigh the critical remarks: around 50% indicated that Bachelor/Master will allow for more individual learning paths and facilitate mobility, and 12.5% even explicitly welcomed the increased employability provided by the new degrees.

This discussion has become part of a much wider process that can truly be called a change of paradigm in education, and which is not limited to higher education. This change can be seen as part and parcel of a new emphasis on lifelong learning, of a changing student population, of new modes of delivery of study programmes, and involves a shift from input to output definitions, from a teacher-centred to a student-centred approach, from formal definitions (length of programmes etc.) to definitions of competences.

Several initiatives which have been taken since the Prague meeting highlight these trends. A recent study by Stephen Adam gives a comprehensive overview of the present situation.[33] Adam observes that "many European countries have recently adopted the two-cycle qualification structure based on the Bachelor and Master distinction, but have done so with little Europe-wide agreement or common understanding to resolve what exactly distinguishes the two. Some hurried reforms have led to simplistic solutions where old qualifications have been crudely repackaged without due regard to levels and standards".[34] Projects like the Joint Quality Initiative or "Tuning Educational Structures in Europe" intend to remedy this problematic situation, by discussing descriptors and trying to define outcome levels and qualifications for different levels and disciplines.

Many higher education institutions are involved in these projects, but the majority are struggling on their own with curricular reform – or are they?

According to the ministries, in almost half (16) of the countries, a majority of HEIs have started curricular reform as a result of Bologna, and in nine others a minority have started to do so. As for the HEIs themselves, almost 28% report that they are undertaking curricular reform in all departments and 25% are doing it in some departments. In some countries, the real figures are far above this average: in The Netherlands 42% of HEIs have started the reform in all departments, in Switzerland 43%, in Bulgaria 54%, in Latvia 55%, in Estonia 57%, in Norway 66% and in Italy 74%. On the other hand, 40% or more of HEIs in Belgium, France, Finland, Greece have not started curricular reform yet, in Turkey this figure amounts to 53%, in Portugal to 63%, in SEE countries to 75% and in Spain to 82%. Obviously, these figures also reflect the state of political decision-making in the respective countries: in Portugal and Spain, for instance, the HEIs are still awaiting detailed guidelines for the implementation of the two-tier structure.

33 Stephen Adam, *Qualification structures in European Higher Education,* Study prepared for the Danish Bologna Seminar, Copenhagen, 27-28 March 2003.
34 op.cit, p.i.

Seven ministries indicated that curricular reform will start soon in their countries. Only two ministries, four rectors' conferences and some 11% of the HEIs report that they feel no need for such a reform. Interestingly, 77% of British institutions see no need for reform, while in Ireland only 20% take this attitude and almost 47% say they will start curricular reform in the near future. The latter group includes the Institutes of Technology which are currently reforming their degree structures.

Generally speaking, universities are slightly more advanced than other HEIs in implementing curricular reforms.

It is difficult at this stage to assess the thrust and scope of the reforms taking place. One indicator can be the concern with employability. It turns out that this issue provides a remarkable case where HEIs themselves are committed even more strongly to reform than ministries or rectors' conferences.

13 out of 36 ministries declared employability to be a very important criterion in curricular reform, 19 saw it as important and only four as not very important. For the rectors' conferences the figures are: 10 (out of 36) very important, 17 important and 8 not very important.

As for the HEIs, they are taking the issue much more seriously: almost 56% see it as very important and 36% as important. A differentiation according to types of HEI shows that it is even more important to the "other" HEIs than to the universities: 45% of universities, but 63% of other HEIs replied very important. Employability is of particular importance to business/economics (very important: 72%) and to technology/engineering (58%). Only 5% of HEIs attach little relevance to employability.

The students' views confirm the weight attached to the issue by a vast majority of HEIs: almost 60% of the students indicated that in their institutions, "employability" was a very important criterion in curricular reform, 17% saw it as important and only 21% as not very important.

In the context of curricular renewal, it is worth mentioning that so far e-learning appears to play a rather minor role in European HEIs. There is little evidence of any targeted attempts to pool resources and make use of e-learning developments to complement traditional modes of course delivery and to target additional learners beyond the bounds of the normal student population. While a number of e-learning initiatives are developing all over Europe, especially in the context of distance and lifelong learning, their deliberate development as complements to regular teaching seems so far to be in an embryonic phase. The potential benefits of innovating learning methods, targeting additional user groups or reaching a wider audience do not seem to be recognised or valued strongly enough to justify the respective investments in the eyes of governments or higher education institutions.

In light of the potential for saving development costs, for pooling not just resources but also user groups, such abstinence is rather surprising since opportunities would seem to be particularly worthwhile in a European context, where networking between institutions has become a strong tradition. The relatively low level of activity on this front is presumably due to the high level of initial investment needed to provide the necessary infrastructure and updating of technological and methodological expertise on the part of many of the academics concerned, both of which are necessary conditions for any market success in this area. In times of tightening budgets and cuts even in the most traditional and fundamental HE provision, such investments are deemed impossible at most public European institutions.

Limited involvement of professional associations and employers in curricular reform

Since employability matters in curricular reform, it would appear logical to involve professional associations and employers in designing and restructuring the curricula, but the feedback from

HEIs seems somewhat slow in this regard: in three countries only, more than 50% of institutions indicated a close involvement of this kind: Ireland (60%), the UK (61%) and Lithuania (87.5%). Also France is doing rather well, with 43% reporting a close and almost 40% an occasional involvement of employers. At the other end of the scale, institutions in Germany (22%), Norway and Sweden (20%), and Greece, Portugal, Spain, Poland, Romania, Turkey and SEE countries (with 15% or less) indicate close employer involvement. In Belgium, Spain, Turkey and Greece, around 50% of HEIs report that professional organisations and employers are only rarely involved in curricular development. At institutional level, universities are less likely than other HEIs to involve employers: 37% of other HEIs, but only 23% of universities declare a close involvement, whereas 31% of universities, but only 22% of other HEIs involve these groups rarely.

The Bachelor: a valid degree in its own right or only a stepping stone?

The Bachelor enjoys full acceptance as a terminal degree in the British Isles. In Ireland 33% and in the UK 50% of HEI leaders expect students to leave their institutions with a first degree.

The general picture across the whole of Europe, however, looks different: only few institutions (17%) expect their graduates to leave with a Bachelor-level degree. This would suggest a certain lack of confidence in the "relevance to the labour market" that these degrees actually should possess. Universities particularly appear to harbour doubts about the terminal status of first degrees: only 9% of universities, but 22% of other HEIs can imagine their graduates leaving with "only" a Bachelor.

There are, however, vast differences between countries. In Germany only 10% of HEIs expect holders of a Bachelor degree to leave the system, in Austria only 9%, Italy 7%, Spain and Switzerland 7%, Portugal 6% and France 4%. In some countries like Estonia, Poland or Greece, not a single institution replied positively to this question. This may reflect the novelty of, and lack of familiarity with the new degrees, which expresses itself foremost in the function attributed to first degrees: as a stepping stone or an orientation platform. It may also reflect the insufficient design and content of some of the new Bachelor programmes – they may not include the skills and competences students will need to become employable. This in turn can be explained by the non-involvement of employers in designing the curricula – a vicious circle that can be broken only by more communication between HEIs and the world of work.

In the following countries, close to half of the HEIs or more have a balanced stand on the matter ("some will leave and some continue at Master level"): Ireland, UK, Greece, Sweden, Portugal, Slovenia, Romania and Turkey. In France, Switzerland, Finland, Poland and Slovakia, between 60% and 77% of HEIs think that students will stay for a Master programme.

Passing from the Bachelor to the Master level

The Helsinki Conference of March 2003 on Master degrees stated the following: "The entry to a Master programme usually requires a completed Bachelor degree at a recognised higher education institution. Bachelor and Master degrees should have different defined outcomes and should be awarded at different levels (…) All Bachelor degrees should open access to Master studies…".[35]

The responsibility for defining entry requirements for Master programmes varies across Europe. Almost 30% of HEIs indicated that this has been taken care of within an overall institutional policy, while 26.4% allow departments to define their own programme conditions. Almost one fifth of HEIs have not tackled the problem yet.

Countries favouring a more "centralised" approach include Switzerland, Norway, Ireland, the UK, Italy, Bulgaria, Poland and Turkey, whereas in Germany, the Czech Republic and SEE countries a majority of HEIs leave the decision to the departments.

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35 Conference on Master-level degrees, Helsinki 14 -15 March 2003, *Conclusions and Recommendations*, p.4.

In Portugal and Spain, HEIs are expecting clear political decisions on structural reforms and 50% or more have therefore not yet discussed the matter of access to Master programmes.

Beyond structures: the need for descriptors, level indicators and qualification frameworks

While the introduction of two tier structures has made significant or considerable progress in most Bologna countries, "there is a danger that the creation of Bachelor-Master awards will mask significant differences in their level, regard and practical application. It is possible that a hollow framework may emerge that hides and confuses, rather than illuminates. This would set back the Bologna Process."[36]

Higher education reforms have always been a national, regional or institutional matter, rather than a European or an international issue, and the Bologna Process is not an attempt to change this reality. A set of objectives has been agreed upon in Bologna and Prague, but as countries have begun to implement these, it is becoming increasingly important to ensure that the process does not result in more instead of less confusion. Before Bologna, everyone knew that national higher education systems were indeed as different and incompatible as they looked. Bologna must avoid the risk of producing seemingly converging and compatible structures that could turn out to be, in spite of a common terminology, just as irreconcilable as the old ones.

To avoid this, the Copenhagen Seminar on qualification structures proposed a number of steps: "The ministers meeting in Berlin in September 2003 should encourage (the elaboration of) national qualifications frameworks for their respective higher education systems…"

They should also "launch work on an overarching qualifications framework for the European Higher Education Area, with a view to providing a framework against which national frameworks could articulate."

"At each appropriate level, qualifications frameworks should seek to describe the qualifications making up the framework in terms of workload, level, quality, learning outcomes and profile."

"Within the overall rules of the qualifications frameworks, individual institutions should have considerable freedom in the design of their programmes. National qualifications frameworks, as well as an EHEA framework, should be designed so as to assist higher education institutions in their curriculum development".[37]

Examples of qualifications frameworks based on external reference points – qualification descriptors, level descriptors, skills and learning outcomes – exist or are in the process of elaboration in England and Wales, Scotland, Ireland and Denmark. They do not in any way prescribe core curricula for specific disciplines, but contain quite general descriptors, thus leaving ample room for a diversity of curricular designs.

Governments and higher education institutions should make the elaboration of qualifications frameworks one of the priorities of the next phase of the Bologna Process. National frameworks will have to be in tune with "an acceptable, non-intrusive, overarching European qualifications framework to accommodate the huge diversity of European educational awards".[38]

5.1.2 Key findings

- 80% of the Bologna countries either have the legal possibility to offer two-tier structures or are introducing them at present. Many governments have fixed deadlines for the transition from the previous (traditional) to the new degree system. In the remaining countries, the necessary legislative changes are being prepared. The latter holds true also for SEE countries.

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36 Stephen Adam, *Qualification structures in European Higher Education*, Study prepared for the Danish Bologna Seminar, Copenhagen, 27-28 March 2003, p.i.
37 Recommendations of the Danish Bologna Seminar, Copenhagen, 27-28 March 2003, p.1-2.
38 Stephen Adams, op.cit, p.i.

- 53% of HEIs have introduced or are introducing the two-tier structure, 36% are planning it. About 55% of HEIs in SEE have not yet introduced the two-tier structure.
- Only 11% of HEIs see no need for curricular reform as part of the Bologna Process.
- In half of the countries, doctoral students receive mainly individual supervision and tutoring while in the others taught doctoral courses are offered additionally.
- 56% of HEIs see "employability" as a very important criterion in curricular reform, and a further 36% see it as important.
- The regular and close involvement of professional associations and employers in curricular development still seems to be rather limited.
- Student support for the new degrees clearly outweighs their reservations, but the risk of putting too much emphasis on "employability" still causes unease among a substantial number of them.
- In countries where first degrees at Bachelor level have not existed in the past, there still appears to be a tendency to see them rather as a stepping stone or orientation platform than as valid terminal degrees.

5.1.3 Future challenges

- Governments and HEIs have to cooperate closely to ensure that the implementation of the new degree structures is not done superficially but is accompanied by the necessary curricular reform, taking into account the ongoing European discussions on descriptors for Bachelor-level and Master-level degrees, learning outcomes and qualification profiles.
- Governments and HEIs should also cooperate, both at national and European levels, in encouraging the setting-up of structured doctoral studies, particularly in interdisciplinary and international settings.
- At many institutions and in many countries, Bachelor-level degrees are still not regarded as valid degrees in their own right but rather as mere stepping stones in a Master-level programme. Ensuring Bachelor degrees are seen as valid and accepted qualifications is a challenge still to be met by academics and employers.
- HEIs should be encouraged to seek a close dialogue with professional associations and employers in reforming their curricula.
- To achieve the objective of a "system of easily readable and comparable degrees" within the European Higher Education Area, it will be essential that governments and HEIs use the next phase of the Bologna Process to elaborate qualifications frameworks based on external reference points (qualification descriptors, level descriptors, skills and learning outcomes) in tune with a common European Qualifications Framework.

5.2 JOINT CURRICULA AND JOINT DEGREES

In order to further strengthen the important European dimensions of higher education and graduate employability, Ministers called upon the higher education sector to increase the development of modules, courses and curricula at all levels with "European" content, orientation or organisation. This concerns particularly modules, courses and degree curricula offered in partnership by institutions from different countries and leading to a recognized joint degree. (Prague Communiqué, 2001)

5.2.1 Analysis

That ministers in Bologna and Prague called for more joint curricula and degrees came as a logical step, given that these are relevant to virtually all objectives of the Bologna Process, be it cooperation in quality assurance, recognition of degrees and qualifications, transparency and convergence of European higher education systems, more mobility of staff and students, international employability of graduates, and finally, enhanced attractiveness of European higher education to other parts of the world.

The motivations for offering joint curricula/joint degrees can be manifold. European bodies and national governments may see them as a means to foster European citizenship and employability

among their graduates. National and regional governments may encourage them to strengthen the attractiveness of a region. For the higher education institutions, joint curricula/joint degrees may be a means to upgrade their own programmes, to gain foreign accreditation, to award types of qualifications that their national system does not offer, to strengthen their institutional competitiveness, or to generate extra income (by "franchising" their programmes and degrees).

Some important events related to joint degrees have taken place since Prague, most importantly the publication of a study on the current state of affairs regarding joint degrees in the countries taking part in the Socrates programme.[39] Moreover, Sweden and Italy have taken the initiative of organising seminars and conferences on joint degrees and integrated curricula, leading to detailed recommendations.[40]

Taking stock: Joint Curricula and Joint Degrees around Europe

Rauhvargers' study raised a number of important issues. While in most Bologna countries, HEIs appear to have at least to some extent established joint curricula and even joint degrees with foreign partner institutions, this often seems to take place solely at the individual initiative of particular institutions. Ministries were therefore often not in a position to provide reliable data on the state of affairs and, worse, legislation in many countries does not refer to joint degrees or even excludes them.

Not surprisingly, bilateral cooperation is more common than multilateral, even within networks that are designed for multilateral cooperation.

Joint curricula, developed by two or more higher education institutions in different countries, would be the first step toward joint degrees and do not normally present legal problems. The situation becomes more difficult in many countries as regards joint degrees, as the study showed: awarding joint degrees and their recognition at national level still poses legal problems in a majority of countries. The Steering Committee for Higher Education and Research of the Council of Europe therefore discussed this issue in October 2002 and adopted a set of recommendations. In these, the Lisbon Recognition Convention Committee is encouraged to consider adopting a subsidiary text to the Convention on the Recognition of Joint Degrees, and governments are asked to review national legislation to remove obstacles to joint programmes and qualifications.[41]

As for the disciplines, joint degrees exist in every field of study and are most common in economics/business and engineering, followed by law and management. Interestingly, the regulated professions such as architecture, engineering, medicine, were considered by some respondents to be particularly difficult fields for the creation of joint degrees and especially easy by others.

There seems to be quite a lot of cooperation underway at the level of doctoral studies, especially in the form of jointly supervised theses, leading either to one degree (with specific mention of the binational character of the research) or to two separate degrees.

Joint degrees are most common at Master level and exist in more or less all Socrates countries. There are far fewer examples at Bachelor level.

There are several ways in which joint degrees are awarded. Issuing one single degree in the name of both (or all) participating institutions appears to be legally possible for the time being only in the UK and Italy. Awarding two separate degrees ("Double degree") is a more common and relatively longstanding practice. In a majority of countries, however, both possibilities are precluded by law and the only possibility is to issue one single certificate by one institution that in one way or another explains the specific learning itinerary of the graduate.

39 Christian Tauch, Andrejs Rauhvargers, *Survey on Master Degrees and Joint Degrees in Europe*, September 2002, EUA.
40 *Seminar on Joint Degrees*, Stockholm, 31 May 2002, *Seminar on Integrated Programmes*, Mantova, 11-12 April 2003 – for the conclusions of both seminars, see http://www.bologna-berlin2003.de, "Bologna seminars".
41 Council of Europe Steering Committee for Higher Education and Research, Meeting Report, Strasbourg 3-4 October 2002, p.12, http://www.coe.int.

In the absence of specific regulations for joint degrees, all the national requirements for "normal" degrees apply, regarding e.g. the national approval of programmes, specific names and classifications for programmes, regulations for quality assurance, specific requirements for the precise text on certificates and the language of instruction, etc. Some higher education laws do not allow students to be enrolled at more than one institution, or they require that students spend 50% of their study time or more at a national institution and that they defend their final thesis at a national institution. Thus the Icelandic ministry reports that the present legal situation in their country would not allow joint degrees, as only one single institution can be responsible for a degree. However, specific events organised to discuss the matter of joint degrees, such as the Austrian-Slovak workshop on Double Degrees in Bratislava in May 2003, show that the issue is receiving increasing attention.

The EUA Joint Masters pilot project

The European University Association is currently running, with financial support from the European Commission, the *Joint Masters pilot project*. Eleven existing Joint Masters programmes have been selected, involving 73 European universities, to try to identify what factors make such programmes successful and attractive, and to find solutions to common problems. Final results will be presented at the Berlin Conference in September 2003 but a discussion document of April 2003 already lists a number of interesting observations.[42] It shows the participating networks as pioneers, "being a step ahead of current Bologna reforms in their multiple national contexts" and therefore confronted with numerous obstacles. These may pertain to financial constraints (often as a result of non-recognition of the programme at national level), different recruitment and admission procedures, different Bachelor/Master structures, diverse fee levels, matters of quality assurance and accreditation, the use of ECTS and the Diploma Supplement etc. The list of obstacles shows the central position of joint degrees in the Bologna Process since virtually all the various Bologna objectives and action lines are involved. It is all the more reassuring, though, that both academics and students agree that the Joint Master programmes are worth their while and that the benefits clearly outweigh the disadvantages.

Proposed definition for joint degrees

On the basis of Rauhvargers' study and the recommendations of the two seminars held in Stockholm (May 2002) and Mantova (April 2003), and in the absence of an officially agreed European definition, it is at least possible to establish a working definition for joint degrees. They should have all or at least some of the following characteristics:

• The programmes are developed or approved jointly by several institutions.
• Students from each participating institutions study parts of the programme at other institutions.
• The students' stays at the participating institutions are of comparable length.
• Periods of study and exams passed at the partner institution(s) are recognised fully and automatically.
• Teaching staff of each participating institution should also teach at the other institutions, set up the curriculum jointly and form joint commissions for admission and examinations.
• After completion of the full programme, the student should either obtain the national degrees of each participating institution or a degree awarded jointly by them. [43]

What do ministries, HEIs and students really think of these?

Given the call for more joint degrees in the Prague Communiqué and the subsequent events and discussion, the findings of the *Trends 2003 report* are at least partly disappointing:

It looks as if in many countries, neither governments nor institutions have discovered the real potential of joint curricula/joint degrees, while in some countries they are deliberately used to push certain goals.

42 EUA Joint Master pilot project, Inter-Network Thematic Meeting, Discussion Working Document, April 2003.
43 Cf. Andrejs Rauhvargers, *High Expectations – Joint Degrees as a Means to a European Higher Education.* In: NAFSA International Educator, Washington, Spring 2003, pp.26-31, 48 .

Only around 20 percent of ministries indicated that they consider the topic very important, namely Italy, Liechtenstein, Portugal, Romania, Sweden, Turkey and the UK. To the majority of ministries and rectors' conferences, joint curricula and degrees are only of medium importance.

The matter of joint curricula/joint degrees is, like employability, one of the few examples where HEIs are more "Bologna-minded" than their ministries. Almost one third of the HEIs attach high importance to both joint curricula and joint degrees. Business and economics institutions are the strongest supporters: around 50% of them find both joint curricula and joint degrees very important.

42% of all HEIs think that joint curricula are of medium importance, with 37% for joint degrees. To one quarter of HEIs, joint curricula are rather unimportant and 28% even attribute low importance to joint degrees. Institutional support for joint degrees is particularly high in SEE countries (45%), France (55%), Romania (60%) and Italy (63%), and especially low in Estonia, Finland and Switzerland (around 14%), Norway and Sweden (around 6%) and the UK (4.5%).

Student support for both joint curricula and joint degrees resembles that of the HEIs: almost one third of their associations thinks they are very important. More than 40% attaches medium importance and one quarter sees them as rather unimportant.

Legal situation and financial incentives

More than half of national legislations (19, according to the ministries) appear not to allow joint degrees at present, most of them (15), however, will be amended accordingly. One third of the ministries reported that their legislation allowed it already, and in five countries legislation has been changed recently. These answers probably refer to the possibility of awarding the more traditional "Double Degrees" or a common certificate with an explanation of the students' specific learning itinerary. However, genuine joint degrees in the sense of "supranational" awards remain an unknown concept in most countries. The Lisbon Recognition Convention does not yet cover these either as it is based on the mutual recognition of national degrees. An amendment of the Lisbon Convention to include genuine joint degrees also is being prepared and it is safe to assume that similar changes in almost all European recognition regulations will be needed.

It would seem that the explicit inclusion of the joint degree issue into higher education laws, combined with financial incentives for the HEIs, is rather the exception. One example for such an approach is the new Austrian University Act of 2002. It makes joint degrees one of the criteria for funding laid down for the so-called performance agreements, and the ministry therefore expects that this will be an incentive for HEIs to address this topic.

More than half of the ministries declared that they promoted joint curricula/joint degrees by providing grants for student mobility. Unfortunately, no precise data on the dimension of these grant schemes are available. One third of the ministries also declared that they provide financial incentives for staff mobility and one third for programme development. On the other hand, almost 30% give no financial support at all to joint curricula/joint degrees.

European joint degrees: a hallmark for the European Higher Education Area

The focus of interest in European higher education from non-European students is and will probably continue to be directed at the graduate levels of Master and doctoral studies. Developing European joint degrees at these levels, jointly awarded by several European institutions, could become a hallmark of excellence of the European Higher Education Area.

There is already a sound basis for European cooperation in this field. Many hundreds of HEIs have gathered experience for more than ten years in student exchange through Erasmus and other

mobility programmes. Those who worked with ECTS have gained further expertise in assessing curricula from other institutions and defining equivalencies and compatibilities with their own.

One should add that there are today a number of networks at both European and regional levels, e.g. in border regions, where students can change freely from an institution in one country to one in a neighbouring country, within the framework of a joint degree programme. One regional example would be EUCOR, the cooperation between French, German and Swiss universities on the Upper Rhine. A more recent creation is the Øresund University, a network of 12 Danish and Swedish universities. There are also institutions that are de facto or de jure binational institutions, like the European University Viadrina in Frankfurt/Oder on the German-Polish border, the Transnationale Universiteit Limburg (Flemish-Dutch cooperation) or the newly founded Bulgarian-Romanian Interuniversity Europe Centre (BRIE) in Rousse/Giurgiu.

Another form of support for the development of joint curricula and joint degrees is provided by larger institutions like the Franco-German University in Saarbruck - which is not, as its name would suggest, a "real" university but a binational centre which promotes and supports cooperation between HEIs not only in the border region, but everywhere in France and Germany. The FGU is about to open its support programmes to third countries to enlarge their scope of activities.

Lastly, many activities have taken place at the grassroots level. Countless departments all over Europe have gone beyond the rather loose Erasmus-style cooperation and set up networks for joint curricula and joint degrees. These can be thematic networks, networks among institutions or departments with similar profiles (such as the members of the CLUSTER or TIME networks, the Coimbra or Santander Groups or the IDEA League), even self-declared networks of excellence – there is a remarkable variety. Some, like Campus Europae, have the ambitious objective of developing fully integrated curricula leading to genuine European degrees. But generally, one may say that only a few institutions see the full potential of using joint degrees to position themselves strategically in an international student market.

While all this shows that Europe is not starting from scratch in the development of joint degrees, it should be emphasised that these activities have been left largely to the individual initiative of professors, supported by the demands of students for certain study-abroad possibilities.

If political authorities, the rectors' conferences and the HEIs themselves want to capitalise on existing knowledge and experience and to make joint degrees a real asset of the European Higher Education Area, they will have to make a deliberate and systematic attempt to promote joint degrees as a strategic objective. In most countries this requires amendments in the existing higher education legislation, but also the elaboration of agreed guidelines and definitions for joint curricula/joint degrees, both at national and European level.

Finally, the Bologna Process could probably benefit from the development of truly joint European degrees in the sense of supranational degrees. Such degrees would have to fulfil most, if not all of the criteria listed above (see "proposed definition for joint degrees"), and would in particular lead to degrees awarded jointly by all participating institutions. However, this calls for a new approach to degree and recognition regulations both at national and European levels.

A strong incentive to governments and HEIs to advance along that road may come from a new initiative by the European Commission. The Commission has realised the potential of joint degrees at postgraduate level and therefore proposed ERASMUS Mundus, a programme which aims at boosting the attractiveness of Europe as a study destination through European Master programmes, taking into account the experience gathered in the EUA Joint Master pilot project. From 2004 onwards, ERASMUS Mundus will provide support to HEIs for the development of joint degrees and mobility grants for students and teachers/researchers from outside Europe.

5.2.2 Key findings

- Joint curricula and joint degrees are intrinsically linked to all the objectives of the Bologna Process and have the potential to become an important element of a truly European Higher Education Area.
- Nevertheless, and in spite of the appeal in the Prague Communiqué, joint curricula and joint degrees still do not receive sufficient attention, as is confirmed by the fact that most ministries and rectors' conferences attach only medium or even low importance to the matter.
- While support for joint curricula and joint degrees is clearly higher among HEI and students, they have not yet been recognised as a core tool for institutional development and strategic planning, and their creation and coordination still appears to be left entirely to the initiative of individual professors.
- More than half of national legislations do not yet allow for the awarding of joint degrees.
- More than two thirds of the ministries claim to give some kind of financial incentive to the development of joint curricula/joint degrees, but the extent of such support is not known.

5.2.3 Future challenges

- Ministries and HEIs in the EHEA will lose an enormous opportunity to position their HE systems internationally if they do not focus their attention more than before on systematic – including financial - support for the development of joint curricula/joint degrees, also in view of the new *ERASMUS Mundus* programme.
- This will entail amendments to the existing higher education legislation of many countries.
- It will also call for the elaboration of agreed guidelines and definitions for joint curricula/joint degrees, both at national and European level.

5.3 RECOGNITION

"Adoption of a system of easily readable and comparable degrees, also through the implementation of the Diploma Supplement, in order to promote European citizens' employability and the international competitiveness of the European higher education system." (Bologna, 1999)

"Ministers strongly encouraged universities and other higher education institutions to take full advantage of existing national legislation and European tools aimed at facilitating academic and professional recognition of course units, degrees and other awards, so that citizens can effectively use their qualifications, competencies and skills throughout the European Higher Education Area. Ministers called upon existing organisations and networks such as NARIC and ENIC to promote, at institutional, national and European level, simple, efficient and fair recognition reflecting the underlying diversity of qualifications." (Prague Communiqué, 2001)

5.3.1 Analysis

There are two basic types of recognition: academic recognition, e.g. when a student wants to change to another higher education institution, and recognition for professional purposes, when a graduate wants to use his/her qualifications on the labour market. Often, the term "professional recognition" is used to mean *de jure* professional recognition, i.e. recognition for the purpose of access to a regulated profession, such as lawyer, medical doctor or architect. The Bologna Process is concerned with both types.

The Bologna Declaration and the Prague Communiqué clearly indicate the necessary steps toward improved recognition in Europe:

- Awareness of the existing legal tools, mainly the Lisbon Convention, and application of the principles contained therein;
- Cooperation of the national recognition bodies (ENIC/NARIC) with their HEIs and among each other at European level;
- The widespread use of credits and the Diploma Supplement.

The Lisbon Convention

The *Convention on the Recognition of Qualifications concerning Higher Education in the European Region* was adopted in Lisbon in April 1997. It is the most important legal document for recognition in Europe today, containing principles of good practice regarding the recognition of qualifications giving access to higher education, recognition of periods of study and recognition of higher education qualifications, and emphasising the importance of transparent criteria and procedures and the rights of the individual to fair treatment.

At the time of writing, 23 "Bologna" countries (Austria, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, France, Hungary, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxemburg, Norway, Portugal, Romania, Slovakia, Slovenia, Sweden, Switzerland and the UK) had ratified the *Lisbon Convention*. Finland, Malta, the Netherlands and Poland have signed but not yet ratified it. Germany will ratify in the near future. Belgium, Greece, Ireland, Spain and Turkey have not yet signed the Convention.

Figure 10 - Status of Lisbon Convention in Europe, staff awareness and recognition procedures
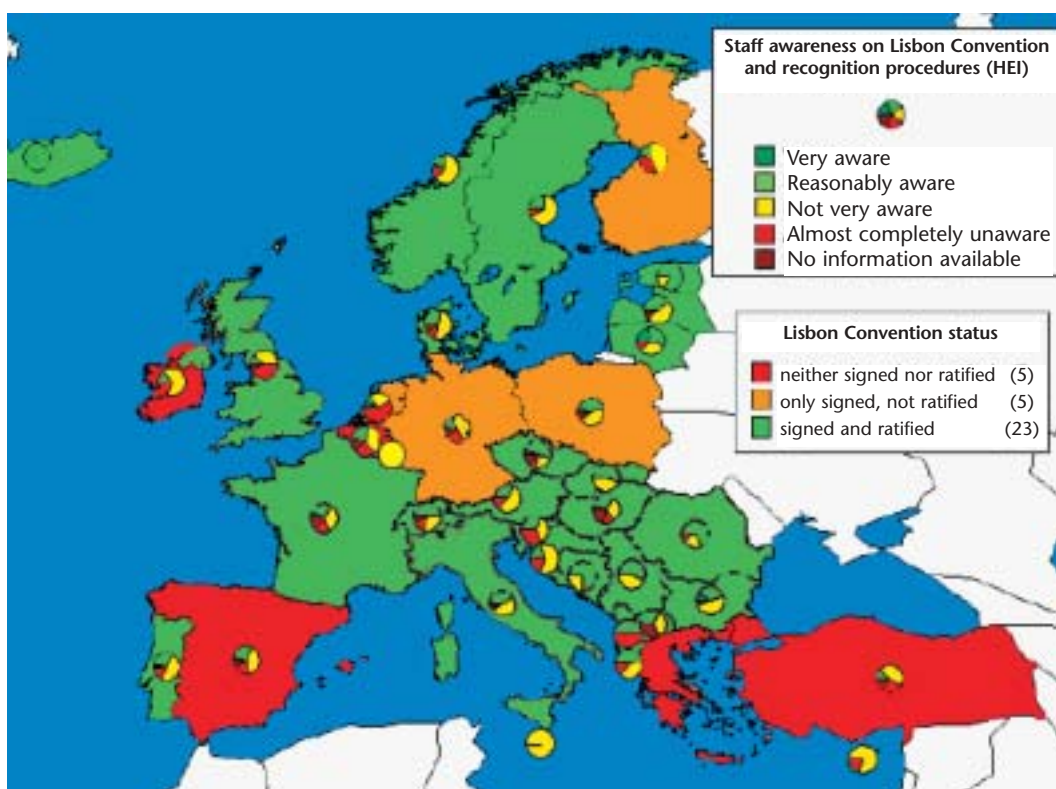
Source: Trends 2003

In a survey carried out among government representatives by the Council of Europe in preparation for the seminar on "Recognition Issues in the Bologna Process" in 2002, 33 of 58 respondents indicated that their recognition legislation had been adapted to the provisions of the Lisbon Convention. However, this information apparently has not yet reached the HEIs.

When asked about the awareness of the provisions of the Lisbon Convention within their countries' HEIs, only 9 ministries and only a single rectors' conference considered it to be very high. 16 ministries and 19 rectors' conferences expected a reasonable awareness, and 10 ministries and 10 rectors' conferences indicated that the HEIs were not very aware. The heads of HEIs themselves are even more sceptical: only 3% think their academic staff are very aware (at universities even less than at other HEIs) and 28% reasonably aware. 42.5% are reported to be not very aware and 17%

almost completely unaware. Most worrying was that 7% (less at universities, more at other HEIs) indicated that they had no information on the Lisbon Convention.

As for the students: only two out of 37 students' associations thought that there was a very high awareness of the Lisbon Convention in their members' HEIs. Around 30% considered the awareness to be reasonable and more than half of them thought that the HEIs were not very aware or almost completely unaware.

Staff in Lithuanian HEIs seem to be by far the most informed: 22% are reported to be very aware of the Lisbon Convention, a clear lead against the closest countries in the table, the Netherlands (8%) and Norway (7%). High percentages of reasonable awareness can be found in Estonia (83%), Romania (67%), Slovakia (56%), the Czech Republic (51%), and Switzerland (50%). As for an almost complete lack of awareness, this appears to be particularly high in The Netherlands (58%) and the UK (45.5%). No information available applied most frequently to institutions in Hungary (23%), the Czech Republic (14%), Belgium and France (almost 13%). (See Figure 10 for country distribution.)

The ENIC and NARIC networks – very active, but...

The main agent for the implementation of the Lisbon Convention and, more generally, for improved recognition within Europe is the ENIC network. For improved recognition within Europe it cooperates closely with the NARIC network. While the European Network of Information Centres (ENIC) was established jointly by the Council of Europe and UNESCO, the National Academic Recognition Information Centres (NARIC) were set up by the European Commission. All the Bologna countries have ENIC/NARIC offices.

The ENIC/NARIC networks have been quite active since the Prague Conference in complementing the provisions of the Lisbon Convention in the light of the Bologna-related developments. In June 2001 the ENIC network prepared a *Recommendation on Criteria and Procedures for the Assessment of Foreign Qualifications* as a supplement to the Lisbon Convention.[44] At the same meeting, it also prepared a *Code of Good Practice in the Provision of Transnational Education.*[45] These reports were later adopted by the Lisbon Recognition Convention Committee.

Moreover, the report *Recognition Issues in the Bologna Process*[46] was prepared and served as the main background document for the Conference in Lisbon in April 2002 under the same title. This conference made it obvious that the understanding of recognition needed to undergo a profound change if the objectives of the Bologna Process were to be achieved: from the formal acknowledgement of a foreign degree to a more substantial and sophisticated assessment of it within the receiving country's education or employment system. The conference emphasised moreover the vital role of information in recognition, and gave recommendations to the various stakeholders on how to improve recognition.[47]

Finally there is ongoing operation between ENIC/NARIC and ENQA about possibilities for linking quality assurance procedures to recognition issues.

...are higher education institutions aware of them?

As the Final Recommendations of the Lisbon Conference in 2002 rightly put it, the problem is not a lack of information on recognition issues, but rather its abundance and how to structure it in a user-friendly way. One of the most important tasks of the ENIC/NARIC is to advise HEIs on good practice in recognition and inform them on developments at the European and international level. As the initiatives mentioned above show, there is constant and close cooperation going on within the ENIC/NARIC network. The question however is: how good is the cooperation of the ENIC/NARIC offices with the HEIs in their respective countries? In the survey carried out in 2002

44 http://www.cepes.ro/hed/recogn/groups/recomm_assess.htm.
45 http://www.cepes.ro/hed/recogn/groups/transnat/code.htm.
46 http://www.cepes.ro/hed/recogn/network/Riga_enic/final_rec.htm.
47 http://www.bologna-berlin2003.de, "Bologna seminars".

for the Lisbon Conference, seven countries indicated that the role of their ENIC/NARIC had been strengthened, e.g. as a coordinating body between national institutions in matters of quality assurance.

70% of the ministries and more than 50% of the rectors' conferences replying to the *Trends 2003* survey think that this cooperation is close. One quarter of the ministries and slightly more rectors' conferences see a limited cooperation and only one ministry and two rectors' conferences think there is no cooperation at all.

The ministerial view is rather optimistic, as a look at the HEI answers to *Trends 2003* shows: only 20% of the HEIs (27.5% of universities, 16% of other HEIs) report a close cooperation with their NARIC/ENIC. 24% regard their cooperation as limited and almost one quarter indicated that there is no cooperation at all. What is even worse: a full 28% frankly admitted that they did not know what ENIC/NARIC was. In SEE countries, 50% of HEIs have no cooperation with ENICs, 25% do not know what ENIC is and about 50% of the academic staff are unaware of the Lisbon Convention. It should be pointed out, however, that this seemingly high level of ignorance among HEIs regarding ENIC/NARIC might be at least partly explained by the fact that the national ENIC/NARIC are often known under a different name to theirs HEIs: e.g. NUFFIC in the Netherlands, ZAB in Germany, AIC in Latvia etc.

Among the students, a quarter signalled close cooperation between their members' HEIs and the ENIC/NARIC, and slightly more than that see limited cooperation. Only around 12% think there is no cooperation at all and some 14% of the student associations wrongly think that there is no ENIC/NARIC in their country, but this may again be due to different denominations.

The highest scores for close cooperation between HEIs and their ENIC/NARIC office come from Estonia (86%), Sweden and Ireland (53%) and Norway (45%). No cooperation was reported most frequently from Italy and Spain (around 40%), Poland and France (around 36%), Lithuania, Romania and Slovenia (33%). The institution ENIC/NARIC was unknown to around 47% of HEIs in Denmark and France, to around 42% in Germany and Switzerland, to 38.5% in Hungary and 37% in Turkey.

Will Bologna facilitate academic recognition?

Given that the Bologna Process is a governmental initiative with the establishment of a system of readable and comparable degrees as its first objective, it may surprise observers that only two thirds of the ministries expect that the Process will greatly facilitate academic recognition. 20% think there will be a slight improvement and for 10% it is difficult to say at this stage. One ministry thinks it will have not much impact and another one even expects Bologna to complicate recognition.

Rectors' conferences were even less optimistic, with less than half expecting much improvement.

On the other hand, almost 55% of the HEIs think that Bologna will greatly facilitate recognition, with engineering schools being the most optimistic (62%). A further 21% of the HEIs expect a slight improvement, and almost the same number think it is too early to tell. Almost no institution expected a negative or zero impact.

The staunchest believers in a clear improvement are to be found among HEIs in Bulgaria, Estonia, Greece, Italy, Lithuania, Portugal, Romania, Spain and SEE countries (all between 70% and 86%). At the other end of the scale come the UK institutions with 27%.

Students share similar views to the HEIs. Around 45% expect Bologna to bring a very clear improvement to recognition, one quarter sees a slight improvement and around 28% think it is difficult to say at this stage. Only one student association fears that it might actually complicate recognition.

Have HEIs established internal recognition procedures and are students aware of it?

More than 70% of the student associations reported that their members experience occasional recognition problems when returning from a study abroad period, and 17% also say this happens often.

To find out about the internal arrangements of HEIs for recognition, the *Trends 2003* questionnaire to the HEIs contained a number of questions regarding institution-wide procedures for different kinds of recognition.

It would seem that a large majority of institutions, around 82% (and 85% in SEE), have such procedures for study abroad recognition: in Austria, Bulgaria, Italy, Norway, Poland and the UK this figure is even higher, between 92 and 97%. On the other hand, in Lithuania only 67% reported they had such procedures, in Denmark only 64% and in Turkey only 47%. Student associations, by the way, did not confirm this information from the institutions: only one quarter said that to their knowledge, HEIs had such procedures.

Recognition of periods of study at another institution in the same country is – surprisingly – less well developed than for periods of study abroad, but 66% of HEIs claim to have mechanisms in place. Estonia, Ireland, Sweden and the UK all reported above 80%, while Portugal with 47% and Greece with 40% scored lowest. Only around 12% of the students think their institutions have such a policy.

As for the recognition procedures for degrees from other institutions in the same country, 65% of all HEIs responded positively to this question. The leading group was Sweden (80%), Estonia (86%), Ireland (87%) and the UK (91%). In Hungary only 51% of HEIs have such procedures, and in Greece only 40%. In the perception of the students, only about 18% of HEIs have such procedures.

The weakest point appears to be the recognition of foreign degrees. Only 58% of HEIs declared they had an institution-wide procedure for this issue, with as many as 83% positive replies in the Netherlands, 86% in Estonia and 93% in the UK, but only 45% in Latvia, 42% in Denmark, 38.5% in Bulgaria, 33% in Romania, 32% in Spain, 20% in Greece and 13% in Lithuania. Unexpectedly, this is the recognition issue seen most positively by the students: almost a third think their institutions have such procedures.

5.5% of all HEIs declared they had no recognition procedures whatever, with the highest percentages coming from Greece (10%), Denmark and Lithuania (13%) and Switzerland (14%).

As for the students, more than a third thought their institutions had no institution-wide recognition policy but were taking decisions on a case-by-case basis, and almost one quarter of the students had no information available on the issue.

It is clear that there is room for improvement, in particular in certain countries, but also in the institutions' internal communication with the students, who seem not always to be aware of existing procedures. However, it can be seen as a positive sign that more than 40% of the student associations reported that in their HEIs there existed an appeal procedure to deal with recognition problems. Around 20% said there was no such procedure, and more than 30% declared that there was no information available on the issue – which is obviously not satisfactory.

Complementing ECTS: the Diploma Supplement

The first action line of the Bologna Declaration calls for introduction of the Diploma Supplement (DS) as one key instrument for the creation of **a system of easily readable and comparable degrees**.

The DS is designed to facilitate both the academic mobility between HEIs and the mobility of job-seekers on the European labour market. In the present situation of transition, with various old and new degree structures existing in parallel, the DS is of particularly high importance.

Employers do not seem to be familiar with the DS yet, which is not surprising as it is only being introduced. A large majority of employers' associations indicated that they occasionally experienced problems with the recognition of foreign degrees but none of the 17 respondents indicated that their members were reasonably familiar, let alone very familiar with the DS. Most were not very familiar and three indicated they had no information available on the DS. Insufficient information presumably also explains why only 5 associations consider it very useful and 4 reasonably useful, whereas 7 had no opinion yet.

Employers' associations have apparently not yet felt an urgent need for assisting their members in the assessment of foreign degrees and qualifications: none declared to be often involved in this field, 7 seem to do so occasionally and 10 are not active at all.

Some countries had introduced a Diploma Supplement even before "Bologna", e.g. Belgium and the Czech Republic. Others have made or are making it an important element of their Bologna-inspired legislative reforms, e.g. Austria, Germany, Greece, Latvia, Sweden, Switzerland and Spain, while others are planning to make the DS a legal requirement in the near future. In the survey carried out for the Lisbon Conference, ten respondents referred to specific legal provisions for the introduction of the DS in all HEIs in their countries.

As with ECTS, however, a considerable gap appears to exist between the macro and the micro level, between ministerial decrees and lip service paid to the DS by various officials on the one hand, and the daily reality in the academic departments on the other: disagreement on responsibilities between departments and central administration, software problems and other such issues seem to hamper the speedy implementation of the process.

The European Commission has therefore identified the wide-scale introduction of the Diploma Supplement as the first measure it will support as part of its action plan "From Prague to Berlin".[48] The Commission is considering the introduction of a DS label, as a complement to the ECTS label.

In 2002, the two pools of ECTS Counsellors and Diploma Supplement Promoters, both set up by the EU Commission and coordinated by the EUA, were merged. Governments, quality assurance bodies and HEIs would benefit from being made more aware of the existence of this pool of experts and from a regular and close consultation with them on national and regional levels.

5.3.2 Key findings

- About two thirds of the Bologna signatory countries have so far ratified the most important legal tool for recognition, the Lisbon Convention.
- Since Prague, the ENIC/NARIC networks have taken a number of very useful initiatives to improve academic and professional recognition.
- More than half of the academic staff seem to be not very aware or not aware at all of the provisions of the Lisbon Convention.
- Cooperation with ENIC/NARIC is reported to be close by only 20% of HEIs while 25% do not cooperate at all with their ENIC/NARIC, and 28% do not know what ENIC/NARIC is, at least not under this name.
- Two thirds of the ministries, more than half of the HEIs and slightly less than 50% of the students expect that the Bologna Process will greatly facilitate academic recognition procedures.
- Almost 90% of the student associations reported that their members occasionally or often encounter recognition problems when they return from study abroad.

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48 *From Prague to Berlin*: Progress report of the EU Commission.

- In a number of countries, institution-wide procedures for recognition seem to be quite under-developed.
- Even where such procedures exist, students - as the group primarily concerned - are often unaware of these.
- It is a positive sign that more than 40% of the student associations indicated that there were appeal procedures for recognition problems in place in their members' institutions.
- The Diploma Supplement is being introduced in an increasing number of countries, but employers as the main target group are still insufficiently aware of it.

5.3.3 Future challenges

- All Bologna signatories should ratify the Lisbon Recognition Convention as soon as possible.
- Awareness of its provisions and of the ENIC/NARIC initiatives (recognition in transnational education etc.) among academic staff and students must be raised through cooperation between international organisations, national authorities and HEIs.
- The cooperation between HEIs and their ENIC/NARIC could be greatly improved in many countries. Moreover, the ENIC/NARIC need to be strengthened in some countries.
- In many countries, HEIs should be encouraged to develop more and better institutional recognition procedures, and especially to intensify communication with students on these matters.
- Awareness of the potential benefits of the Diploma Supplement needs to be raised, especially among employers.
- The introduction of a **Diploma Supplement label** (like that of an **ECTS label**) would probably lead to a clear qualitative improvement in the use of the Diploma Supplement.

5.4 CREDIT TRANSFER AND ACCUMULATION

Establishment of a system of credits – such as in the ECTS – as a proper means of promoting the most widespread student mobility. Credits could also be acquired in non-higher education contexts, including lifelong learning, provided they are recognised by receiving universities concerned. (Bologna, 1999)

Ministers emphasized that for greater flexibility in learning and qualification processes the adoption of common cornerstones of qualifications, supported by a credit system such as the ECTS or one that is ECTS-compatible, providing both transferability and accumulation functions, is necessary. (Prague, 2001)

5.4.1 Analysis

For the last 15 years the introduction of ECTS in higher education institutions has been fostered by the EU Socrates-Erasmus programme.

At present some 1200 of the 1820 institutions with a Socrates-Erasmus Institutional Contract have received a Socrates grant for the introduction of ECTS. It would be wrong, however, to conclude from these figures that two thirds of HEIs are applying ECTS today and that the task ahead consists simply in taking care of the remaining third.

The present dilemma of ECTS

Today's situation with regard to ECTS is characterised by two very ambivalent tendencies:

On the one hand it seems that a high degree of acceptance and momentum for this once controversial tool has been reached almost all over Europe. ECTS gained further importance when the Bologna Declaration listed the introduction of credit systems as one of its main objectives. While the Declaration mentioned ECTS only by way of example, it is clear that no other European system is emerging. Instead, ECTS has spread fast all over Europe and has been included in many new higher education laws. The students, as the body most immediately concerned, also take a rather favourable stand on ECTS: most of the answers received from student associations agree on its main advantages, i.e.

- Easier recognition for study abroad periods
- Greater transparency of the actual student workload
- ECTS as a trigger for long-needed reforms and
- Greater flexibility in defining individual learning paths.

It is worth underlining that one quarter of the responding students' associations indicated that ECTS had not yet been introduced in their institutions.

On the other hand, ECTS as a tool is undergoing rapid and far-reaching extensions before it has been properly understood and introduced in its original form in many institutions. While in many places the system is still applied in a very rudimentary or haphazard fashion to student exchange and **credit transfer** only, the European discussion is now focusing on its use also for **credit accumulation**. This development has to be seen in the wider context of a shift from teacher-orientation to student-orientation, from inputs to outputs, from formal study structures to the definition of learning outcomes and qualification profiles, as described briefly in 5.1.1.

Credit transfer: legal provisions and institutional reality

As many countries have amended or changed their higher education laws since the Bologna Declaration, ECTS or ECTS-compatible systems have often become a central element of the national reform. Austria, France, Germany, Italy, Hungary, Slovakia and other countries have linked the introduction of two cycles to the simultaneous, compulsory introduction of ECTS. Other countries, especially in Northern Europe, have a tradition of national credit systems that are largely compatible with ECTS, and in some of these countries the two systems co-exist for the time being. Denmark and Norway, however, have decided to replace their national systems with ECTS. Even in those countries where no obligation to use credits exists, e.g. in Bulgaria, the Czech Republic, Poland or Slovenia, many HEIs now use ECTS for credit transfer.[49]

All in all, almost two thirds of the ministries replied that their HEIs use ECTS for **transfer purposes**. In around 15% of the countries, a different transfer system seems to apply and, in the remaining countries, no system is used yet. These figures are backed by similar answers from the rectors' conferences and the HEIs themselves. Two thirds of HEIs use ECTS for transfer purposes. Among the engineering institutions this percentage is even as high as 83%. More than 20% of HEIs use a different system and almost none declared that they have no intention of introducing a credit transfer system.

In the following countries the use of ECTS for transfer is particularly widespread: Greece and Sweden (80%), Finland and Poland (81.5%), Austria and Belgium (84%), Romania (87%), Norway (90%), Ireland and Denmark (93%). Other systems than ECTS seem to be applied above all in the UK (45.5%) and Turkey (58%). In some countries, relatively large percentages use neither ECTS nor other systems: e.g. in Portugal (34%), Bulgaria (38.5%) and Hungary (44%). In SEE countries about 75% of HEIs have not yet introduced ECTS as a credit transfer system.

Figures 11 and 12 give a quick overview of the ministerial estimate regarding the use of ECTS and the HEIs' own declared use of ECTS for transfer, with an interesting divergence between the two: ECTS appears to have established itself in various countries without the national ministries being aware of it.

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49 For the use of ECTS at doctoral level see also Chapter 5.1.1: "From two to three tiers: including doctoral studies into the Bologna Process".

Figure 11 - Use of ECTS or other credit transfer systems by HEIs, according to the ministries
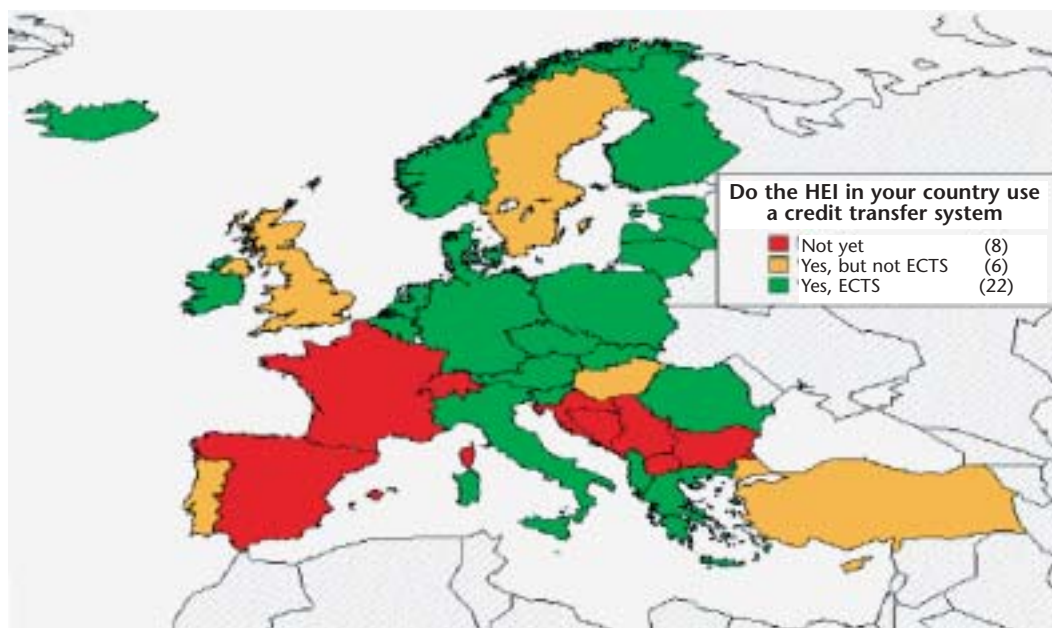
Source: Trends 2003

Figure 12 - Use of ECTS for credit transfer by HEIs, according to the HEIs
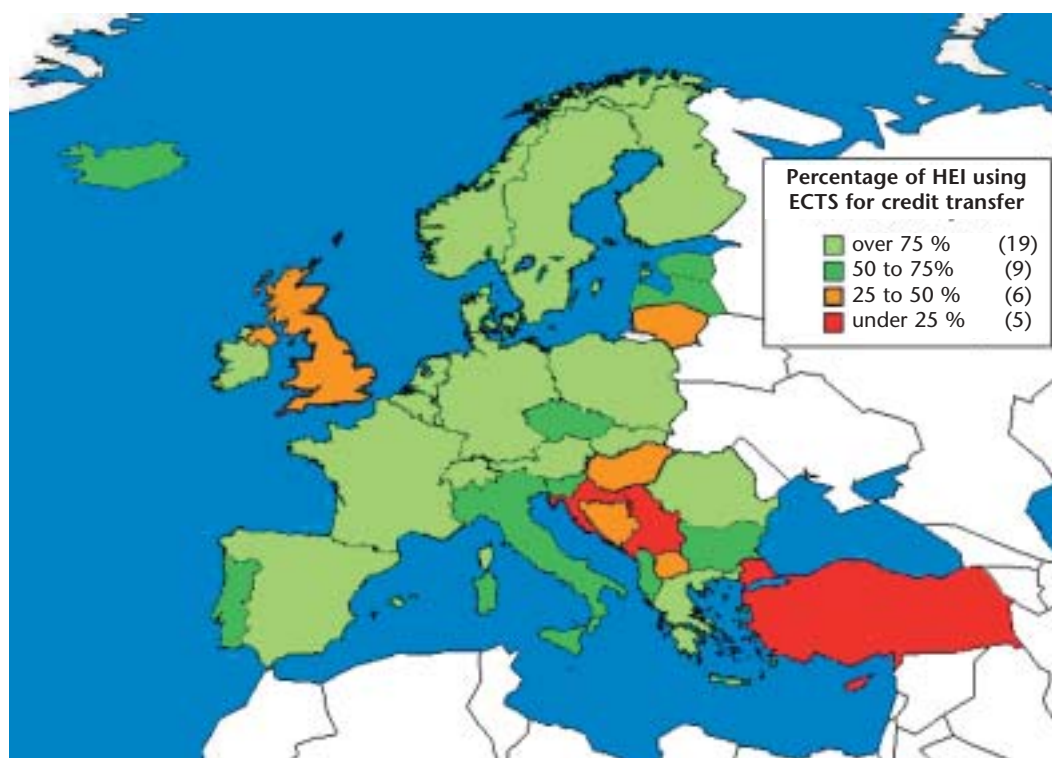
Source: Trends 2003

The new dimension: credit accumulation

The idea of using ECTS as an accumulation system for all students, not just the mobile ones, was already contained in the Bologna Declaration with its reference to the use of credits in the context of lifelong learning, and was confirmed by the Prague Communiqué. Meanwhile, the idea has been discussed by the Tuning Project, the group of ECTS Counsellors and at other fora and con-

ferences, and a clearer picture is emerging. The basic principle is to complement the workload definition by the specification of level, contents and, finally, also learning outcomes of a given unit in relation to a degree programme. This is by no means alien to the original idea of ECTS as a transfer system. The recognition of ECTS credits for periods studied abroad was, from its beginning as a pilot scheme, always supposed to occur on the basis of prior agreements between academic staff about level, content and workload of course units. ECTS requires not just the calculation of the workload of each unit and of an according number of credits but also, and this aspect has often been neglected, a detailed description of the course offer of the institution with information on contents, teaching methodologies, assessment methods of the courses, as well as of support services for international students.

One simple but essential feature of ECTS was clarified and emphasised in the discussion on learning outcomes: credits are not entities in themselves but always describe work completed as part of a curriculum. Hence, in a credit accumulation system, credits are accumulated within a coherent study programme, reflecting a certain amount of work successfully completed at a certain level for a recognised qualification.

One very desirable side effect of using ECTS as a central tool in curricular reform and quality improvement lies in the fact that it often leads departments to the realisation that their curricula are overloaded, making it impossible for the students to finish on time. Moreover, the use of an accumulation system in a modularised study structure allows final degrees to be awarded on the basis of continuous assessments and accumulated credits, rather than traditional final exams that can pose an artificially high risk of failure for students.

Experts agree that ECTS can be used for accumulation purposes without any alterations or adaptations of the basic elements of the system. Indeed, plans to extend it to cover the whole learning experience of a given person are slowly taking shape,[50] following the idea of "credit accumulation for lifelong learning", as supported by ministers both in Bologna and Prague.

Students generally take a favourable view of the accumulation question: almost three quarters of the student associations saw its most important advantage in the fact that it allows *for more flexible learning paths*. Also less overloaded curricula and greater coherence between study programmes within the same institution ranked rather highly among the advantages of credit accumulation in their opinion. Only one fifth of the student associations said the benefits of credit accumulation remained unclear to them.

Credit accumulation: already a reality?

The present reality regarding the use of ECTS (or, for that matter, any other credit systems) for accumulation is even more difficult to assess than for transfer. The *Trends 2003* results come definitely as a surprise:

Almost 40% of ministries across Europe declared that their HEIs already used ECTS for accumulation purposes and another 30% said they used a different accumulation system. The answers from rectors' conferences point in the same direction.

Half of the HEIs declare they use ECTS for accumulation (only 35% in SEE countries), and 22% claim to use another system. One fifth of them even declare they award their degrees exclusively on the basis of accumulated credits, while 47% say they do so on the basis of accumulated credits plus traditional end-of-year exams. (Students' answers largely confirm this point.)

In some countries, the use of ECTS for accumulation seems to be particularly common: in Germany (52%), France (56%), Greece (60%), Austria (66%), Ireland (80%), Switzerland and Norway (around 86%), Romania (93%) and Denmark (96%). Other countries are quite advanced

50 E.g.the TRANSFINE project coordinated by EUCEN is pursuing this objective.

in applying national accumulation systems, e.g. Sweden (60%), the UK (63.6%), Turkey (68.4%), Finland (81.5%) and Estonia (85.7%).

The result that almost three quarters of European HEIs are already using credit accumulation systems seems surprising, especially to the ECTS Counsellors who are familiar with the realities of implementing ECTS and other credit systems. The assumption may be made that these high percentages might at least partly be explained by a widespread non-familiarity with the concept, and might therefore be partly based on a misunderstanding. But the results clearly show the overwhelming acceptance of ECTS as one of the core tools of the EHEA.

Making ECTS work in practice

"As ECTS becomes more widespread, there is growing concern in several countries that inconsistencies in its implementation might inhibit or undermine its potential as a common denominator."[51] This statement of the *Trends II report* in 2001 is even more accurate today. The basic elements and principles of ECTS seem simple enough, but its implementation in the highly differentiated European higher education systems is fraught with all sorts of problems. As ECTS is spreading to an increasing number of countries and institutions, the practical issues encountered are multiplying. Despite many years of promoting the introduction of ECTS, the financial support provided through the Socrates/Erasmus programme and the activities of the ECTS Counsellors Group (set up by the EU Commission and managed by the European University Association), a relatively high level of ignorance and insecurity regarding the basic mechanisms of the system persists.

Ministries seem to judge the situation in a resolutely optimistic way: 80% of them consider their academics to be highly or fairly familiar with credit systems. This view is contradicted by the students who are probably in a better position to formulate an opinion on this matter: only around 15% consider the academic staff in their institutions to be highly familiar and about 35% see them as fairly familiar. Almost 40% of the students think that a large proportion of their academic staff is not yet familiar with ECTS.

The site visit reports by ECTS Counsellors tend to support the students' perception. The same deficits and weaknesses keep reappearing in the reports over the years. One common weakness is the lack of an institutional policy or implementation guideline: in many institutions, ECTS is being introduced at the initiative of one or several departments only, without real support from the university as such. Often ECTS depends entirely on the personal engagement of one or several individuals, and withers away when these people retire or change jobs.

The course catalogue (previously known as the information package), although simple enough in its structure, also poses seemingly eternal problems. Some staff are reportedly unwilling to provide short summaries of their courses or to formulate learning outcomes. Linked to the matter of the course catalogue is one of the most neuralgic issues - the way in which workload is measured and credits are allocated.

Officially, the basic principle of ECTS, that credits have to be allocated not on the basis of contact hours but of working hours, has been accepted everywhere. E.g. Spain, where the contact hours principle applied until now, is also currently changing to the workload criterion.[52]

A study carried out by ESIB[53] on the basis of replies from 27 National Student Unions from 23 different countries revealed that, in many institutions, a rather mechanistic approach is still used in defining workload: either contact hours form the basis, despite decisions to the contrary, or the total amount of credits is simply divided by the number of courses required for a certain degree. A growing number of countries, however, seem to have adopted detailed regulations for ECTS, including nation-wide criteria for defining workloads, e.g. Denmark, Hungary, Lithuania and

51 Guy Haug, Christian Tauch (2001), *Trends in Learning Structures in Higher Education II*, Helsinki, p.34.
52 *La integración del sistema universitario español en el espacio europeo de enseñanza superior*, Documento-Marco, Ministerio de Educación, Cultura y Deporte, p.6, Febrero 2003.
53 ESIB, *Survey on ECTS*, February 2003.

Norway. Of course, a uniform national approach is easier to realise in smaller countries with few institutions than in large countries with numerous and highly diversified institutions. Thus, Dutch students seem to report few problems for the time being, while German students complain about a confusing variety of approaches to ECTS. Many institutions, not only in Germany, still seem to try to adjust ECTS to their needs, selecting some elements and omitting or redefining others, rather than implementing the system in the simple but comprehensive way it was devised. Students rightly attribute this to a persistent lack of information among both staff and students.

One of the simplest criteria to assess ECTS as a transfer system is to ask whether students returning from study abroad encounter recognition problems or not. Three quarters of the ministries report that their students occasionally encounter problems upon their return, only two ministries think this happens often and three believe it never happens. The figures are almost the same for the rectors' conferences. Interestingly, the HEI heads themselves take a much more confident and optimistic view: more than 41% are convinced that their students never encounter problems, and more than half think this may happen occasionally. This is in striking contradiction to the experiences of the student associations: almost one quarter indicated that their members were often faced with recognition problems, and around 47% indicated occasionally. Only about 11% never seem to have any problems and a surprisingly large number, around 17%, of the student associations had no information available on this issue.

Tools and strategies for improving ECTS

The European Commission, one of the driving forces behind the extension of ECTS to credit accumulation and lifelong learning, is aware of the problem, as are the European University Association, the ECTS Counsellors and many national bodies.

An ECTS Conference in Zurich in October 2002, jointly organised by the EUA and the Swiss Confederation, led to a fresh consensus on the purposes of ECTS.[54]

"As a credit transfer system:
- to facilitate transfer of students between European countries, and in particular to enhance the quality of student mobility in Erasmus and thus to facilitate academic recognition;
- to promote key aspects of the European dimension in higher education.

As an accumulation system:
- to support widespread curricular reform in national systems;
- to enable widespread mobility both inside systems (at institutional and national level) and internationally;
- to allow transfer from outside the higher education context, thus facilitating lifelong learning and the recognition of informal and non-formal learning, and promoting greater flexibility in learning and qualification processes;
- to facilitate access to the labour market;
- to enhance the transparency and comparability of European systems, therefore also to promote the attractiveness of European higher education towards the outside world.

As a credit transfer and accumulation system, the key goals of ECTS are:
- to improve transparency and comparability of study programmes and qualifications;
- to facilitate the mutual recognition of qualifications."

The Zurich Conference also reached agreement on the key features and documents of the system, which were further refined by a working group of the EU Commission, EUA and national ECTS Counsellors.[55] The list contains no new elements but recalls in a very concise form the essential principles (number of credits, workload principle, grading etc.) and elements: course catalogue, learning agreement and transcript of records.

54 Credit Transfer and Accumulation – the Challenge for Institutions and Students, EUA/Swiss Confederation Conference, Zurich 11/12 October 2002, *Conclusions and Recommendations for Action.*
55 European Credit Transfer and Accumulation System - *Key features*, February 2003.

The coming years will require an even stronger effort than in the past to ensure the proper and coherent achievement of the following objectives:

- to generalise ECTS as a credit transfer system among the vast majority of institutions participating in Socrates-Erasmus;
- to prepare the ground further for ECTS as a coherent credit accumulation system, involving formal, informal and non-formal learning ("credit accumulation for lifelong learning");
- to attest its proper use through an **ECTS label**, to be introduced from November 2003.

So far, ECTS as a system has shown an impressive flexibility in its application to new contexts and purposes. All concerned, in particular the HEIs themselves and the students, have to continue their work in properly implementing ECTS while at the same time extending its use to new fields. The Copenhagen Seminar of March 2003 on the European Qualifications Framework therefore pointed to the need to make sure that "transparency instruments such as the Diploma Supplement and the ECTS be reviewed to make sure that the information provided is clearly related to the EHEA framework."

5.4.2 Key findings

- ECTS is clearly emerging as the European credit system.
- In many countries it has become a legal requirement, and other countries with national credits systems are ensuring their compatibility with ECTS.
- Two thirds of HEIs today use ECTS for credit transfer, while 15% use a different system.
- As for credit accumulation, almost three quarters of HEIs declare that they have already introduced it – this surprisingly high figure needs further examination.
- While HEIs are rather optimistic with regard to the smoothness of recognition procedures of study abroad periods, students' experiences partly contradict this.
- In many HEIs, the use of ECTS is still not integrated into institution-wide policies or guidelines, and its principles and tools are often insufficiently understood.

5.4.3 Future challenges

- The information campaign of the past years, undertaken by the European Commission, the European University Association and many national organisations, has yet to reach a majority of institutions.
- The basic principles and tools of ECTS, as laid down in the *Key Features* document, have to be conveyed to academic and administrative staff and students alike in order to exploit the potential of ECTS as a transparency tool. To achieve this, ECTS requires institutional guidelines.
- Support and advice is particularly needed regarding credit allocation related to learning outcomes, workload definition, and the use of ECTS for credit accumulation.
- The introduction of the ECTS label will lead to a clear qualitative improvement in the use of ECTS.

6. THE EHEA: INSTITUTIONAL DEVELOPMENT AND POSITIONING

6.1 INSTITUTIONAL AUTONOMY, QUALITY ASSURANCE AND ACCREDITATION: JUGGLING BETWEEN SELF-IMPROVEMENT AND ACCOUNTABILITY

"European higher education institutions, for their part, have accepted the challenge and taken up a main role in constructing the European Area of Higher Education in the wake of the fundamental principles laid down in the Bologna Magna Charta Universitatum of 1988. This is of the highest importance, given that Universities' independence and autonomy ensure that higher education and research systems continuously adapt to changing needs, society's demands and advances in scientific knowledge. […]

We engage on coordinating our policies to reach in the short term the following objectives […]
* *promotion of European cooperation in quality assurance with a view to developing comparable criteria and methodologies."* (Bologna 1999)

"Ministers […] especially appreciated how the work on quality assurance is moving forward. […] Ministers recognised the vital role that quality assurance systems play in ensuring high quality standards and in facilitating the comparability of qualifications throughout Europe. They also encouraged closer cooperation between recognition and quality assurance networks. They emphasised the necessity of close European cooperation and mutual trust in and acceptance of national quality assurance systems. Furthermore, they encouraged universities and other higher education institutions to disseminate examples of best practice and to design scenarios for mutual acceptance of evaluation and accreditation/certification mechanisms. Ministers called upon the universities and other higher education institutions, national agencies and the ENQA, in cooperation with corresponding bodies from countries that are not members of ENQA, to collaborate in establishing a common framework of reference and to disseminate best practice." (Prague 2001)

6.1.1 Analysis

6.1.1.1 From autonomy via accountability to quality improvement?

Of all the Bologna action lines, quality assurance has attracted the longest sentences and the most prominent declarations of intent on the part of governmental and institutional actors. Quality concerns have also been at the heart of most Bologna reform packages, whenever ministries and institutions have tried to define coherent frameworks for Bologna reforms. Such concerns have pertained to the quality of teaching and learning, of programmes, of institutional management and governance structures. Equally evoked has been the quality of the dialogue with external stakeholders as well as the links between teaching, research and innovation and the transfer of these into economic competitiveness. We should state in this context that **the data gathered in this study also confirm the primacy of the concern with quality as a motor of the Bologna reforms**: together with the preparation of graduates for a European labour market, it is the improvement of academic quality which is seen as the most important driving force of the Bologna Process, not just at the institutional level but also at the level of governments and rectors' conferences (see section 3.2). Moreover, within institutions, it is now becoming more and more obvious that Bologna reforms which are not part of the quest for enhanced academic quality have little chance of gaining sustained support from the academics who are supposed to give concrete meaning to the proposed changes.[56]

At the same time, the concern for quality, which seems to be a shared ground of action on the Bologna stage, is also the scene of underground and explicit struggles to redefine the respective roles which public authorities, universities and society should play in defining higher education in the future. Under the heading of "increased autonomy", such debates have been the prelude to several major reforms of national higher education systems, in which an increase in university autonomy is accompanied by a multiplication of different procedures of accountability and external quality control.[57] The Bologna Declaration clearly includes itself in this widespread public

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56 Such are the findings of the Thematic Network focusing on "Implementing Bologna" in the framework of the EUA's Quality Culture Project.
57 A very useful and stimulating discussion of the relation of university autonomy, collective decision-making and quality assurance, based on a comparison of 8 different national contexts of recent university reforms, has been put forward by Ulrike Felt in her study *University Autonomy in Europe: a background study* (2003) loc. cit., pp.13-104.

rhetoric, when it associates the need for university autonomy with the need to adapt to changing social demands.

What is the link between autonomy, accountability and quality assurance? To start with, we may point to a useful broad definition of autonomy (by Stichweh, 1994) as the ability to

- make independent decisions on the limits of institutional commitment in certain topics and areas;
- decide on the criteria of access to the institutions, both at the level of academics and students;
- define strategic tasks and set institutional aims;
- determine the links to other fields in society which are seen as crucial for further development (e.g. politics, economics etc.);
- assume responsibility for the decisions taken and their possible effects on society.[58]

Thus granting autonomy to a scientific institution will be accompanied by systems of accountability toward society. This explains why the marked shift away from concrete *ex ante* state intervention and regulation which many governments have been and are currently orchestrating, seems often to be accompanied by a mix of extended intervention by other stakeholders (in less regulated forms) as well as by tightened control mechanisms via quality monitoring and outcome-based funding. A comparison of recent national higher education reforms, all of which point to institutional autonomy and quality improvement as the cornerstone of the reforms, reveals that a welcome increase of institutional autonomy vis-à-vis the State does not equal complete freedom and pure self-regulation. Accountability with respect to the public function of higher education is simply taking on new forms. Thus it may now assert itself by way of increased intervention from a variety of different stakeholders, such as external members of newly established governing boards with extensive decision-making powers, partners or sponsors in privately-funded research projects, contractors of professional development programmes which the HEI design upon request, to name but a few examples. Furthermore, no State in Europe which is letting go of its *ex ante* interference in the core processes of higher education (e.g. by having the final say on new programmes or recruitment of new professors), seems to regard current institutional capacity for qualitative self-regulation as being sufficiently developed for it also to let go of its *ex post* control. One of the primary reasons for this distrust may be the high drop-out rates in HE. On average, 30% of students in OECD countries drop out before they complete their first degrees. In individual countries and individual programmes, such rates are sometimes considerably higher. While such drop-out rates do not necessarily mean failure on the part of the individuals (and in many cases may even be induced by the success of such students in other working contexts), it still poses a major problem to institutions and HE funding agencies.

In order to increase institutional autonomy while retaining monitoring control, a majority of States have decided to shift their focus from control of the inputs to that of monitoring previously agreed outputs. This is reflected in more than half of the Bologna signatory countries, reporting in the context of our survey, that their HEI funding is allocated on the basis of quality or output indicators in teaching and/or research. As Felt comments, "in some countries more or less detailed contracts are devised [e.g. in Finland, France, some *Länder* in Germany, soon also in Denmark, *author's note*] and in some cases formulae are developed on the basis of which funds are allocated [e.g. in the UK, Netherlands, Finland, Sweden, some *Länder* in Germany, *author's note*]."[59] Last but not least, quality evaluation mechanisms become a central ingredient of such "management by results" (Felt).

The newly gained "autonomy", while being generally welcomed as a pre-condition for responsive and responsible institutional development, can become highly problematic for HE institutions when the notion of autonomy is used in a technical sense "as a juridical, operational tool necessary for running the university and formally recognised by the State through clearly defined legal provisions" (Felt), as is sometimes the case in current policy debates in Europe. Accountability can thus become reduced "to a technical exercise, evaluated through the use of a clear and rigid set

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58 Stichweh, R. (1994) *Wissenschaft, Universität, Profession – Soziologische Analysen*, Frankfurt: Suhrkamp. Quoted in Felt, U. (2003) "University Autonomy in Europe: a background study" in *Managing University Autonomy. Collective Decision Making and Human Resources Policy*. Proceedings of the Seminar of the Magna Charta Observatory, 17 September 2002, Bologna: Bononia Univ. Press, pp.28-29.
59 Felt, op.cit., p.70.

of indicators," rather than a process of negotiation between universities and the representatives of society.[60] If accountability and evaluation are reduced to a primarily technical exercise by way of rigid output measurements or overly standardised evaluation exercises, then the essential debate about the values and assets which HEIs are best suited to develop for society is clearly at risk. Institutional leaders across Europe have been and are repeatedly pointing to this danger in national debates on HE reforms (e.g. in Finland, Germany, Hungary, The Netherlands, Spain, Switzerland, and the UK).

The current challenge for state and university representatives consists in establishing meaningful quality assurance procedures, which reveal the successes and shortcomings of higher education institutions with respect to their public function and responsiveness to society, without falling short of the universities' institutional uniqueness in seeking a creative and critical distance from society. If quality evaluation and accountability procedures do not leave enough room for higher education institutions continuously to redefine and renegotiate their roles in their local, national, European and international contexts, with new challenges and a changing system of actors and conditions into which they insert themselves, they will undermine the responsiveness of the institutions to these contexts, and, even more disastrously, their capacity to help in innovating within these contexts. Existing quality control and improvement mechanisms in European higher education are currently in the process of trying to strike a fragile balance: how to evaluate enough to raise the institutions' own awareness of the challenges and thus help improvement, while at the same time avoiding too much or too rigid evaluation, thereby hindering institutional profiling and stifling innovative potential.

In the end, the most decisive question for state and university representatives in this decade of rapidly expanding QA procedures, will be how to apply quality evaluation to the universities' unique time frame: if universities are to be defined by their capacity to think ahead for society, not just to solve problems but to identify emerging ones, how can quality evaluation and accountability procedures do justice to the free and unforeseeable movements of science and critical reflection needed to perform this function? How can one prevent evaluation procedures from being too backward-looking, too concerned with compliance rather than with innovation? If a consensus is indeed emerging that evaluation in a European Area of Higher Education will need some common criteria, how can such criteria be found and applied without mainstreaming HEIs into merely compliant institutions? This is the challenge that lies ahead for quality assurance, for 2010 and beyond.

6.1.1.2   External quality assurance structures and procedures

Since the late 1990s, quality evaluation in European higher education has been expanding continuously. In the wake of the EU-funded Quality Assurance Pilot Projects and the subsequent 1998 European Council of Ministers' Recommendation on European Cooperation in Quality Assurance in Higher Education, which suggested that EU Member States establish quality assurance systems, many new quality assurance or accreditation agencies have been established.[61]

According to the data gathered in this survey (see Table 1), only 6 of the 33 Bologna signatory countries do not have an agency responsible for quality assurance and/or accreditation, namely, Austria (which is about to establish such an agency for the universities), the French Community of Belgium, Croatia, Greece, Iceland and Italy. For one country (Luxemburg) no data could be obtained.[62] We should add that in the case of the six countries where the rectors' conferences or ministries reported that no national QA agency exists, the recent comparative review of external QA procedures in Europe, conducted by ENQA, contradicts three of these statements (which are thus marked * in Table 1), showing that external quality control is indeed undertaken by national agencies in these countries: this is the case in the French Community of Belgium where the *Conseil des Recteurs* is responsible for programme evaluation, and in Italy where the *Comitato*

60 Felt, op. cit., p.30.
61 Holm, T., Sorup, R. , Biering-Sørensen, M., and Thune, C. (2003), *Quality Procedures in European Higher Education*, ENQA Occasional Papers, Section 2.
62 Luxemburg is the only Bologna signatory country for which no national level data could be obtained since neither the RC nor the ministry questionnaire was answered.

Table 1 - External quality assurance in Europe

Questions asked in the Trends 2003 survey:

Do you have a quality assurance agency (=QAA) in your country, with regard to teaching, research, overall institutional mission, other activities? Yes or No.

What do you see as the most important feature of the existing external quality assurance and/or accreditation procedures in your country? Public Accountability (=PA), Enhancing institutional quality culture (=QC), Improving Higher Education across the country (IHE), no imp. feature, not applicable (=NA)

Are there any quality criteria/ indicators used in the allocation of public funds in your country? For teaching and research (=T&R), for research only (=R), for teaching only (=T), not yet but this is planned (=Not Yet), no.

COUNTRY	QAA FOR TEACHING	QAA FOR RESEARCH	QAA FOR INSTITU-TIONAL MISSION	QAA FOR OTHER ACTIVITIES	No QAA	MOST IMPORTANT FEATURE OF EXTERNAL QA	QUALITY CRITERIA/ INDICATORS USED IN ALLOCATION OF PUBLIC FUNDS
Austria (RC Universities)*	No	No	No	No	Yes	QC	T&R
Austria (RC Pedagogical Acad.)	No	No	No	No	Yes	QC	No
Belgium (Fr)	Yes	Yes	Yes	No	Yes	IHE	No
Belgium (Fl)	Yes	Yes	No	No	No	QC	R
Bulgaria	Yes	Yes	Yes	No	No	PA	Not yet
Croatia	Yes	Yes	Yes	Yes	No	QC	Not yet
Cyprus (Ministry)	No	No	No	Yes	No	QC	No
Czech Republic	Yes	Yes	Yes	No	No	QC	T&R
Denmark	Yes	No	Yes	No	No	PA/QC	R
Estonia	Yes	Yes	Yes	No	No	IHE	T&R
Finland	Yes	Yes	Yes	Yes	No	QC	T&R
France (RC Grandes Ecoles)	Yes	Yes	Yes	No	No	QC	R
France (RC Directors IUFM)	No	No	No	Yes	No	NA	T&R
France (RC Universities)	Yes	Yes	Yes	No	No	IHE	R
Germany	Yes	Yes	No	No	No	PA	T&R
Greece	No	No	No	No	Yes	IHE/QC	T
Hungary	Yes	Yes	Yes	No	No	IHE/QC	Not yet
Iceland*	No	No	No	No	Yes	IHE	T&R
Ireland (RC Inst. of Technnology)	Yes	Yes	Yes	Yes	No	IHE	T&R
Ireland (RC Universities)	Yes	Yes	Yes	No	No	NA	No
Italy*	No	No	No	No	Yes	QC	T&R
Latvia (Ministry)	Yes	No	Yes	No	No	PA	No
Liechtenstein (Ministry)	No	No	Yes	No	No	QC	Not yet
Lithuania	Yes	Yes	Yes	Yes	No	IHE	R
Malta	Yes	Yes	Yes	Yes	No	QC	No
Netherlands	Yes	Yes	No	No	No	PA	T&R
Norway	Yes	No	Yes	No	No	QC	T
Poland	Yes	Yes	Yes	Yes	No	PA	R
Portugal	Yes	Yes	Yes	No	No	PA	R
Slovak Republic	Yes	Yes	Yes	No	No	IHE	T&R
Slovenia	Yes	Yes	Yes	Yes	No	IHE	T&R
Spain	Yes	Yes	Yes	Yes	No	IHE/QC	T&R
Sweden	Yes	Yes	Yes	No	No	PA	No
Switzerland (RC Universities)	Yes	Yes	Yes	No	No	PA	Not yet
Switzerland (RC FH/HES)	No	No	No	No	Yes	QC	Not yet
Turkey (Ministry)	Yes	Yes	Yes	No	No	QC	No
UK (RC Universities)	Yes	Yes	Yes	Yes	No	QC	T&R
UK (SCOP)	Yes	Yes	No	No	No	PA	R

Source: Trends 2003

Nazionale per la Valutazione del Sistema Universitario conducts programme and institutional evaluation as well as institutional audits and accreditation.[63] It may be assumed that the term "national agency" was interpreted more narrowly by the respective ministries and rectors' conferences. This is also reported by the Austrian ministry, where national agencies are already in existence for the private and non-university sector, but are only about to be established for the university sector, thus resulting in the ministry and rectors' conference having answered "No" to the respective question.

Some countries have recently established or are in the process of establishing new agencies. In Austria the Universities Act 2002, effective in 2003, calls for the establishment of a quality assurance agency for all universities. The *Österreichischer Akkreditierungsrat* has already been conducting accreditation of programmes as well as of institutions in the private and *Fachhochschul* (other higher education institutions) sectors. As for Greece, which has no QA agency yet, one should report that the law concerning the establishment of the national system for quality assurance and evaluation in higher education was introduced before the Greek Parliament during the first months of 2003 and is likely to be implemented soon. The Greek system is limited to quality evaluation and will not contain any kind of accreditation mechanisms. The ministries of Portugal, Iceland and Belgium (Fl) also mention plans to establish independent national accreditation agencies (the Belgian (Fl) one will be established in cooperation with The Netherlands). In Iceland, the ministry of education already has a division of evaluation and supervision which carries out programme evaluation.

One may also note that all Bologna signatory countries and non-signatory countries of SEE have established or are about to establish agencies which are responsible for external quality control in some form or another.

Our own data reveal that **80% of HEIs in Europe currently undergo external quality assurance procedures** (quality evaluation or accreditation). There is no notable difference between universities and other HEIs in this respect. Institutions specialising in business and economics and those specialised in technology and engineering are affected even more often (85% and 89% respectively). In fact, even in those countries where QA agencies have only recently been or are about to be established, more than 50% of the institutions (45% in SEE) mention the existence of external quality assurance procedures. Only in Greece and among the non-university HEIs of Spain, a majority of institutions report that no external QA procedures exist.

The ENQA study confirms that the **primary function of external quality assurance**, at least according to the responsible agencies, **consists in quality improvement**, which is of course the traditional role such procedures were designed to perform. Of course, the procedures themselves need reviewing in order to make sure that they do contribute to institutional quality improvement and to the development of an appropriate quality culture. Transparency of performance and use of funds for the sake of public accountability is often mentioned as an important function, but not as the most important one. The distribution of functions according to the different types of evaluation can be seen in the following overview taken again from the ENQA study:

Table 2 - Objectives of external evaluation[64]

What are the of objectives of the evaluations?	Accountability	Quality improvement	Transparency comparability	National comparability	International comparability	Ranking
Evaluation	71%	93%	74%	55%	26%	3%
Accreditation	86%	91%	76%	71%	62%	5%
Audit	67%	83%	50%	33%	33%	0%
Benchmarking	100%	100%	100%	100%	100%	0%
Other	100%	100%	50%	50%	50%	0%
N=61	46	56	45	36	25	2

Source: data gathered in the framework of the ENQA survey 2002-2003, see footnote below.

63 Holm et al. (2003) op.cit., Appendix A.
64 Holm et al. (2003) op. cit., section 3.3.

The relative balance between accountability and improvement are also confirmed by the recently published study on Quality Assurance by Campbell and Rozsnyai.[65] Indeed, the authors even observe a trend in the accreditation agencies of CEE countries toward improvement orientation, pointing to the various forms of warning, giving institutions or programmes time to improve, and relying more on internal quality control at higher education institutions.[66] Campbell and Rozsnyai generally attribute the increasing focus on improvement to the increasing maturity of a given QA system: "It might be appropriate in certain circumstances, for instance, if addressing the rapid growth of unregulated private education or the introduction of new types of institutions or qualifications, to put an emphasis on accountability and compliance. However, as institutions develop more effective and sophisticated internal quality assurance mechanisms, pressure will grow to move the balance from compliance to improvement."[67]

The findings of the above-mentioned comparative studies are confirmed by our data. Generally speaking, **external quality procedures are evaluated positively** by the HEIs, i.e. most often seen as serving their own purposes. Only 1,5% of HEIs cannot detect any important feature in such procedures, with the notable exception of Austrian universities, where 25% of the heads of institutions cannot see any important feature. Most frequently, the external QA procedures are regarded as enhancing institutional quality culture (40%). 27% of HEIs find that they serve to improve HE across the country. 21% see public accountability as their most important feature. With the exception of France, Slovakia and the UK (as well as the non-university HEIs of Italy and the Czech Republic), in each country a majority of heads of universities and other HEIs regard the enhancement of institutional quality culture (rather than public accountability) as the most important feature of external QA procedures.[68]

One should note that in some countries with long-standing QA systems, there has been media coverage of some of the **unwanted effects of exhaustive quality control** and accountability procedures. The most widely noted and heated debate has occurred in the UK, where quality review and accountability procedures were criticised as being disproportionate and even counter-productive by many HE representatives. An independent study of the costs incurred by the national review system was eventually commissioned.[69] The study indeed revealed disproportionate costs which the public purse had to pay, even though very few cases of abuse were ever uncovered. The costs resulted not only from the heavy procedures, demanding extensive data and document production on the part of higher education institutions, but also from the fact that the various authorities had not coordinated their procedures so that data and documents had to be produced from scratch for the different reviews. Once the costs and burdens of the review system were uncovered, the latter was put on hold. New procedures have been introduced under the heading "academic review".

Apart from the costs, the other important criticism concerned the **mainstreaming effect** which a linear link between output assessment and funding allocation produced. This was the case in the so-called Research Assessment Exercise which treated institutions with very different profiles, aims and conditions according to the same pre-defined performance criteria and rewarded or punished them accordingly. Moreover, since the overall sum for re-distribution was limited and the capacity of HEIs to adapt to the performance rules proved to be greater than expected, many institutions which increased their overall performance still had to face reduced budgets as a consequence.

Of course, the above-mentioned problems should not distract from the many positive experiences of evaluation procedures in the UK, the manifold effects of enhanced performance and the many good practices which such a long-standing system of QA has to offer, particularly with respect to programme evaluation, teaching, counselling and student support services. (We may also recall the positive comments of the student representatives regarding quality evaluation in their country,

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65 Campbell, C. and Rozsnyai, C. (2002), *Quality Assurance and the Development of Course Programmes.* Bucharest: UNESCO/CEPES Papers on Higher Education, Annex 1.
66 Campbell and Rozsnyai, op.cit., p.62.
67 Campbell and Rozsnyai, op.cit., p.26.
68 For 10% the question is not applicable or no answer can be given.
69 PA Consulting Group (2000), *Better Accountability for Higher Education. Summary of a review for the HEFCE.* London. http://www.hefce.ac.uk/pubs/hefce/2000/00_36.htm.

in this context.) Our more extensive description of the problems noted in the UK context is only meant to point out that, as Europe's most radical example of linking performance output and quality assessment to funding, and as a system with a long-standing experience of different approaches to quality assurance, the UK QA system offers a wide array of models of good practice as well as less successful practices, all of which deserve close scrutiny before similar alleys are pursued elsewhere.

In most other European countries, the burden of external quality control does not yet seem to affect institutions heavily enough to be noted by their leaders. (A relevant European survey of academics who are directly concerned by the production of the data and documents for QA as well as by the consequences of any reviews, has not been conducted to this date.) The positive judgement of institutional leaders revealed in our study does not only apply to quality evaluation in the traditional sense but also to accreditation procedures which seem to have been experienced positively by most institutions: 66% of respondents said they found the programme accreditation process which their institution had undergone helpful, while only 8% did not and 26% had not undergone such programme accreditation. However, considering the expansion of external programme evaluation and accreditation, one may expect such procedures to be perceived as more burdensome in the future, as more HE representatives spend more time in review exercises, either as objects or as subjects of evaluation. This assumption would be corroborated by the noted quality and accreditation fatigue in some of the countries with a longer experience of external QA systems, as is reported by HE and QA representatives from Scandinavian countries and the UK, for example.

What is the focus of such external quality assurance? According to the ministries and rectors' conferences, 23 of the 26 national agencies evaluate teaching, 19 evaluate research performance, while 20 agencies evaluate institutional performance in relation to the mission (see Table 1). Interestingly, there is no country which has an agency evaluating research without also evaluating teaching. Similarly, all but 2 of the countries with agencies evaluating institutional mission also evaluate teaching. In 14 countries, QA agencies evaluate teaching, research and overall institutional performance (though not necessarily the same agency).

Neither our data nor the ENQA study reveals the links between evaluation procedures focusing on teaching and those focusing on research or other activities. While we know that institutional evaluation and audits sometimes address these issues, we should point out that they are not the most frequently used evaluation methods (see Figure 14 below). For the universities, however, **the value of the evaluation procedures probably depends to a large extent on their readiness to consider the links between teaching and research, as well as between these core functions and other dimensions of institutional management**. As complex systems, they cannot react to a problem seen in one domain without also affecting another domain indirectly. Similarly, the solution of problems seen within the framework of quality reviews may be undermined by other external mechanisms such as funding formulae. To look at the quality of teaching or research, without considering institutional and national conditions, may well prove to be ineffective: the transparency created remains partial and thus distorting, and paths towards quality improvement remain obscure. Quality improvement in one domain may even foster quality impairment in another. Hence HE representatives frequently report that the focus on an increase in research performance undermines the quality of teaching and counselling and vice versa. Furthermore, insights gained into institutional management which do not address successes and shortcomings in the core competences of a university, teaching and research, are also likely to remain superficial. Institutional audits in Sweden, for instance, were criticised for not reaching the core activities of the institutions at departmental level.[70]

Thus, it may not come as a surprise that QA agencies are increasingly complementing established focuses with new ones: to institutional evaluation audits they add programme focuses (e.g. in France or Sweden), to programme evaluation they add some institutional dimension

70 Franke, S. (2002) "From Audit to Assessment: A National Perspective on an International Issue", *Quality in Higher Education,* Vol.8, No1.

(Netherlands). This trend toward an **increasing mix of evaluation methods within the agencies** has also been observed by the authors of the recent ENQA study. They note that this is clearly a change from 1998, the year of the last status report on QA in Europe, when agencies were still "sticking to the evaluation type (combination of method and focus) that they had traditionally used."[71] Campbell's and Rozsnyai's CEPES study confirms the trend of a softening opposition between institutional and programme focuses, and an increasing mix of the two. The combination of programme evaluation with institutional audit which is gaining popularity is particularly noteworthy, of course, since institutional evaluation and programme evaluation were still opposite parties in older debates on the best QA methodologies. Today, the French CNE (*Comité National d'Evaluation*), known for its institutional approach to evaluation, is also conducting programme and subject evaluations.[72] Another example of a mixed strategy with a changed focus is pursued by the UK's QAA. Here the focus has shifted away from an in-depth programme evaluation to utilising information from internal evaluation processes while stressing institutional audit. The concluded round of programme reviews was criticised for the disproportionate administrative burden it imposed on institutions, when less than 1% of provision had been judged to be failing. While institutional evaluations are often criticised for not reaching the core of the universities' performance, programme evaluations, if pursued exhaustively, are reproached for the administrative burden they create. Considering the softening positions on both ends, one may hope that agencies and institutions will learn from each other regarding the right balance to strike.

According to the ENQA study, the **focus, scope and methods used by these agencies still vary widely** across countries. The consensus on the basic methodological ingredients of quality assurance is now firmly established. In addition to the independence of the agency conducting the quality reviews, they consist in self-evaluation undertaken by the representatives of the unit which is to be evaluated, external review by peers and other stakeholders with an on-site visit (or visits), and a final report which is made public. The studies of ENQA and the UNESCO-CEPES both point to a number of additional elements which are becoming general practice in many agencies, namely

- statistical data from national or institutional sources,
- qualitative information from the institution's internal quality assurance processes,
- performance indicators,
- user surveys of employers, graduates, students, as well as
- other external examiner reports, which are often gathered and made available to the evaluating peers.[73]

A noteworthy development in this respect is the greater involvement of stakeholders, especially students, in the external evaluation processes. Particularly in Sweden and the UK, student participation and input into external evaluation processes has been experienced very positively. ESIB, the National Unions of Students in Europe, also cooperates closely with the ENQA network. As Campbell points out, "this involvement is more than 'representational'. Recent revisions of external evaluation have put the interests of students at their core."Examples of "new" issues raised in reviews are the quality of information provided to students, the learning support facilities, the discrepancies between academic standards and achievements in practice.[74]

The following useful overview is given regarding the frequency of use of the various methods among the 34 European quality assurance agencies (from 23 countries) which participated in the ENQA survey:

As one can see from Figure 13, **programme evaluation is used most frequently** (by 53% of the agencies), while institutional evaluation is used regularly by only 22%. Half of the 34 agencies surveyed mention programme accreditation as one of their functions.

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71 Holm et al. (2003) op.cit., section 4.5. The status report referred to was published by the European Commission (1998), *Evaluation of European Higher Education: A Status Report*. Prepared for DG EAC (then DG XXII) by the Danish Center for Quality Assurance and Evaluation of Higher Education, in cooperation with the French *Comité National d'Evaluation*, Paris.
72 Report of Gilles Bertrand, President of the *Comité National d'Evaluation* of France at the Kassel Symposion "Universities: Fit for the Future?", 18-19 October 2002.
73 Campbell and Rozsnyai, op.cit., p.48; Holm et al., op.cit., section 5.
74 Campbell and Rozsnyai, op.cit., p.56.

Figure 13 - Frequency of the types of evaluation [75]
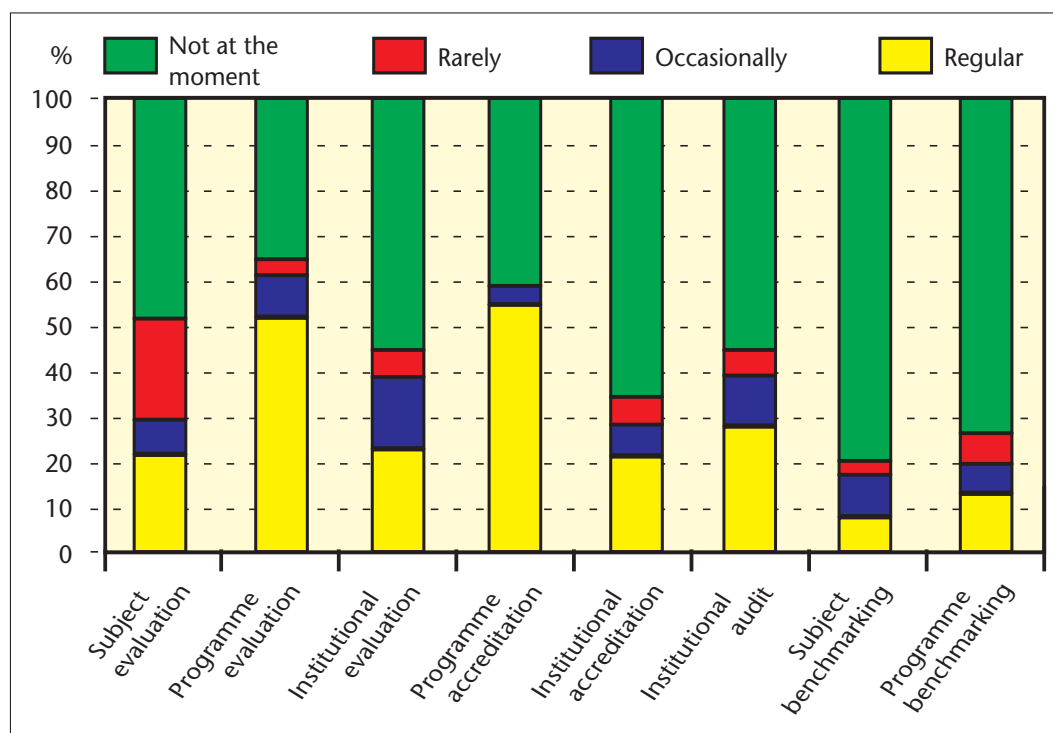
Apart from the focus on programmes, subjects or institutions, the most widely debated issue across Europe is the relation between and respective advantages of quality evaluation vs. accreditation, although the two are seen to be complementary by many representatives.

Accreditation is yet another term which is commonly used but associated with different procedures in different countries. Generally, it differs from other evaluation procedures in that judgements are provided according to pre-defined standards which function as a threshold to decide whether a given subject, programme, institution or theme meets the level defined as necessary to obtain the accreditation label. Having passed this threshold of standards, an accreditation label is awarded. Often these standards are set as minimum standards, though increasingly standards of good practice or excellence, which have already been in practice in individual private accreditation schemes such as the EQUIS scheme for Management and Business Schools, are also being considered.

Accreditation is a widely used method in accession countries, but a number of EU countries (France, Germany, The Netherlands, Finland and Norway) are also in the process of introducing accreditation in their QA systems. The reasons why CEE countries preferred accreditation in higher education in the early 1990s have been analysed by various authors. The need to establish comparability with western HE and thus to use threshold standards, the urgency to re-evaluate programme content and approach, and to introduce more flexible programme structures for a rapidly increasing number of students, are perhaps the most frequently cited reasons.[76]

Of particular interest for the current European discussion may be those countries which already have a tradition of quality evaluation but decide to add accreditation procedures to this. According to public statements by QA agencies and HE representatives, the main added value of such accreditation in these countries is reported to consist in the application of benchmarks and the attribution of a quality label, the label being seen as a currency which can be used in the wider world, which is also the reason for accreditation being popular in most accession countries.[77] Thus accreditation is associated with the hope of increased international recognition. Peer

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75 Holm et al. (2003) op.cit., section 4. Only methods used by more than two agencies are taken into account.
76 Cf. Kristoffersen, D., Sursock, A. and Westerhijden, D. (1998), *Quality Assurance in Higher Education. Manual of Quality Assurance: Procedures and Practices*, European Training Foundation.
77 Cf. comments on the Dutch introduction of an accreditation agency by T. Vroeijenstijn at the Kassel Symposion "Universities: Fit for the Future?" 18-19 October 2002. For trends in CEE accreditation, cf. Campbell and Rozsnyai, op.cit., p.62.

pressure, i.e. pressure to follow suit in an arena where accreditation is spreading in Europe, also seems to play a role. Some QA systems also welcome the association of accreditation with clearer consequences such as funding decisions (mentioned by QA representatives of Norway, The Netherlands and Germany). The ENQA study reveals that, when compared with quality evaluation and audit procedures, accreditation procedures generally seem to be geared more toward accountability, transparency and national as well as international comparability.[78] One should note, however, that accreditation procedures are more and more interlaced with quality evaluation elements, geared toward institutional improvement, as Campbell and Rosznyai point out. Thus a Polish HE representative's comments apply to accreditation procedures in many accession countries: "Accreditation committees are not merely stating whether the various curricula meet the minimum requirements, but they also look at the degree to which these requirements are exceeded and compare this 'excess' against the achievement of set goals (fitness of purpose). In this sense, the work of the accreditation committees has got more to do with the kind of quality assessment carried out in many western European countries, with accreditation being merely a form of utilising the results of the assessment."[79]

In this context, we should note that our data reveal a **widespread support for accreditation among HEIs,** which may come as a surprise to some participants in the recent debates on the need for accreditation in Europe. Only 4% of the HEIs see no need for accreditation. 65% of the 74% of HEIs which had undergone programme accreditation found the process helpful. All in all, 81% of HEIs intend to encourage programme accreditation in the future. Most student associations also find academic accreditation of institutions important when choosing their study programmes. The issue of the potentially considerable investments of time and money into programme accreditation, both by state administration and by HE institutions, is often brought up in discussions on accreditation among state, QA agency and HE representatives but does not seem to have negatively predisposed the majority of institutional leaders yet.

6.1.1.3 Internal quality assurance

As far as institutional realities are concerned, the first question we should raise is, of course, what effect external quality assurance has on internal quality awareness and self-improvement. An international comparative study which has focused on institutional assessment and change suggests that managing quality can bring either benefits or threats depending on how it is undertaken, in what context and for what purpose. The authors argue that quality management is as much about power, values and justification of change as it is about quality, and that is why it is frequently a source of tension and conflict.[80] Generally, more research is needed on the effects of existing external QA on actual quality improvement in different European HE systems, comparing different national and institutional conditions and their effects on the "learning capacity" of the institution. The most relevant project in this respect is the ongoing EU-supported "Quality Culture" project of the EUA, which organised 6 networks of institutions from all over Europe. Each network focuses on a different theme (research management, teaching and learning, student support services, implementing Bologna reforms, collaborative arrangements, and communication flow and decision-making structures), comparing how institutions are trying to enhance the quality of the relevant processes involved.

While we cannot offer any analysis on the links between external quality assurance and its effects on internal quality awareness and conduct, our own data do allow some notes on the extent to which internal quality procedures have been established at European HEIs. Indeed it seems that **internal quality assurance mechanisms are just as widespread as external ones**. Most often they focus on teaching. 82% of the heads of HEIs reported that they have internal procedures to monitor the quality of teaching, 53% also have internal procedures to monitor the quality of research (with 66% of HEIs defining themselves as research-based). 26% monitor other activities. Only 14% of the HEIs (9% of universities, 17% of other HEIs) do not have internal QA mechanisms, according to their presidents or rectors.

78 Holm et al. (2003), op.cit., section 3.3.
79 Quoted in Campbell and Rozsnyai, op.cit., p.62.
80 Brennan, J. and Shah, T. (2000), *Managing Quality in Higher Education: An international perspective on institutional assessment and change.* Buckingham: SRHE and Open University Press.

At the same time, the widespread existence of such mechanisms, at least as far as teaching is concerned, should not make us overconfident as to the inclination or capacity of institutions to really address or tackle important quality problems. Apart from resource constraints (too many students per professor, too little money for additional support through tutors, counsellors or information technology), the existing procedures may not be designed or used well enough to disclose the core problems. As one national student association points out with respect to the internal monitoring of teaching quality: "Quality assurance is most often dealt with by 'evaluation' and writing of standardized teaching reports, with hardly any active student involvement and recognition of substantial learning/student research problems. Quality is most often reduced to quantitative figures with little meaning. There is no concept of quality." One should note in this context that the questionnaires returned within our study reveal an acute quality awareness on the part of student associations, which has probably not been made sufficient use of by HEIs or by quality assurance agencies. Even though student assessments of the quality of teaching and related services would seem to be more than relevant, since they are on the receiving end of the provision, students are only involved in HEIs' internal quality assurance mechanisms in about half of the Bologna signatory countries. Only a minority of the students are satisfied with their involvement in such mechanisms. A noteworthy example of positive student involvement seems to be the UK, where students are not only systematically involved in internal QA mechanisms in a majority of HEIs, but are also very satisfied with this involvement. As far as QA agencies are concerned, there seems to be a noticable difference between EU- and non-EU countries: in the EU, a quarter of the agencies use students on their expert panels while in the accession countries only 13% have student representatives on their panels. Generally, student participation in the self-assessment of the institutions and in the framework of the experts' site visit interviews was much more widespread.[81]

Figure 14 - Internal quality procedures at HEIs in Europe: aggregate index

This aggregate index is based on HEI responses to three questions, namely whether they have internal mechanisms for monitoring quality with regard to teaching, to research and to other aspects of their mission. An aggregate score on a scale from 0 to 10 is computed for each country, based on the scores for each HEI within that country. The higher the index values, the higher the declared achievement of the Bologna goals with respect to the promotion of quality assurance. An index value of 10 indicates that all HEI within the respective country declared they had developed all three internal quality mechanisms.
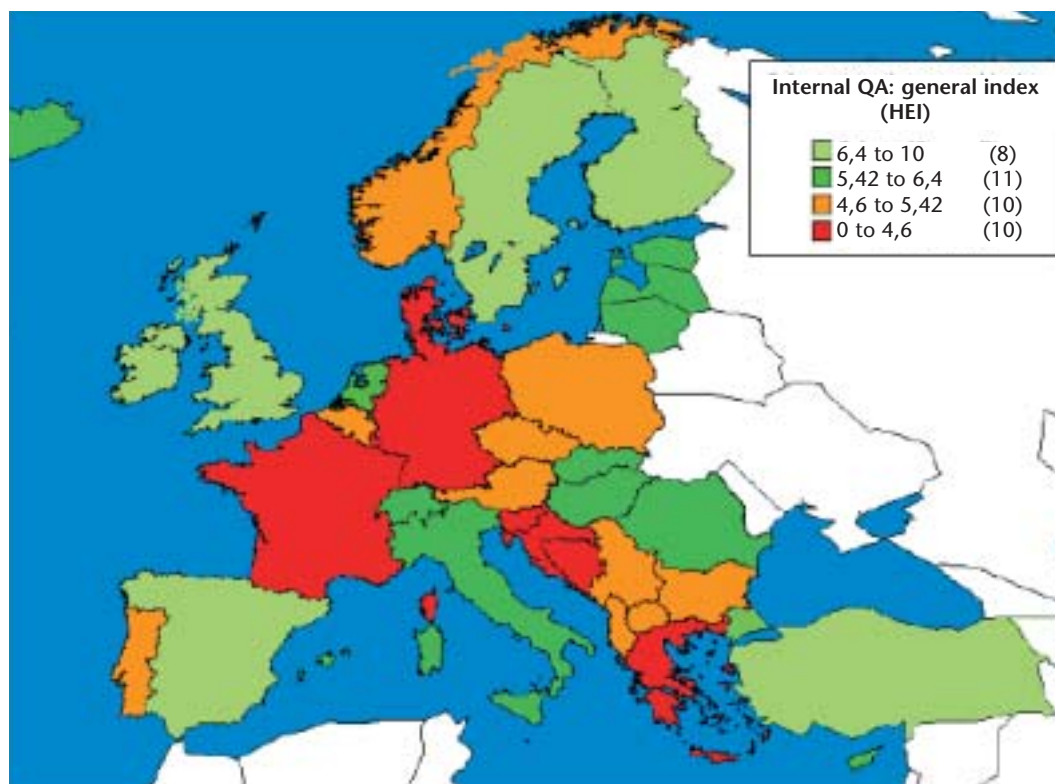
Source: Trends 2003

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81 Holm et al. (2003) op.cit., section 5.1.

To conclude our comments on internal quality procedures, we should draw attention to the fact that **aspects other than teaching and research are only being addressed in a quarter of the HEIs** (26%), even less at HEIs specialising on technology and engineering (18%). No data exists on the extent to which management, infrastructure and services are being reviewed by HEIs and how they conduct such reviews. Since external quality procedures only rarely focus on these themes, internal reviews would be all the more necessary to uncover existing problems.

An increasing amount of **benchmarking,** not just on curricular reform but also on management and issues of institutional development, seems to be emerging, especially within institutional networks. Existing initiatives, such as the benchmarking activities of the CLUSTER network, of the IDEA-League or of the Benchmarking Club of Technical Universities in Germany (organised by the CHE, the German Centre for Higher Education Development, a private foundation which focuses on issues of HE management and reform), Universitas21 or the Coimbra group, give very positive reports of their experiences with introducing a comparative perspective into their institutional management, particularly when institutions with a similar profile join forces to exchange such information.[82] Examples of such cooperation among institutions even include internal QA mechanisms.[83] Another attempt to organise benchmarking on individual aspects of university development on a European scale are the benchmarking activities organised by ESMU.[84]

On the whole, there seems to be an unmet need for institutionally led international benchmarking of given aspects of university management, to allow for exchange of good practice and possible solutions to common problems.

All in all, if we look at the European national HE systems in general, and abstract from individual models of good practice, internal institutional quality culture does not seem to be robust enough at this stage to make external evaluation unnecessary.

6.1.1.4 European cooperation in quality assurance

In the light of all these QA activities aimed at, or performed by HE institutions, as well as the few noted European benchmarking activities, one may ask more generally what added value can actually be associated with European cooperation in QA, which, after all, is supposed to be the focus of the Bologna activities in QA.

First of all, the recent trends which the already cited ENQA study on quality evaluation procedures pointed to, namely the increasing number of QA and/or accreditation agencies and the increasing mix of different evaluation methods used by each, may indeed have resulted from the **increased communication and exchange of good practice between the existing agencies and national authorities**, inside or outside of the framework of the Bologna process.

Our own data revealed the general attitudes toward different types and levels of European cooperation in QA. First of all, one should note that **a vast majority of ministries, rectors' conferences, HEIs and student associations agree that greater participation by European partners in the national QA systems is needed**. Many agencies already make use of international experts in peer reviews, but international experts on peer review panels still constitute a small minority, so such practice can clearly be extended. The most extensive use of foreign experts can be observed in smaller countries with a shared or closely related language, e.g. Netherlands and Belgium (Flanders), the Nordic countries, most extensively in Latvia, but also in the German accreditation agencies.[85]

The central question which many ministries, rectors' conferences and QA agencies are currently debating, however, concerns the **extent to which common structures are needed at a European level and what core elements such structures should comprise**. Is it enough to have

82 Report of the Rector of the TU Darmstadt, Prof. Wörner, at the HRK Conference on Quality Assurance in Europe, October 2002, http://www.hrk.de. Cf. also http://www.universitas21.com/collaborative.html and http://www.coimbra-group.be.
83 Thus the TU Darmstadt, for example, is cooperating with a few other universities, using the ETH Zürich departmental evaluation procedures and advice.
84 Cf. http://www.esmu.be.
85 Some examples of practices in respect of the selection and training of experts are included in Campbell's and Rozsnyai's study, op.cit., Part II, Annex 4.3.

a common network of different but compatible institutions of QA, or does one actually need a common agency? Especially regarding accreditation, institutions ask themselves whether it would be preferable to seek centralised recognition by one pan-European accreditation agency, or whether they would rather envisage a network of national accreditation agencies with each institution seeking accreditation from these national bodies, also for their jointly developed programmes. An intermediate solution sometimes suggested would be a common system, a franchise-like network with national agencies agreeing on a set of core elements, minimum standards and requirements for essential processes, topped up by additional procedures which differ from agency to agency but do not prevent them from recognising each others' results and labels. A fourth option consists in a possible addition of a trans-European label in the name of some transnational joint action of the various accreditation or quality agencies.

To convey the essentials of the ongoing discussion, one should note that advantages and disadvantages are cited for all options. On the pan-European end, a common agency would have the advantage of offering evaluation results or accreditation labels which are more readable for most users in and outside higher education, since one would not have to know the minutiae of national differences between evaluation procedures to understand the status and exact meaning of the results. However, the existence of a common agency would have the disadvantage of reducing national differences, i.e. of ignoring different cultures of communication, management and higher education in general. Thus one would lose some degree of sensitivity and differentiation with respect to national conditions. In contrast, if one maintained the current array of national QA agencies, creating transparency and defining a core of minimum standards for mutual recognition is a significant challenge. But at the same time, the opportunities for mutual stimulation, constant emergence and exchange of new practices could add to the flexibility of QA in Europe in such a system of multiple agencies. Considering the fact that notions of quality have been and will be undergoing constant change, adapting to new social needs and scientific practices, the loss of flexibility may be considered the most serious risk of creating one common agency.

So what are the current dominant attitudes of ministries, rectors' conferences and HEIs in this regard? While cooperation among existing national systems is widely welcomed, **only a quarter of the ministries and a little more than a third of the rectors' conferences would opt for a pan-European system for academic QA**. About a sixth of ministries and rectors' conferences would even welcome a global system for academic QA (the ministries of Bulgaria, France, Hungary, Portugal, Spain and Turkey, and the RCs of Belgium (French-speaking), Germany, Hungary, The Netherlands, Slovenia).

Regarding accreditation, the vast **majority supports national accreditation agencies and a system of mutual recognition among the agencies**. A pan-European accreditation agency would only be welcomed by a sixth of the ministries and a quarter of the rectors' conferences. The idea of a global accreditation agency only finds the support of one rectors' conference (Slovenia) and two ministries (Cyprus and Turkey).

While the majority of HEIs agrees with the preference for national accreditation agencies and a system of mutual recognition among these agencies, **nearly half of HEIs** (48%, 43% of universities, 52% of other HEIs), a remarkably large proportion in comparison with the national actors, **would welcome a pan-European accreditation agency**.

As may be expected, there are significant country divergences. One may even speak of regional clusters: in most accession countries where accreditation is more widely used than in the EU, but also in southern European countries (Italy, Spain, Portugal, Greece), in France and in SEE countries, the majority of institutions would welcome such a pan-European accreditation agency (see Table 3). By contrast, western and northern European countries show considerably less support for this option (averaging about a quarter of institutions in these countries). Interestingly, one should note that most countries in which national accreditation agencies have been established for a

number of years continue to see the need for a national accreditation agency while also opting for a pan-European agency. 17% of European HEI leaders would even favour a world-wide accreditation agency.

Table 3 - The need for different types of accreditation agencies or systems, as seen by HEIs per country

Percentages of heads of institutions who answered "Yes" to the question: "Do you see a need for … ?"

	A national accreditation agency	A system of mutual recognition between national accreditation agencies	A pan-European accreditation agency	A world-wide accreditation agency	No, there is no need for accreditation
COUNTRY	%	%	%	%	%
Albania	100,0%	100,0%	100,0%		
Austria	53,1%	25,0%	43,8%	12,5%	3,1%
Belgium	35,5%	64,5%	48,4%	12,9%	3,2%
Bosnia-Herzegovina	75,0%	75,0%	75,0%	25,0%	
Bulgaria	69,2%	76,9%	69,2%	30,8%	
Croatia	80,0%	80,0%	40,0%	20,0%	
Cyprus	80,0%	100,0%	80,0%	20,0%	
Czech Republic	62,1%	58,6%	34,5%	17,2%	
Denmark	31,1%	37,8%	22,2%	33,3%	17,8%
Estonia	85,7%	85,7%	85,7%	14,3%	
Finland	40,7%	48,1%	29,6%	7,4%	11,1%
France	35,9%	62,8%	59,0%	19,2%	2,6%
Germany	43,1%	72,4%	43,1%	15,5%	1,7%
Greece	95,0%	65,0%	70,0%	5,0%	
Hungary	69,2%	59,0%	61,5%	20,5%	
Iceland	100,0%	100,0%	50,0%		
Ireland	53,3%	73,3%	33,3%	6,7%	6,7%
Italy	59,3%	55,6%	59,3%	11,1%	
Latvia	65,5%	55,2%	37,9%		3,4%
Lithuania	73,3%	60,0%	40,0%	26,7%	
Luxemburg			100,0%		
Macedonia		100,0%	100,0%		
Malta	100,0%				
Netherlands	83,3%	75,0%	50,0%	8,3%	
Norway	86,2%	58,6%	34,5%	20,7%	3,4%
Poland	65,8%	68,4%	68,4%	21,1%	
Portugal	59,4%	75,0%	59,4%	9,4%	
Romania	20,0%	40,0%	66,7%	33,3%	
Serbia & Montenegro	83,3%	66,7%	50,0%	33,3%	
Slovakia	66,7%	55,6%	66,7%	11,1%	
Slovenia	33,3%	66,7%	66,7%		
Spain	60,7%	82,1%	60,7%	14,3%	
Sweden	66,7%	60,0%	6,7%	13,3%	6,7%
Switzerland	50,0%	50,0%	28,6%		7,1%
Turkey	78,9%	73,7%	68,4%	57,9%	5,3%
UK	34,1%	79,5%	9,1%	2,3%	13,6%

Source: Trends 2003

Thus, one may summarise that a consensus has emerged as to the **preferability of mutual recognition of national procedures over common European structures**. However, the objects and beneficiaries (or victims) of quality evaluation and accreditation, the higher education institutions themselves, are significantly more positively disposed toward common structures and procedures, perhaps in the hope of reducing the number and extending the scope of a given QA review.

But even with respect to the option of extending mutual recognition among national systems, the key question remains, under what conditions such recognition may occur. In addition to the already established consensus on key elements of QA methodology (self-evaluation, peer review, final public report), some **common criteria** will be unavoidable if such recognition is to occur. First experiments with mutual recognition of external QA procedures confirm that the quest for mutual recognition of external QA procedures of other agencies go hand in hand with the definition of a common set of criteria. One such initiative is being conducted by the Nordic QA agencies. Another attempt is the *Joint Quality Initiative* (JQI). The latter was started by the Dutch and Flemish QA agencies, but also includes a number of other QA agencies across Europe, on a voluntary basis. The initiative aims to develop criteria for quality evaluation and accreditation which would be flexible but shared, including Bachelor/Master descriptors and subject benchmarks. Currently, a common accreditation procedure between the Flemish and the Dutch agencies is being developed. If successful, such practice could be extended to the other agencies of the JQI. The recently launched *Transnational European Evaluation Project* (TEEP), funded by the European Commisssion and coordinated by ENQA, also attempts to develop common criteria for programme evaluation (currently in three different disciplines), using the descriptors developed by the Joint Quality Initiative and by the project *Tuning Educational Structures in Europe*. The most long-standing example of mutual recognition of other agencies is the *Washington Accord*, a multi-national agreement signed in 1989 by Australia, Canada, Hong Kong, Ireland, Japan (provisional status), New Zealand, South Africa and the UK. The Accord recognises the substantial equivalency of accreditation systems of signatory organisations, and the engineering education of programmes accredited by them. Thus, graduates of programmes accredited by the accreditation organisations of each member nation are considered as prepared to practice engineering at entry-level. Here the close link **between mutual recognition of agencies and mutual recognition of qualifications**, which the Prague Communiqué emphasised, has already become an international reality in a particular domain for a number of countries. In Europe, attempts to link QA agencies through ENQA with the academic recognition information networks ENIC/NARIC are still in the first phases. Issues for further work have been identified, such as how to improve communication between the networks and how to improve the definition of quality and recognition issues in non-formal education. Interesting examples of national agencies which combine both functions of QA and recognition of qualifications are the Network Norway Council, the Swedish *Hogskoleverket* and the Lithuanian Centre for Quality Assessment in Higher Education.[86]

The most recent ENQA study also observed that **more and more agencies are using standards and criteria in the evaluation procedures**,[87] not just in accreditation where this is of course a defining feature. Generally, one can say that the "standards" used in accreditation function as threshold values, while the "criteria" used more often in evaluation procedures tend to be reference points, which are not fixed but function as suggestions or recommended good practices against which the subject, programme or institution is evaluated.[88]

It is to be expected that the increased interest in, and use of criteria will help find a common ground on which mutual recognition among external QA practices may occur. Clearly a common understanding seems to emerge that, while common criteria are needed, these are to be understood and used as flexible points or references rather than hard standards or thresholds, similar to the current use of criteria in the UK's QA procedures. Whether such flexibility can be upheld also in the context of establishing a common ground for mutual recognition of accreditation procedures still remains to be seen.

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86 Campbell and Rozsnyai, op.cit., p.47.
87 Holm et al. (2003) op.cit., section 6.
88 Holm et al. (2003), op.cit., section 6.1.

In light of the increasing need of European and international regulatory frameworks for the delivery and quality assurance of HE degrees, UNESCO, finding itself best suited for such an approach, took the initiative to set up the "First Global Forum on International Quality Assurance, Accreditation and the Recognition of Qualifications in HE", also dealing with the topic of globalisation and HE, and of promoting HE as a public good.[89] In order to confront the mushrooming of national, regional and international activities in the field of international accreditation, QA related to e-learning and transnational and borderless education, and to confront the liberalisation in education services under the GATS, it is planned to compile directories of "trustworthy" accreditation agencies and of good practices.[90] While such meta-accreditation-like initiatives are seen by some QA and HE representatives as the reinforcement of an unwelcome trend toward standardisation, they are welcomed by others as an attempt to create transparency in an increasingly labyrinthine market of QA and accreditation agencies and procedures. Again, in QA as elsewhere in European higher education, the ultimate challenge consists in creating transparency, readability, exchange of good practice and enough common criteria to allow for mutual recognition of each others' procedures, without mainstreaming the system and undermining its positive forces of difference and competition – creating a single market without fostering monopolies, so to speak.

6.1.2   Key findings

- Increasing autonomy normally means greater independence from state intervention, but it is generally accompanied by a growing influence of other stakeholders in society, as well as by extended external quality assurance procedures and outcome-based funding mechanisms (management by results).

- All Bologna signatory countries have established or are in the process of establishing agencies which are responsible for external quality control in some form or another.

- Currently 80% of HEIs in Europe undergo external quality assurance procedures (quality evaluation or accreditation).

- The divide between accreditation procedures in the accession countries and quality evaluation in EU countries is narrowing: a growing interest in accreditation and the use of criteria and standards can be observed in western Europe, and an increasing use of improvement-oriented evaluation procedures in eastern European countries.

- The primary function of external quality assurance (quality evaluation or accreditation), according to the responsible agencies and the majority of HEIs, consists in quality improvement. Only in France, Slovakia and the UK, accountability to society is mentioned more frequently than quality improvement. Even accreditation agencies, traditionally more oriented toward accountability, have stressed improvement in recent years.

- Generally speaking, external quality procedures are evaluated positively by the HEIs. Most frequently, they are regarded as enhancing institutional quality culture.

- Two recent comparative studies observe a softening of opposition between institutional and programme focuses among QA agencies, and an increasing mix of the two focuses within the same agencies.

- Internal quality assurance procedures are just as widespread as external ones. Most often they focus on teaching. 82% of the heads of HEIs reported that they have internal procedures to monitor the quality of teaching, 53% also have internal procedures to monitor the quality of research. Only a quarter of the HEIs have internal QA procedures to address aspects other than teaching and research.

89 For the conclusions and recommendations of the UNESCO September 2002 meeting, see http://www.unesco.org/education/studyingabroad.
90 See UNESCO-CEPES (2003) *Preliminary Report on Trends and Developments in Higher Education in the Europe Region*, for the 6th Session of UNESCO-CEPES Advisory Board and the 2nd Meeting of the World Conference on Higher Education Regional Follow-up Committee for Europe Region, 9-10 September 2002.

- Ministries, rectors' conferences, HEIs, and students, generally prefer mutual recognition of national QA procedures over common European structures. However, the objects and beneficiaries (or victims) of quality evaluation and accreditation, the higher education institutions themselves, are significantly more positively disposed towards common structures and procedures than the actors at national level. Nearly half of HEIs would welcome a pan-European accreditation agency.

6.1.3   Future challenges

- A release of HEIs from state intervention will increase institutional autonomy and release universities' innovative potentials only if this is not then undone by mechanistic and streamlined ex post monitoring of outputs, or by an overly intrusive influence of other stakeholders with more short-term perspectives.
- The effectiveness of the quality evaluation procedures will depend to a large extent on their readiness to consider the links between teaching, research and other dimensions of institutional management. As complex systems, universities cannot react to a problem seen in one domain without also affecting other domains indirectly.
- Likewise, the efficiency and return on investment in quality reviews will depend on the synergies and coordination between the various national and European accountability and quality assurance procedures, as well as the funding mechanisms, under which institutions operate.
- The ultimate challenge for QA in Europe consists in creating transparency, exchange of good practice and enough common criteria to allow for mutual recognition of each others' procedures, without mainstreaming the system and undermining its positive forces of diversity and competition.

6.2 LIFELONG LEARNING: OLD AND NEW CHALLENGES FOR HIGHER EDUCATION INSTITUTIONS

"Lifelong learning is an essential element of the European Higher Education Area. In the future Europe, built upon a knowledge-based society and economy, lifelong learning strategies are necessary to face the challenges of competitiveness and the use of new technologies and to improve social cohesion, equal opportunities and the quality of life." (Prague, 2001)

6.2.1   Analysis

6.2.1.1   Context and definitions

The recent dramatic increase of the use of the term "lifelong learning" (LLL) might lead one to believe that we are dealing with a new development. Of course, the idea of lifelong learning is probably as old as humanity. Even its connection to higher education may be traced back more than 2300 years, since already the Platonic academies sought to foster what are now called "learning-to-learn" skills, encouraging students to think of learning as a lifelong process demanding constant care and attention. In more recent times, what one may call subsets of LLL, namely continuing education (CE), adult education (AE) and continuing professional development (CPD) have developed both in- and outside of the growing university sector. In some northern European countries there are strong traditions of "liberal adult education" (e.g. Denmark, Sweden and Finland) enhancing personal general education, while in other countries the original focus was on continuing professional development, e.g. in France, where CPD goes back to the French Revolution.[91] However, the upsurge of CE in the 1970s and 1980s and of LLL more recently, is a particularly striking development, both from the point of view of a rapid increase of users' demand and from that of a rise in political awareness, since it reflects profound changes in the status of knowledge and skills in society, changes which are and will be affecting universities more than their leaders may currently be able to address. Already by 1996, the year of the most recent Eurobarometer survey, 70% of all those polled said they wanted to continue learning and training throughout their lives, 56% believed education and training had become a necessity, 80% thought CE can improve their working lives and 72% that it would also improve their personal lives.[92]

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91 Jallade, J.-P. (2000) *From Continuing Education to Lifelong learning: A survey of current practice in four French universities.* Paris: Centre for Social Morphology and Social Policy, p.5.

92 The Eurobarometer data is mentioned by E.J. Thomas in: Osborne, M.J. and Thomas, E.J. (2003), *Lifelong Learning in a Changing Continent.* Leicester: NIACE, Chapter 1.

Before we begin to trace recent developments in LLL in higher education, we should face the often debated question of appropriate definitions. While LLL naturally comprises all contexts and stages of education, from pre-school to higher education and beyond, its use in the context of higher education is most often associated with continuing and/or adult education. As pointed out by E.J. Thomas in the most recent comparative study on university continuing education, definitions of continuing education and lifelong learning vary greatly across Europe. Indeed, the country reports of the mentioned study all begin by making their own national definitions transparent in order to avoid confusion.[93] Generally speaking, one may venture to say that, as far as the HE sector is concerned, LLL debates constitute the follow-up to the older debates on CE and AE. Continuing education stresses the fact that the education offer was resumed after an interval following an uninterrupted initial education. Adult education encompasses all education and training activities undertaken by adults for professional reasons, including general, vocational and enterprise-based training within a lifelong learning perspective. **CE, AE and LLL all share a focus on flexible access to the courses provided** (including learners without formal higher education or even secondary school qualifications) **as well as the attempt to respond to the diverse profiles and backgrounds of their students**. Even the recently stressed focus on learners' needs was already present in CE in some countries, although perhaps not as centrally and often only in an embryonic form. Indeed, some HE representatives feel that the comprehensive nature of the term LLL prevents it from offering enough conceptual leverage, preferring the use of the term CE in the context of higher education, which comprises the updating of skills, i.e. an economic agenda, and the inclusion of adults without formal degrees, i.e. a social justice agenda.

What may be called the "added value" of the new term of LLL is the central attention to the multiplicity of contexts in which learning can take place, both from the point of view of life phases (lifelong learning) and from that of the different realms of life (lifewide learning) which even includes non-formal education. As Thomas observes, after several international bodies such as UNESCO and the Council of Europe offered their definitions, the most deeply (and widely) considered definition of LLL may be that advanced by the European Commission after an extensive consultation of the Member States and accession countries on its Memorandum on LLL.[94] Lifelong learning is defined as: "All learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective."[95]

6.2.1.2   New focus on learners' needs

All of the recent definitions of LLL reflect a paradigmatic shift from teaching to learning which had already been highlighted in the OECD report on LLL (1996): the emphasis is being placed on identifying how learning can best be enabled.[96] Thus the needs and aspirations of the students, rather than the aims and values of academics, should constitute the driving principle in the creation of the offer provided. As may be expected, this demand orientation has been seen as an opportunity by some and a threat by other HE representatives.[97] Proponents of such a demand orientation see LLL as a key to opening the doors of HE institutions to the outside demands of society. Critics fear that the critical distance and uniqueness of universities in thinking ahead, beyond current demands and markets, is being undermined by such orientation. Hence discussions on LLL often expose a wider and deeper issue which HEIs are generally facing, namely the conflict between relevance of HE provision and the critical distance which constitutes the core of the university's uniqueness as an institution.

93 Osborne, M.J. and Thomas, E.J. (2003), *Lifelong Learning in a Changing Continent: Continuing Education in the Universities of Europe.* Leicester: NIACE.
94 E.J. Thomas in: Osborne, M.J. and Thomas, E.J. (2003), *Lifelong Learning in a Changing Continent*, Chapter 1.
95 European Commission (2001), *Making a European Area of Lifelong Learning a Reality* COM (2001), 678 final. Brussels: Commission of the European Communities, p.9.
96 OECD (1996), *Lifelong learning for All*. Paris, OECD. Quoted in: Askling, B., Henkel, M. and Kehm, B. (2001), Concepts of Knowledge and their Organisation in Universities, *European Journal of Education*, Vol. 36, No.3, p.345.
97 Mora, J.G. and Vidal, J. (2000), "Lifelong Learning in Spanish Universities: the market inside a public system", *European Journal of Education*, Vol. 35, pp. 317-327.

Of course, the new focus on learners presupposes that learners must be capable of identifying their own learning needs and of keeping track of their own learning progress, for which they need support from the institutions. Interesting steps in this direction are the VAP scheme in France ("*validation des acquis professionels*", i.e. accreditation of prior experience, achievement and learning, also known as APEAL or APL in other contexts) and the negotiated curricula at the Open University in the UK, to mention just two examples.[98] For the Bologna process, the focus on learners and the diversity of their needs in the context of LLL supports an overall trend of increased attention to learning processes and to student-centered approaches to curriculum development. Especially, the new focus on skills and competences which has been at the centre of some national and European discussions of curricular reforms (notably in Ireland, the UK, Denmark and in the context of the "Tuning" project mentioned in section 2) may well help the development and integration of LLL at universities and vice versa. Indeed, the so-called learning-to-learn skills are not just at the heart of lifelong learning strategies but form an integral component on the list of learning outcomes which are being developed as benchmarks for various subjects, both nationally and at European level. Hence it does not come as a surprise that the recent recommendations of the Bologna seminar on recognition and credit systems in the context of lifelong learning (Prague, June 2003) stresses the need to link lifelong learning strategies with the description of qualification frameworks, level descriptors and learning outcomes, as well as with the recognition of skills and competencies:

"Higher education institutions and others should:

- reconfirm their historical commitment to, and reconsider their approach and relationship to, lifelong learning, bring learning closer to the learner and interact more with local communities and enterprises;
- adopt internal policies to promote the recognition of prior formal, non-formal and informal learning for access and study exemption;
- reconsider skills content in courses and the nature of their study programmes;
- use the Diploma Supplement, ECTS credits and skills portfolios to record learning as well as to facilitate individual learning paths;
- express all qualifications in terms of explicit reference points: qualifications descriptors, level descriptors, learning outcomes, subject-related and generic competencies;
- integrate lifelong learning into their overall strategy, global development plan and mission;
- develop partnerships with other stakeholders.

Public authorities responsible for higher education should:
- clarify and define their goals with regard to lifelong learning and develop appropriate implementation strategies;
- develop new style national qualifications frameworks that integrate forms of lifelong learning as possible paths leading to higher education qualifications, as well as access qualifications, within this qualifications framework;
- take appropriate measures to ensure equal access to, and appropriate opportunities for success in lifelong learning to each individual in accordance with his/her aspirations and abilities;
- ensure the right to fair recognition of qualifications acquired in different learning environments. […]"[99]

6.2.1.3   Recent trends: extensive policy development

Since lifelong learning was added to the list of Bologna action lines in Prague, there is, as yet, no longitudinal comparison to be drawn with the previous *Trends reports*. Nevertheless, other political events on the European stage have made the issues of LLL particularly visible in the last two years. Most observers of these trends note the **apparent divergence between the high level of activity in terms of policy development** (where many actors have been intensely busy all over

98 See "Lifelong Learning in European Universities: Institutional Responses", *European Journal of Education* (2001) Vol.36, No.3. In particular: Jallade, J.-P., "From Continuing Education to Lifelong Learning in French Universities", pp. 291-304, "Henkel, M., The UK: the home of the lifelong learning university?" pp. 277-290, as well as Askling, B., Henkel, M. and Kehm, B., "Concepts of Knowledge and their Organisation in Universities", p.348.

99 Exert from the "Recommendations" of the Bologna Seminar on Recognition and Credit Systems in the Context of Lifelong learning, Prague, 5-7 June 2003.

Europe), on the one hand, **and the comparatively slow progress at HE institutional level**, on the other. But institutional development and national incentives are closely linked (see 6.2.1.4 below). Indeed, within institutions, the attention to LLL provision is most strongly hampered by national conditions such as decreasing or stagnating government grants for HE in general, increasing pressures on the expansion of the regular teaching provision due to the continuing growth of HE participation rates all over Europe, as well as by ever stronger pressures on increased research performance as the decisive ingredient of overall institutional reputation, at least at universities.

The need for national LLL policies is undisputed and was strongly pushed in the context of the consultation on the European Commission Memorandum on LLL of November 2000.[100] The *Trends 2003 survey* reveals that in 2003, a majority of countries have the intention or are in the process of developing a LLL strategy. Such policies already exist in one third of Bologna signatory countries, namely in Belgium, Denmark, Finland, France, Iceland, Ireland, The Netherlands, Norway, Poland, Slovakia, Sweden and the UK. The extent to which these policies focus on higher education or describe the precise role of various sectors in fostering LLL remains to be seen.

Figure 15 - LLL strategies developed at national level

LLL strategies developed by MoE or RC

- at least one (13)
- at least one in the initial stages (16)
- at least a planned one (7)
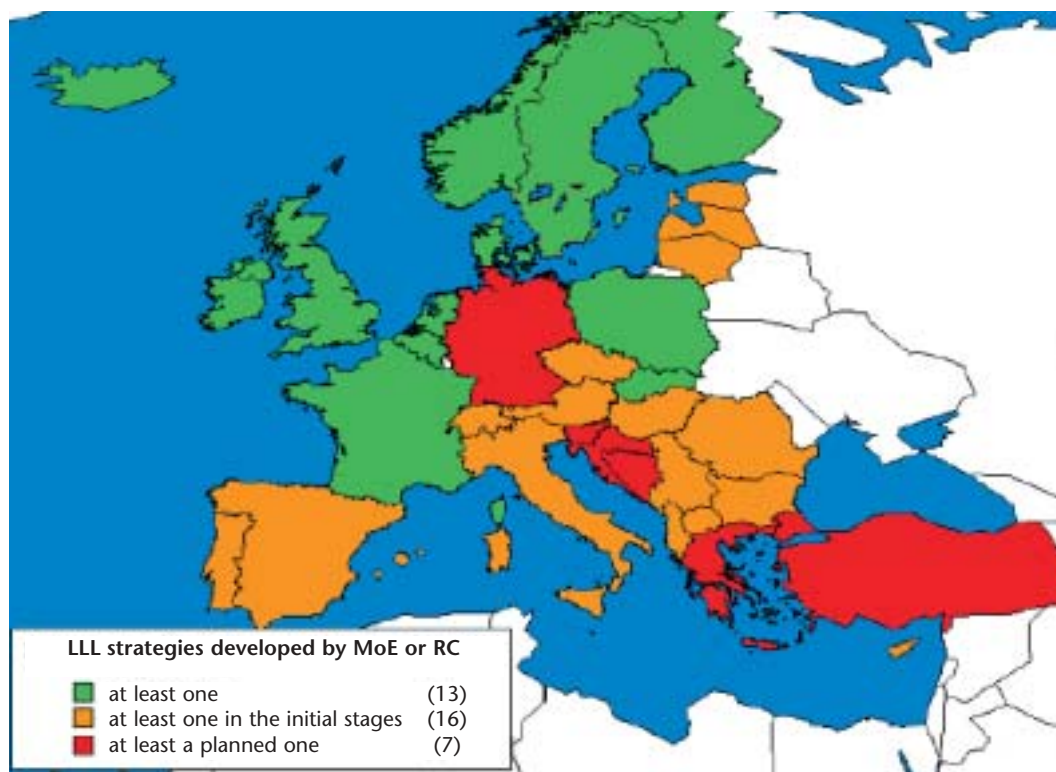
Source: Trends 2003

It is difficult to ascertain whether or not the policy development intentions are a direct outcome of the Commission's Memorandum on Lifelong Learning and the extensive national consultations following its publication. In several countries, of course, such policy development had already been defined before the policy push from the Commission, notably those countries which reported that a LLL strategy has already been developed (see Figure 15). Furthermore, the Commission's Memorandum should be seen in the context of a series of attempts by international bodies to draw attention to LLL, with the European Commission being perhaps the most effective in the sense of demanding a response from national policy-makers. Already in the late 1960s, the concept of LLL emerged more or less simultaneously in the Council of Europe, UNESCO and the OECD as "recurrent education", "adult education" and "*éducation permanente*", with the central idea being the development of coherent strategies to provide education and training opportuni-

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100 European Commission (2000), *Memorandum on Lifelong Learning*. Brussels: Commission of the European Communities. For the national reactions to the Memorandum, see http://www.europa.eu.int/comm/education/life/consultation_en.html. The European Commission had already organised a European Year of LLL in 1996, with hundreds of events, seminars, television programmes. The Memorandum on LLL (2000) can be seen as a later consequence of the European dialogue initiated in 1996 and of its conclusions as adopted by the Council of the EU.

ties for all individuals during their entire life.[101] One generation later, a UNESCO report on education for the 21st century (headed by Delors) presented the centrality of learning for the emerging knowledge societies, highlighting the role of the higher education institutions. The report was seen by its authors "as a 'necessary utopia' to mobilise the dwindling energies of the education community or to convince decision-makers in countries with scarce resources to invest more in education."[102] Subsequently, at the World Conference on Higher Education (1998), a UNESCO-led world-wide debate on higher education, LLL principles were incorporated into policies or proposals as "one of the major challenges and missions of HE at this stage in history" (UNESCO, 1998). Meanwhile, the OECD had shifted from a conceptual approach to more empirical analyses and took up the term LLL to emphasise formal and non-formal learning in a variety of settings. It also stressed the "shared responsibility" in organising, managing and financing learning systems.

Nevertheless, the strongest push in terms of policy development, was clearly brought about in the framework of the consultation on the Commission's Memoradum in 2001 involving 12 000 citizens in all EU and accession countries. The consultation revealed that there is a large consensus on the long-term goals, such as the need to contribute to regular updating of skills to help economic growth, to target low educational attainment, to intervene for social cohesion, as well as to create the basis for more active citizenship.[103] The consultation also identified six essential elements for coherent and comprehensive LLL strategies:

- partnership between decision-making levels and public providers, authorities and private businesses;
- insight into the demand for learning, including a redefinition of basic skills;
- adequate resourcing, involving a substantial increase in public and private investments in learning and ensuring its effective allocation;
- facilitating access to learning opportunities, including removal of obstacles to access;
- fostering a learning culture;
- quality assurance of provision and monitoring of progress through indicators.

Interestingly, the consultation on the Commission's Memorandum also revealed that many national LLL policies share a contradictory quality. **The potentially contradictory dimensions of most national LLL policies derive from their two coexisting agenda of social inclusion and economic competitiveness**. While social inclusion stresses flexible access and diversity of criteria for different learner profiles – with knowledge promoting integration into society, the competitiveness agenda tends to focus on excellence and efficiency in the updating of knowledge and skills. Here, knowledge often plays the opposite role of reducing exclusion and stratification in and between societies. If the competitiveness agenda is reinforced by tight national budgets, university provision of LLL may well be forced to let go of its social inclusion agenda. Askling et al. describe the effect on universities:

"On the one hand, open access is supposed to produce more social inclusion and cohesion and provide a higher degree of equality and societal participation. On the other, the appropriation and updating of knowledge through lifelong learning are part of a growing market in which cost effectiveness, income generation and competition play a major role. For the universities, this means that they have, as part of their commitment to their mandators (the State), to 'produce' well-prepared students and, due to economic restrictions, they have to be efficient (have a high through-put rate). The more carefully they can select students with well-known and trusted entrance qualifications, the better. Thus, the distribution of knowledge becomes selective."[104]

This potential contradiction between social inclusion policies and economic competitiveness is not supported, however, by the recently published *Thematic Innovation Scoreboard* of the

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101 Jallade, J.-P. and Mora, J.-G. (2001), "Lifelong learning: international injunctions and university practices", *European Journal of Education*, Vol.36, 3, p.362.
102 Jallade and Mora, op.cit., p.363.
103 These goals are not just highlighted in the national reports on the outcome of their consultation on the Commission's Memorandum (see http://www.europa.eu.int/comm/education/life/what_islll_en.html) but also confirmed in the recently published OECD thematic review on adult education: *Beyond Rhetoric: Adult Learning Policies and Practices* (2003). See also http://www.oecd.org/els/education/adultlearning.
104 Askling, B., Henkel, M. and Kehm, B. (2001) Concepts of Knowledge and their Organisation in Universities, Lifelong Learning in European Universities: Institutional Responses, *European Journal of Education* (2001), Vol.36, No.3., p.345.

European Commission (DG Research, 2002). In fact, the scoreboard confirms that there is a corre-lation (seen already in 2001) between participation rates and LLL, on the one hand, and the gen-eral innovative capacity of a given country, on the other. Taking the range of indicators as a whole, the "best performing" countries in LLL (Sweden, Denmark, The Netherlands and Finland, see figure 16) are also leading innovators on the scoreboard in general.[105]

Figure 16 - Participation in HE, LLL and ICT expenditure
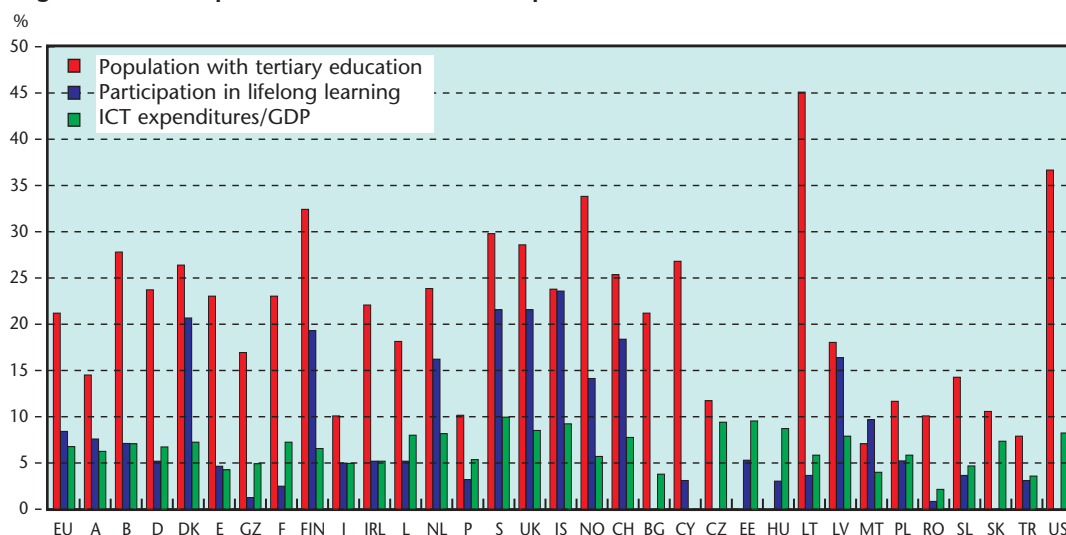
Source: European Innovation Scoreboard 2002, published by European Commission, DG Research

For our purposes, it is important to note that **most of the action undertaken at European and national levels does not target the higher education sector as such**. The vast majority of the current EU activities, for instance, derive mainly from employment strategies and the European social agenda, rather than from the framework of educational programmes and the HE action lines. As the EUA's *Consultation of Universities* on the Commission's Memorandum has already pointed out, part of the general problem for HEIs lies in the fact that their institutional constraints are not taken into account in the design of this action.[106] Similarly, the "Quality Indicators" recent-ly developed at European level (such as new skills for the learning society, learning-to-learn-skills, cultural and social skills, access, participation, investment strategies, guidance and couselling, accreditation and certification, quality assurance etc.) are very relevant for HEIs measuring their own progress in LLL, but have to be interpreted concretely in order to be usable and useful for HEIs.[107] Without targeted measures and incentives, however, it is unlikely that HEIs will be able to expand their current offer in LLL, since pressures to expand and reform traditional HE teaching and research are already overwhelming in times of stagnating budgets.

6.2.1.4   From policy to institutional realities

In light of such active policy development at international and national level, what can we report of the institutional development of lifelong learning?

First of all, it should be noted that, in a rapidly expanding market, western European HEIs (those for which data were available) have not shown themselves to be the most enthusiastic partici-pants in CE. Even in Scandinavia and the UK, where the CE offer at universities is relatively well developed, all the further education colleges and universities together provided only 10% of the continuing education offer in their countries in 1996. The rest of the provision was offered by employers and private training companies.[108] One problem which may partly explain this feeble involvement in the sector may be a lack of attention to the added value or "unique selling points"

105 European Commission (2002), *Thematic Innovation Scoreboard – Lifelong learning for innovation,* available at
    http://trendchart.cordis.lu/Reports/Documents/reports5.pdf.
106 Mary O'Mahony (2001) for the EUA, *EUA Consultation on the EC Draft Memorandum on Lifelong Learning.*
107 European Commission (2002), *European Report on Quality Indicators of Lifelong Learning. Fifteen Quality Indicators.* Report based on
    the work of the Working Group on Quality Indicators. Brussels: Eur. Com., DG EAC.
108 Thomas, E.J. (1999), "Current Issues in University Continuing Education", *Lifelong Learning in Europe,* 4(4), p.228.

which universities have to offer in comparison with other providers, and the generally less developed marketing awareness and skills of universities. Likewise, the national LLL strategies rarely define or highlight the particular role of higher education institutions in the provision of CE, AE or LLL. In any case, this task is best undertaken by universities themselves. Common sense would suggest that their primary role in pushing the frontiers of science and technology forward would also make them the most eligible providers of CE on the latest developments in scientific research. Furthermore, their traditional role of providing a critical forum for new ideas and scenarios of future social development would also suggest a privileged role in offering such fora to a wider public interested in accessing the most informed and differentiated reflections on far-reaching social and political issues. But are universities really playing this role? The extent to which they do seems to depend largely, but not only, on national or regional incentives. One should note that insofar as such incentives exist in today's Europe, they tend to foster the updating of skills for professional development rather than any other possible dimensions of LLL. "Liberal adult education" (i.e. general education for adults), for example, is going through hard times, despite its strong traditions in some northern European countries.[109] Indeed, with all the hype on LLL, many European CE centres are under pressure to remain cost-neutral or even to generate income.

Our own survey reveals that **attention to LLL at the strategic level of institutional development is clearly on the rise**. More than a third (35%) of HEIs report that they have developed an overall lifelong learning strategy for their institution. Another 31% say they are in the initial stages of this, 26% state they plan to develop one and only 5% do not see a need for this (3% gave no answer). With only small divergences between the two HE sectors (universities have developed strategies slightly more often than other HEIs), one should note that institutions specialising in business and economics have developed such strategies considerably more often (49%), and those specialising in technology and engineering have done so slightly more often (40%), than the average. Evidently, having more defined target groups and regular partnerships with outside stakeholders helps the development of LLL and the formulation of strategies.

Behind the European averages, one can detect major divergences between individual countries. Thus, the average is surpassed considerably in the Czech Republic, Denmark, Finland, France, Lithuania, Poland, Romania, Slovakia, Switzerland and the UK. It should be noted that all of the countries with national LLL strategies also have a higher than average proportion of HEIs developing such LLL strategies. The UK, Iceland, France, the Czech Republic, Slovakia and Romania have the highest percentages of HEIs with LLL strategies. In contrast, Germany, Austria, Italy, Hungary, Turkey, Romania and SEE countries have the lowest percentages of HEIs with LLL strategies.

Unfortunately, evidence on contents and effectiveness of such strategies could not be obtained in the context of this study. Some information could be obtained, however, regarding the incentives for developing LLL at HEIs. In a number of western European countries some funds are provided for new LLL projects. In Finland, for instance, performance-based funding is provided on the basis of high-quality adult education as well as targeted funding for innovative projects. In France, where flexible access is at the heart of the LLL policy, the principle of validation of previous studies and personal experiences of the students has been broadened and is now about to be applied on a wider scale at HEIs. In the UK, extra grants are provided for part-time students and student parents returning to higher education. Financial incentives are rarer and more limited in eastern European countries.

Interestingly, most of the student representatives consulted have observed changes of attitude to LLL over the last three years at institutions in their countries. Nearly half of the student representatives noted changes with respect to the courses offered to non-traditional students, a third observed a greater encouragement of LLL culture among students. However, little change was observed with respect to teaching methodologies or access policies.

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109 As Alan Rogers (2001) notes in a recent overview over adult education, "Today, in the UK as in much of Western society, under the influence of what is often called post-welfare 'neo-liberalism', occupational education is clearly privileged although some elements of personal growth and some minor elements of social transformation still survive. Contemporary adult education is dominated by instrumental concerns rather than empowerment, social transformation or personal fulfillment." (*Teaching Adults*, 3rd edition).

Figure 17 - Percentage of HEIs with a LLL strategy
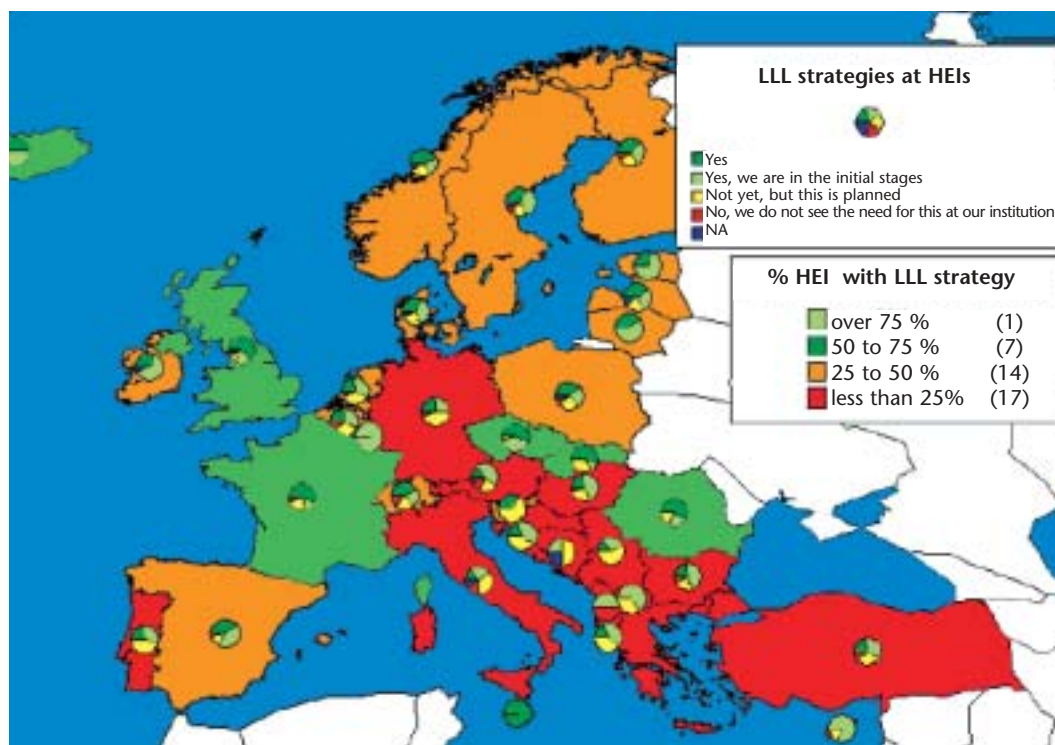
Source: Trends 2003

One outstanding aspect of LLL is certainly the **comparatively well-developed dialogue with stakeholders** which the development of LLL provision often involves. Regarding cooperation with stakeholders in the labour market, such as businesses, professional associations and employers, two thirds of the HEIs responded that they provide assistance to such stakeholders on request and respond to their expressed needs. Nearly half (49%) actually initiate joint programmes, with considerably more institutions doing so in Finland, Iceland, Sweden, Norway, Estonia, France, Ireland and the UK. Surprisingly, considering the more professional orientation of many of the non-university institutions, cooperation with such stakeholders is more developed at universities than at other HEIs, with the notable exception of institutions in The Netherlands, Bulgaria, Hungary, Turkey and Germany. More predictably, institutions specialising in business and economics cooperate more intensely with outside stakeholders than all other types of institutions.

In this context, one should point to the **problems associated with the market orientation of LLL provision** which are mentioned in the recent comparative studies. First of all, the problem of equity of access is mentioned frequently. Jallade and Mora observe that, as a result of the major difficulties on the labour markets during the 80s and 90s, the equity objective was progressively abandoned in favour of more career-related objectives in many universities.[110] In Spain, for example, LLL provision is mostly based at public universities but functions as a private system. Students have to pay the full cost of the programmes and grants are scarce.[111] More and more institutions in Europe gear their offer mainly to the employed in need of upgrading their skills, in order to limit costs or even allow income generation through their CE activities. In Eastern Europe, the updating of skills has been pushed particularly strongly because of the overwhelming demand for skilled labour in new professions since 1989. In many European countries (east and west), the lack of public funding for LLL activities is also noted. The most recent OECD review of adult education, which includes all providers (not just HEIs) in eight western European countries and Canada, observes that more than 50% of those trained did so with employers' support, and that employers tend to choose investments from which they expect a high return. Thus training tends to concentrate on workers who are already qualified and enjoy relatively high professional status in large companies, leaving out low-skilled or older workers, those in small companies, and those on tem-

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110 Jallade, J.-P. and Mora, J.-G. (2001), "Lifelong learning: international injunctions and university practices", *European Journal of Education*, Vol.36, 3, p.372.
111 Mora, J.-G. (2001), "Lifelong Learning Policies in Spanish Universities", *European Journal of Education*, Vol.36, pp.317-328.

porary contracts.[112] The drawbacks of this increasingly market-oriented LLL offer seems to be the focus on fee-paying students and the less regulated provision, often resulting in less rigorous attention to quality assurance.

European cooperation in LLL is as yet not very developed. In light of the intensity of European cooperation in research and in teaching, the creation of a "European Area of Lifelong Learning" propagated by the European Commission seems considerably more remote than the Commission's goal of creating a European Research Area or the intergovernmentally initiated European Higher Education Area. One should note that the intensity of cooperation between European HEIs with respect to the development or delivery of LLL courses or modules (mentioned by 25% of HEIs) reflects national encouragements in a quite symmetrical way. Given that the ministries of Austria, Denmark, Finland, Latvia, Lithuania, Poland, Malta and Spain (i.e. a quarter of all Bologna countries) report that European cooperation is actively encouraged, it is interesting to note that these countries also have an above average number of HEIs (33%-50%, the Europe-wide average being 25%) cooperating within a European network. Generally, however, cooperation in LLL course development is more frequent at local or national level (52%). One may even say that HE cooperation in LLL is not as developed as cooperation in the other core competences of HEIs. 38% of HEIs do not cooperate with other HEIs at all, as far as LLL development is concerned, either because they prefer to act independently from other HEIs in the development of their LLL offer, or because they do not offer LLL courses.

A few **European networks** and their recent projects should be highlighted as notable exceptions to the lack of intense European cooperation in university LLL. One is EUCEN (the European University CE Network) with its "*TRANSFINE*" project (*Transfer between Formal, Informal and Non-formal Education*), in which European procedures of assessing, accrediting and recognising prior learning are being developed.[113] Acknowledging that learning of equal value to university learning can take place, and that new knowledge can be produced outside the academy is, of course, a major rupture in the long-standing tradition of universities deciding what constitutes valuable knowledge, in addition to conserving, extending and transmitting it to the next generation.[114] The university's monopoly over the production of higher level knowledge is being challenged in order to do greater justice to the multiplicity and relevance of learning contexts. The project's aim consists in comparing current practice in several European countries and in proposing a European framework for procedures of accreditation and recognition of prior learning at universities. This constitutes a considerable challenge, not just because of the many differences across Europe but also given the fact that in some countries, e.g. in Germany and Italy, legislation constrains the actions of universities in this domain. Another recently launched EUCEN project responds to the need for new arrangements for quality assurance and enhancement to be put in place, in order to include new practices such as guidance services, accreditation of prior learning, open and distance learning and individual or customised programmes of learning. This EU-funded project, known as *EQUIPE* (*European Quality in Individualised Pathways in Education*), aims to develop a web-based toolkit designed to support quality projects in university adult learning, highlighting new forms of practice.

Another example of a European cooperation network focussing on LLL at higher education institutions is the EU-funded Thematic Network "*The NUCE*" which seeks to compare and build up good practice in CE in European universities with the help of national relay centers in each country.[115] The most recent comparative study of CE in Europe, by E.J. Thomas and others (mentioned above), is a prominent undertaking of this network. Some strategic university networks also have established working groups on LLL or e-learning which, in the long-term, even aim to develop common LLL and e-learning modules (such as the *World-Wide University Network*, *Coimbra Group*, *CLUSTER*, *IDEA-League*). But, for the most part, such development of common provision is in its initial stages.

112 OECD (2003), *Beyond rhetoric: Adult learning policies and practices.* Paris: OECD. Highlights: http://www.oecd.org/els/education/adultlearning, p.5.
113 See http://www.eucen.org for further details.
114 Pat Davies (2003), *Assessment and accreditation of informal and non-formal learning at universities: a summary of issues.* See http://www.eucen.org.
115 See http://www.thenuce.net.

However, while European cooperation seems to have a minor impact on LLL development, the **European-wide reform of degree structures does seem to affect LLL provision at many institutions**. 39% of heads of institutions find that the implementation of new degree structures also affects the design of LLL programmes and modules.

ICT is used by nearly two thirds of HEIs to support LLL offer and delivery, most often to support courses taught on site (60%). 41% also use ICT to support "virtual mobility" of staff and students, another 37% support their joint programmes with other institutions or stakeholders in this way. A below average use of ICT in LLL can be noted in Germany, Italy, Poland and particularly in Turkey. National support for ICT use in LLL is widespread, and reported in 17 Bologna signatory countries. In the UK, the *e-Universities* project was set up to encourage higher education institutions to work together to reduce the development costs of e-learning materials and thus to reduce barriers to market entry.

Concerning the organisation and management of LLL within a university context, the most salient problem is clearly the **lack of integration of LLL provision** in the general strategies, core processes and decision-making of the institution. Even in those countries where CE or LLL has been playing an important political role and where incentives are provided to develop LLL, such as France, the UK and Finland, CE centers are not always recognised on an equal footing with the rest of university teaching and research.

This lack of status or value attributed to LLL in the university may result from
- the perception that quality assurance of teachers and courses is less rigorously pursued than for the traditional core offer of the universities;
- the more tenuous link of such provision to research in the field;
- the more varied background of the teachers who provide LLL courses, who often have less traditional academic careers or even come from outside academia;
- the relatively low status of "practice" as a valuable realm of scientific reflection;
- the non-existent rewards or incentives (monetary or career advancement) for academics who offer CE courses in addition to their normal teaching and research activities;
- the lack of integration regarding the contents of LLL provision with the rest of the teaching or research offer.[116]

Thus, Jallade's and Mora's comments on the problems encountered by active promoters of LLL in the French university context may be said to apply to most European institutional realities of LLL in higher education:
"Significant efforts have been made [...] to make the supply of LLL more flexible, whether in terms of curriculum concepts, alternative delivery or certification. They are often supported by individual promoters who complain that they have to swim 'upstream' within an institution that does little to support them. The issue is both institutional and financial. The institutional challenge consists in organising, strengthening and harnessing these limited and often fragile experiments in the framework of a university policy. In other words, the challenge is 'mainstreaming'." [117]

As far as good practice at universities is concerned, very few are actually published. The useful compilation of good practices by the European Commission and Eurydice mentions only very few examples from the HE sector.[118] But two useful, recently published handbooks, derived from a comparative perspective on current institutional good practice in Europe, offer possible approaches to policies and instruments of integrating CE in universities and offer some guidelines as to how a successfully integrated LLL or CE offer could be developed.[119]

116 Many of these problems have already been highlighted in the synthesis report of the CRE's consultation of universities on the Memorandum on Lifelong learning, cf. Mary O'Mahony, *EUA Consultation on the EC Draft Memorandum on Lifelong Learning*, 2001.
117 Jallade, J.-P. and Mora, J.-G. (2001), "Lifelong learning: international injunctions and university practices", *European Journal of Education*, Vol.36, 3, p.372. According to Jallade and Mora, in the national survey of institutional practices in France only one university offered a fully-fledged coherent university LLL.
118 European Commission (2001), *Lifelong Learning Practice and Indicators. Commission Staff Working Document*. Supporting Document to the Communication from the Commission *Making a European Area of Lifelong Learning*; and Eurydice and CEDEFOP (2001), National actions to implement lifelong learning in Europe. Brussels: European Commission DG EAC.
119 Palomar, A. J., and Parellada, M. (2001), *Continuing Education in Universities: Policies and Instruments*, Columbus Papers on University Management. Paris: Columbus/UNESCO. The NUCE (2003), *European University Continuing Education. The Managers' Handbook* ed. by Valerie Mitchell. The Nuce, SOCRATES Publications.

6.2.2 Key findings

- Definitions of LLL and its relation to Continuing Education (CE) and Adult Education (AE) are still vague and diverse in different national contexts. Generally speaking, as far as the HE sector is concerned, LLL debates constitute the follow-up to the older debates on CE and AE, sharing their focus on flexible access to the courses provided, as well as the attempt to respond to the diverse profiles and backgrounds of their students. All of the recent definitions of LLL reflect an emphasis on identifying how learning can best be enabled in all contexts and phases of life.

- The need for national LLL policies is undisputed and was strongly pushed in the context of the consultation on the European Commission's Memorandum on LLL (November 2000). The *Trends 2003 survey* reveals that, in 2003, a majority of countries either have the intention or are in the process of developing a LLL strategy. Such policies already exist in one third of Bologna signatory countries, namely Belgium, Denmark, Finland, France, Iceland, Ireland, The Netherlands, Norway, Poland, Slovakia, Sweden and the UK.

- Most of the policies and actions undertaken at European and national levels do not target the higher education sector as such, and do not address the particular added value or conditions of LLL provision at HEIs.

- At institutional level, the UK, Iceland, France, the Czech Republic, Slovakia and Bulgaria have the highest percentages of HEIs with LLL strategies. Germany, Austria, Italy, Hungary, Turkey, Romania and the SEE countries have the lowest percentages of HEIs with LLL strategies.

- A majority of student associations have observed changes of attitude to LLL at institutions in their countries over the last three years. Nearly half of the student representatives noted changes with respect to the courses offered to non-traditional students, a third observed greater encouragement of LLL culture among students. Little change was observed with respect to teaching methodologies or access policies.

- The development of LLL provision reflects a clear market orientation and well-developed dialogue with stakeholders. Two thirds of HEIs provide assistance on request and respond to the expressed needs of businesses, professional associations and other employers. Nearly half (49%) actually initiate joint programmes, with considerably more institutions doing so in Finland, Iceland, Sweden, Norway, Estonia, France, Ireland and the UK. However, the inclination to respond directly to market needs is also one of the reasons for the critical attitude of many academics toward LLL units at HEIs.

- The Europe-wide reforms of degree structures seem to affect LLL at many institutions. 39% of heads of institutions find that the implementation of new degree structures also affects the design of LLL programmes and modules.

- European cooperation in LLL course development is still the exception rather than the rule.

- LLL provision is still generally marginalised, i.e. rarely integrated in the general strategies, core processes and decision-making of the institution. Even in those countries where CE or LLL has been playing an important political role and where incentives are provided to develop LLL, such as France, the UK and Finland, CE centers are not always recognised on an equal footing with the rest of university teaching and research.

6.2.3 Future challenges

- Most national LLL policies comprise two coexisting agenda of social inclusion, stressing flexible access and diversity of criteria for different learner profiles, and economic competitiveness, focusing on efficient updating of professional knowledge and skills. The latter dimension is often funded and developed in partnership with labour market stakeholders. If the competitiveness agenda is reinforced by tight national budgets and not counterbalanced by government incentives, university provision of LLL may well be forced to let go of the more costly social agenda.

- In order to position themselves in an expanding market and clarify the added value of their expertise, HEIs will have to make more of an effort to integrate LLL into their core development processes and policies.

6.3 DEVELOPING A DIVERSITY OF PROFILES

"Ministers agreed that more attention should be paid to the benefit of a European Higher Education Area with institutions and programmes with different profiles." (Prague, 2001)

6.3.1 Analysis

The concept of differentiation of profiles among institutions and programmes as beneficial for the attractiveness and competitiveness of the European Higher Education Area seems to be a more recently defined phenomenon, which has not resulted in many targeted actions so far. Of course, we may say that profiling can only occur if autonomy from state intervention is guaranteed in the core areas in which universities can define their profile, i.e. their teaching programmes and their research areas, their student and staff composition. For sure, this would seem to be a necessary condition, one which has not been accomplished fully in any European country. But even if it had, it would not be a sufficient one.

While greater autonomy is clearly a necessary condition for greater institutional differentiation, the various traditions of the primary functions, partners, funding sources, management cultures and decision-making structures from which European universities are emerging make it difficult for them to respond to increased autonomy and the increased need for diverse profiles. Therefore, they will need support and incentives to help them manage these changes. For the time being, there is no evidence of either well-functioning support for this transition, or of incentives given to universities to foster these changes. On the contrary, funding mechanisms continue to treat and measure universities in the same way, regardless of their attempts to set different emphases and define individual profiles. Even the widespread use of performance indicators, which would seem to encourage differentiation since different funding levels are applied on the basis of different levels of success, in fact serve to undermine the emergence of different profiles: the pursuit of new alleys and the establishment of new focuses which might be necessary to define that profile do not pay in terms of indicator performance. Subtler rewards and incentives would be needed to foster such developments.

As yet, judging from their basic self-definition as primarily teaching or research-oriented, from their self-understanding of the primary community they serve, the European landscape of higher education is remarkably homogeneous: 88% of universities and 50% of other higher education institutions describe themselves as both research-based and teaching-oriented. Only 9% of the universities but 46% of other HEIs define themselves as primarily teaching-oriented. Even less, only 1,3% of all universities think of themselves as primarily research-based, with no significant difference between the university and non-university sector in this respect (in fact, more "non-university" institutions adhere to this self-definition: 1,6%). The two sectors of university and "non-university" higher education are also not as clearly separable as some HE representatives might think. Of course, one should not misunderstand the category "other HEI" to constitute a relatively homogeneous group of teaching colleges. A significant sub-sector of the "other" HEIs, seems to be indistinguishable in basic orientation from the universities, with teaching and research orientation combined and the right to award doctorates (26% seem to fall into this group).

Finally, a majority of HEIs are primarily oriented toward their national community: 52% of universities and 46% of other HEIs see themselves as primarily serving a national community. The numbers of universities primarily serving a regional or local community (22%, of which 20% regional and 2% local) and primarily serving an international community (23%, of which 7% primarily European and 16% primarily world-wide) are similar. The other HEIs only differ significantly from the universities in having 10% more institutions serving a regional community and 5% less serving a world-wide one. Interestingly, there are enormous country divergences, especially between the universities: the world-wide orientation is considerably above the aggregate average in the university sectors of Austria (25%), Belgium (25%), France (29%), Germany (31%), The Netherlands (40%) and the UK (52%) (see Figure 18). We should also note that a significantly lower proportion of institutions specialising in technology and engineering see themselves primar-

ily as serving a regional community, while a higher proportion serves an international community (9% European-oriented, 22% world-oriented). An above-average proportion of HEIs specialising in business and economics are primarily oriented towards their national communities, with a below-average focus on the regional community.

**Table 4 - Primary target communities of HEIs in Europe**

Question to Heads of HEIs: Which community do you see your institution primarily as serving?

Community	Universities	Other HEIs	Institutions specialising in business & economics	Institutions specialising in technology & engineering
Local	1,8%	2,2%	3,8%	3,8%
Regional	20,3%	31,1%	16,3%	11,8%
National	51,9%	45,9%	60,2%	47,8%
European	6,9%	6,8%	9,0%	8,7%
World-wide	15,9%	10,3%	9,3%	21,6%
NA	3,1%	3,8%	1,5%	6,3%
TOTAL	**100,0%**	**100,0%**	**100,0%**	**100,0%**

Source: Trends 2003

Figure 18 - World-wide orientation index of HEIs in Europe

This index aggregates all those HEIs which answered "world-wide" when asked about the community they primarily serve, those which reported more incoming than outgoing students and those which mentioned priority areas for promoting their attractiveness outside Europe. The index values vary from 0 to 10, higher values meaning a higher orientation of the HEI within the respective country towards the world-wide community.
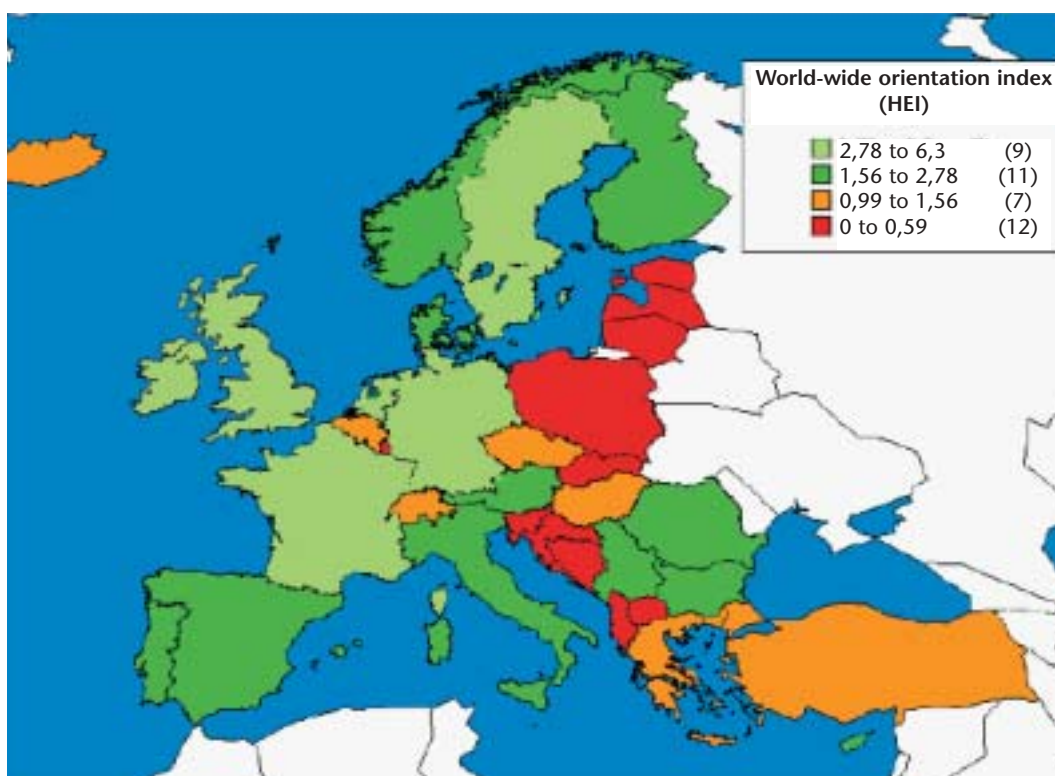

Source: Trends 2003

To move from the description of the status quo to the normative realm, we may conclude that institutional differentiation does not and cannot derive from the differentiation between teaching and research, or between international vs. regional orientiation. But more fundamentally, we should ask where the need for "different profiles" actually comes from. Should we really accept this as given? We would argue that such profiling is indeed urgently needed, for the following reasons.

To begin with, it should be recalled that, over all, the number of students in higher education in Europe has doubled in the past twenty-five years. The largest increases have been in the accession countries such as Poland, Hungary, Lithuania, Slovenia. Only in Malta, Bulgaria and Cyprus have there been no increases in enrollment.[120] Increased participation rates have resulted in a more diversified student body, demanding not just more time but also additional didactical skills from university teachers, in addition to the heightened need for counselling. Moreover, we all know that increased participation rates have not resulted in proportionately increased budgets. Indeed the average unit costs per student in the EU are now at less than half of the average unit costs per student in the United States. And, as the Commission "Communication on investing efficiently in education and training"[121] points out, the discrepancy will be exacerbated by the imminent EU enlargement. Such cuts have not "just" reduced investment in the most urgent maintainance and renewal of infrastructure (buildings and scientific equipment), they also reduce the professor/student ratio, i.e. the net attention each student will receive from his professors.

Severe budget problems are reported in most higher education systems in Europe. The most extreme example may have been reported by Italian HE representatives, where all university rectors threatened to resign *in toto* to protest against the severity of the underfunding and the most recent budget cuts. But the struggles in Britain and France have also been strong enough to attract significant media coverage beyond the world of HE proper. Thus French research institutes have had 30% of their operating and investment credits frozen for 2003. In Germany, the universities of Berlin even threaten to stop immatriculation because repeated cuts in government grants over a decade have not allowed basic provision for the expanded student population.

Figure 19 - Public and private R&D expenditure 2002
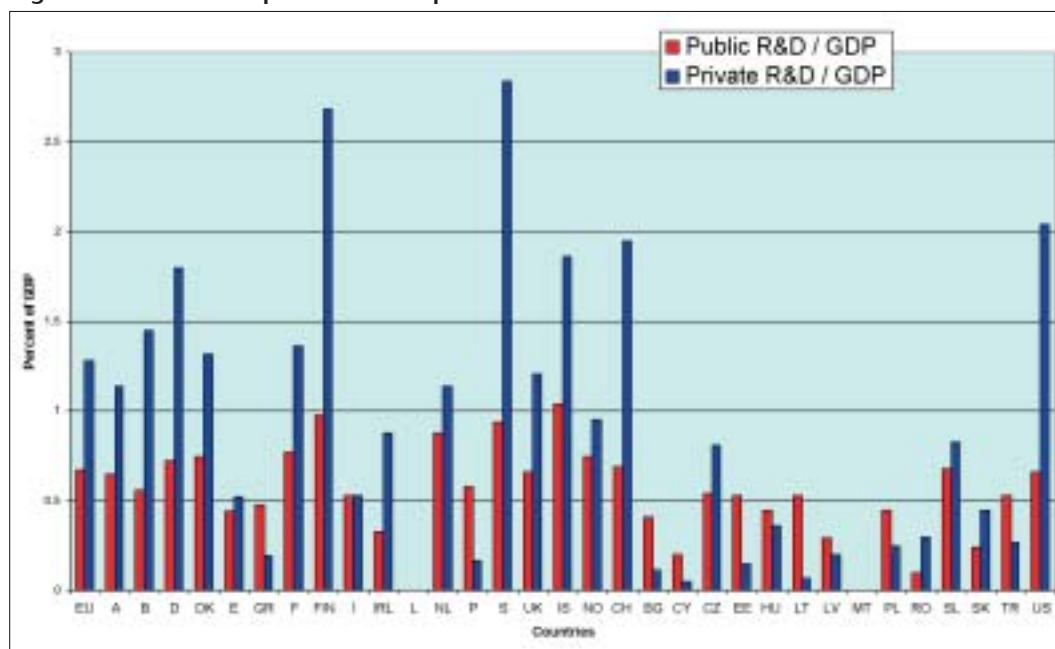
Source: European Commission, DG Research, European Innovation Scoreboard 2002

For our purposes, the British HE system may be the most telling example since, having undergone budget cuts already for two decades, it has been pushed more strongly than any other continental

120 *Key Data on Education in Europe, 2002*, European Union (2003).
121 Communication from the Commission, *Investing efficiently in education and training: an imperative for Europe*. COM (2002) 779.

European system towards a more market-oriented model. Such orientation has also been entering the debates on HE in the rest of Europe, e.g. in The Netherlands.[122] In the UK, attempts to broaden participation in HE for decades without increasing public funds have resulted not only in severe infrastructural and maintenance problems, but also in British universities having more diversified funding bases, higher tuition fees, more entrepreneurial activity and more dependence on industrially financed research than any other universities in Europe. While the current budgetary situation has of course led to even more urgent pleas to increase public funding for HE, the other proposed remedies again emphasise the trend of strengthening the managerial, market orientation of the universities. These consist in diversifying the funding base even further (the current one already being more diversified than any other European country), putting less emphasis on research in general with a concentration of research capacity in fewer institutions, in enhancing differentiation between types of institutions, as well as in further increasing tuition (which is already higher in the UK than anywhere else in Europe).[123] With the exception of the proposal to increase public funding, the other proposals would all enhance the trend in British HE to move even further away from continental European HE systems, where a sustained emphasis on HE as a public good and responsibility is still the dominant model, even though public funding is in the process of undermining this.

Of course, the UK's clearly market-oriented approach to HE and its funding problems may be seen as one possible route for other systems to follow. And indeed, while tuition fees may still be a taboo in many continental European countries, the idea of introducing a more market-oriented managerial perspective into the governance of higher education institutions by way of managing boards or supervisory councils composed predominantly of external stakeholders has already been realised in several countries. The primary aim of such boards consists in anchoring the university more firmly in the community by appointing prominent figures from that community. This is the case in The Netherlands (supervisory councils) and Austria (*Universitätsrat*), has been introduced in Denmark and some German *Länder* and is gaining ground in several other western European countries. Furthermore, fostering a diversified funding base for the steadily growing costs of research has already been the most favoured option in many continental European countries, including Sweden, Finland, Switzerland, Germany, i.e. countries with comparatively high public spending on R&D. The European Commission's recent Communication on *The Role of Universities* also clearly supports this notion of diversified funding bases as the only way out of the research funding dilemma, including the increase in private R&D funding. Naturally, such a development would force universities not just to present their strengths to competitive public funding agencies, but also to present sharper profiles in order to attract other external sponsors in an increasingly tough competition for private support.

But the need for a differentiation of institutional and programme profiles does not only result from increased competition for public and private funds and the best staff. Universities also have to perform a number of new functions which make the need for choices of profiles all the more evident. These include:

- playing a more active role in ensuring lifelong learning, especially the updating of knowledge and skills, taking account of the latest scientific developments;
- building up an internal management and quality assurance system which allows for optimal use of funds, pro-active human resource development and recruiting, and constant self-improvement of internal processes and performance;
- building up technology transfer services, to support the formulation of collaboration contracts with private partners, intellectual property agreements, submission of patents and emergence of spin-offs;
- building up a state-of-the-art IT infrastructure to give optimal support to research, teaching and services, in order to remain at the forefront of research and technological development;
- offering career services for students to facilitate their insertion into the labour market and allowing for rewarding career choices and sustainable employability;

122 Felt proposes a useful distinction between four different models of higher education management and discusses recent university reforms in the UK and to a certain point also in the NL in the light of the "managerial" model; see Felt (2003), op.cit., sections I.3 and II.1.
123 Cf. UK Dep. of Education's White Paper (2003), http://www.dfes.gov.uk/index.htm.

- communicating the most recent scientific developments and difficult ethical choices in scientific research to a frequently suspicious public;
- raising interest in science and technology among a larger part of the population, especially school children, who may thus be encouraged to embark on scientific study and career paths;
- attracting individuals to the university from traditionally less academically inclined backgrounds;
- designing curricula and choose research focuses of short- and long-term relevance to society and economic welfare, fostering the competitiveness of the national and European economy.

These new functions must be added to the old ones, of marrying teaching, which in Europe most often implies targeting a predominantly regional student body, with research, which by definition is international in scope. As we have already observed in section 4.5, institutions have to face a fundamental dilemma of conflicting values and orientation. On the one hand, they have to focus their efforts in times of budget constraints by becoming more and more selective in terms of areas, institutions, departments, researchers and students that show the clearest potential, in the fear that their flagship niches might otherwise lose the international race. On the other hand, they should contribute to building a society in which opportunities are optimised also for those who have not had the most privileged starting points.

All of these old and new functions and values should be realised against the backdrop of increased autonomy, which usually implies (see section 6.1.1.1) less state intervention, less state funding, greater stakeholder influence, a larger network of outside partners, more procedures of external quality assurance and accountability, as well as a diversified funding base. Indeed, the need to develop clearer profiles and to set priorities regarding the respective weight of the individual functions and areas to which these are to be applied becomes a matter of survival.

6.3.2 Key findings

- The readiness of HEIs to develop more differentiated profiles depends to a large extent on increased autonomy which is only partially realised in Europe, as well as on funding mechanisms which allow for such profiling, and which are not yet in place in any European country.
- Currently, a large majority of European higher education institutions are similar in the relative weight they attribute to teaching and research and in the dominance of a national orientation regarding the community they primarily serve.
- Only 13% of all HEIs (16% of universities) in Europe see themselves as serving a world-wide community, and only 7% see themselves as primarily serving a European community.
- Higher education institutions are facing an increasing need to develop more differentiated profiles, since the competition for public and private funds as well as for students and staff has increased in times of rapid internationalisation and even the globalisation of parts of the higher education market.

6.3.3 Future challenges

What does the diversification of functions and target groups mean for higher education institutions in Europe, their internal functioning and the reforms needed to position themselves in a new context of values, partners and users?

First, one may say that higher education institutions will have to make some difficult choices:

- Insofar as they are responsible for choosing their students, they may have to define more clearly how this student body should be composed, in order to be able to respond to its needs (different numbers of students with different needs, e.g. a certain number with special counselling needs, a certain number of students from different language backgrounds with language tuition needs, a certain number of students with clear potential for academic research careers with needs for additional research project exposure etc).

- If they choose to allow for a very diverse student body with diverse levels of performance and academic potential, they will also have to consider and develop the didactic capacities of their teaching and counselling staff more strongly than before.
- In order to recruit the right staff and students and choose the right partners in accordance with their mission and profile, they will have to prioritise whether they want to be more primarily teaching-oriented with a research base to support the teaching, or whether they want to focus primarily on research, with teaching to build up research-based careers in- and outside academia.
- If research is to be a priority, then the internationalisation of the university in its student body, staff composition, partnerships, external and internal communication and services will have to be pursued more aggressively to succeed in competing for people, projects and funding.
- For teaching or for research, emphases and profiles have to be defined, in order to attain critical mass and be attractive for outside partners. However, choosing such focus areas, which are meant to reflect scientific areas combining current strengths with the greatest future potential, goes against the grain of those scientific developments which are neither planable nor foreseeable. Hence such choices have to balanced: focus areas with more predictable medium-term potential may be complemented by more risky investments in emerging areas. Moreover, in order to ensure innovative potential even in the longer term, profiling choices have to be compensated by increased horizontal communication if new scientific areas and cooperation are to emerge continuously.

The second consequence for universities consists in addressing the new needs which arise from the diversified body of immediate partners in the planning and implementation of teaching and research. Universities will have to decide what the limits of these partners' interventions should be with due regard to academic freedom. What does academic freedom mean in a world of multiple stakeholder influence?[124] What is the "unique added value" which universities can contribute as institutions which distinguishes them from other organisations also offering teaching or research? In emerging partnerships with outside stakeholders, universities will have to reflect and defend their interests, responsibilities and long-term perspectives more strongly and vocally than before. Only if universities improve their ability to communicate the social and economic value attached to their "disinterested" long-term perspectives in teaching and research to these partners and to society at large, will they be able to flourish as institutions defined by their reflective distance and their capacity to identify emerging problems, and propose sustainable solutions.

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124 These questions concerning the relation between the new autonomy and academic freedom have been formulated and discussed by U. Felt (2003) in the above-mentioned study, *University Autonomy in Europe: Changing Paradigms in Higher Education Policy*, loc.cit.,section I.2.

7. CONCLUSIONS: TOWARD SUSTAINABLE REFORMS OF HIGHER EDUCATION IN EUROPE?

This study has looked at the Bologna Process from a predominantly institutional point of view. It has traced European and national trends pertaining to the overall Bologna goals and operational objectives, and has attempted to draw attention to implications, emerging consequences and possible interpretations of such developments at the level of higher education institutions. While concrete conclusions have already been drawn at the end of each individual section, we would like to emphasise four more fundamental conclusions which have emerged from the current phase of implementing the Bologna reforms at national and institutional levels, and which apply to any given ingredient of the reforms:

1. HOLISTIC BOLOGNA

Implementing the Bologna objectives becomes most fruitful if they are taken as a package and related to each other. Thus, for instance, the links between creating a Bachelor/Master degree structure, establishing an institution-wide credit transfer and accumulation system, and, less obvious to some, opening a lifelong learning perspective, have clearly emerged as points of synergy in the course of reflections on how to implement such reforms at institutional level. These links have crystallised around the issues of creating modular structures and defining qualification frameworks and profiles, as well as concrete learning outcomes in terms of knowledge, competences and skills. Other links were already clearly visible two years ago, such as the fact that creating compatible structures and improvement-oriented quality assurance would build trust and facilitate recognition, which in turn would facilitate mobility. In the course of devising viable academic solutions to some of the Bologna challenges, higher education representatives are now beginning to discover that, if given enough time, they may have embarked on more far-reaching and meaningful reforms than they had originally envisaged, enhancing attention to learners' needs as well as flexibility within and between degree programmes, institutions and national systems.

2. SYSTEMIC BOLOGNA

Implementing the Bologna objectives has far-reaching implications for the whole institution, not just in terms of reforming the teaching provision but also regarding counselling and other support services, infrastructure and, last but not least, university expenditure. Bologna reforms are not "cost-neutral"; they imply initial investments as well as increased recurrent costs of provision which affect other core functions of the institutions if overall budgets do not increase in real terms. But the systemic integration of the Bologna reforms does not just assert itself in administrative, infrastructural and financial terms. It also becomes blatantly obvious in the establishment of the new Bachelor and Master degrees, in which the role of research may have to be redefined. Master degrees, of course, cannot be reformed without due regard to their links and interrelation with doctoral-level teaching and research. To state the obvious, teaching cannot and should not be reformed at universities without considering its interrelation with research, from creating opportunities of recruiting young researchers to the integration of research projects into teaching.

3. AMBIVALENT BOLOGNA

In practically all action lines of the Bologna reforms, two potentially conflicting agenda emerge:

On the one hand, there is the competitiveness agenda, which aims at bracing institutions and national systems for global competition, using transparent structures and cooperation with European partners in order to survive or even thrive in an increasingly tough competition for funds, students and researchers. According to this agenda, greater concentration of excellence and centres of competence, clearer emphases of strengths and harsher treatment of weaknesses are necessary, even urgent, if European higher education is to contribute to reaching the lofty goal of Europe becoming "the most competitive dynamic knowledge-based economy in the world" by 2010 (Lisbon 2000).

On the other hand, there is the social agenda, stressing cooperation and solidarity between equal and unequal partners, flexible access, attention to individuals and individual contexts, including addressing issues such as the dangers of brain drain. It would be naïve to assume that the European Higher Education Area is being built only on the latter agenda.

Both agenda are needed to fuel the process. But they also have to be weighted, balanced and adapted to any given institutional context as well as interpreted in the light of each institution's attempts to find an appropriate niche in the national and European system of higher education. Well-meaning attempts to square the circle by trying to pursue both agenda, without any further differentiation regarding their application to different parts of each given system or institution, are bound to kill the fragile emerging institutional profiles which can be witnessed in a number of European countries. In any case, national legislators, policy-makers and institutional leaders must try to avoid the considerable danger of creating contradictory policies, incentives or measures if they want to succeed in either or both of these agenda. Instead, legislators and policy-makers should enlarge – and higher education institutions should use – the spaces for autonomous decision-making in order to allow for such differentiation.

4. FURTHERING BOLOGNA

So far, the Bologna Process has made considerable progress in achieving the objectives set out in 1999. This study proves once again that these objectives are realistic enough to inspire confidence in the developments leading to the European Higher Education Area. However, we should point to some neglected viewpoints and issues which seem to us to be essential for the creation of a genuine European Higher Education Area:

There seems to be a surprising lack of attention to the issue of facilitating a truly European-wide recruitment of professors. There are very few European higher education institutions which have a sizeable minority, let alone a majority, of non-national European academic staff. While this issue is addressed in the framework of the European Research Area, it belongs just as centrally to the creation of a European Higher Education Area and it should receive greater attention in the next phases of the Bologna Process. How can HEIs be encouraged to internationalise their recruitment procedures? What obstacles to long-term staff mobility must be overcome in terms of health insurance, pensions rights etc.?

Furthermore, the issue of free choice of study locations anywhere in Europe, even at undergraduate level at the very beginning of a study career, has not received attention. This is surprising, especially if one considers that the removal of all obstacles to such free choice would be the clearest evidence of a European Higher Education Area worthy of this name.

Linguistic matters are another neglected aspect of the EHEA: impressive progress is being made in terms of structural convergence, greater transparency, portability of grants etc., but many years of experience with EU mobility programmes have shown the effectiveness of language barriers. Is the total dominance of the English language in most institutions and programmes really the price we have to pay for true European mobility, or are there ways to safeguard Europe's linguistic and cultural diversity and convince students (and institutions) that "small languages" are worth bothering about?

Last but not least, if the enormous potential of using the Bologna objectives as a trigger for long-needed, fundamental and sustainable reforms of higher education in Europe is not to be wasted, the voice of the academics, within the institutions, will need to be heard and listened to more directly in the Bologna Process.

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9. ANNEXES

ANNEX 1 – AGGREGATE RESULTS OF TRENDS 2003 QUESTIONNAIRE TO HEADS OF HEIs

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EUA TRENDS III SURVEY: FINAL AGGREGATE RESULTS FROM HEIs

**760 completed questionnaires were received from HEIs and processed by this date.
However, these results do not include the questionnaires received from Armenia, Russia and the Ukraine.**

**The figures in the tables represent % of total cases.
"NA" means "not answered"**

**Produced for EUA by Bogdan Voicu, RIQL. Data processing made by RIQL.
12.02.2003**

TRENDS IN LEARNING STRUCTURES IN HIGHER EDUCATION (III)

QUESTIONNAIRE

FOR HEADS OF HIGHER EDUCATION INSTITUTIONS

This questionnaire is designed to gather information on the development of the Bologna Process. The collected information will:

i)   provide an important input to the Trends III Report[1] on developments in European higher education;

ii) be used to monitor, for the first time, the response of higher education institutions themselves to the creation of the European Higher Education Area;

iii) make a direct contribution to the next stage of the Bologna Process at the EUA Convention of Higher Education Institutions in Graz (May 2003) and the Summit of Ministers of Education in Berlin (September 2003).

The questionnaire has been structured to address the six main action lines of the Bologna Declaration and three additional priorities of the Prague Communiqué. The main purpose of this exercise is to analyse the impact of the Bologna Process on the daily reality of higher education institutions across Europe. *It is therefore essential that as many institutions as possible respond to this questionnaire.* The format of the questionnaire should facilitate rapid completion.

PLEASE RETURN THE COMPLETED QUESTIONNAIRE VIA E-MAIL BY 27 NOVEMBER 2002 TO EUA, USING THE EMAIL ADDRESS: trends3@eua.be

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1   The *Trends III report* is a follow-up of the first *Trends report* made prior to the signing of the Bologna Declaration in 1999 and the *Trends II report* presented in 2001 at the EUA Convention of European Higher Education Institutions in Salamanca and at the Summit of European Education Ministers in Prague.

About the Questionnaire

The European University Association (EUA) is addressing this questionnaire to:

i) EUA member universities;
ii) EURASHE (European Association of Institutions of Higher Education) members;
iii) Other higher education institutions taking part in the Socrates Programme and the Bologna Process.

Information from completed questionnaires will be transformed into aggregated, anonymous, statistical data and will be used only for the purposes specified above. Only aggregate data will be used by the authors of the report and by EUA. This report will be published on the Internet under www.unige.ch/eua and www.bologna-berlin2003.de. You will also receive a printed copy of the final Trends III report.

Format of Questionnaire

The questionnaire contains two types of questions. Some will invite you to choose one response from several options. An example of how to answer this type of question follows. Other questions offer the possibility of selecting more than one answer.

Please express your opinions as sincerely as possible.

Example question with answer

Q0.   **How many academic staff are employed at your institution?**

1.	Under 20
2.	20 - 40
3.	40 - 65
4.	Over 65

Before you begin:

Please indicate the following:

Country: ………………………………………………………………………........................……

City: ………………………………………………………………………......................……

Institution: ……………………………………………………………….......................……

Filled in by: ……………………………………………………………….......................…..

E-mail: ……………………………………………………………….......................……

Start of questionnaire

0. General Questions

Q1. How many full time equivalent students are enrolled at your institution?

1.	Under 1000	28,5
2.	1000-5000	33,5
3.	5000 - 15000	23,6
4.	15000 - 30000	9,4
5.	Over 30000	3,3
NA		1,7
Total		100,0

Q2. How would you describe the profile of your institution?

1.	Primarily research-based	1,5
2.	Primarily teaching-oriented	31,5
3.	Both research-based and teaching-oriented	64,9
NA		2,1

Q3. Which is the highest level (or equivalent) to which your institution trains students?

1.	Bachelor	20,6
2.	Master	23,5
3.	Doctorate	51,1
NA		4,8

Q4. Which community do you see your institution primarily as serving?

1.	Local	1,9
2	Regional	26,9
3.	National	48,3
4.	European	6,8
5.	World-wide	12,5
NA		3,5

Q5. Does your institution have a Bologna coordinator?

1.	Yes	36,3
2.	No	61,8
NA		1,9

Q6. If yes, please specify what position this coordinator holds.

1.	Administrative	8,2
2.	Academic	11,6
3.	Both	16,0
4.	Not applicable	61,1
NA		3,1

Q7. **In general, how aware do you consider the academic staff, administrators and students in your institution to be regarding the Bologna Process?**

Q7_1. Academic staff:

1.	Very much aware	12,3
2.	Reasonably aware	51,6
3.	Not very aware	28,7
4.	Almost completely unaware	4,4
NA		3,0

Q7_2. Administrative staff:

1.	Very much aware	10,1
2.	Reasonably aware	40,8
3.	Not very aware	35,0
4.	Almost completely unaware	11,1
NA		3,0

Q7_3 Students:

1.	Very much aware	4,9
2.	Reasonably aware	29,8
3.	Not very aware	41,2
4.	Almost completely unaware	20,8
NA		3,4

Q8. **Would you say that, in your country, the legal framework supports or undermines autonomous institutional decision-making?**

1.	Significantly supports	11,9
2.	Supports	38,4
3.	Supports and undermines to varying degrees	40,6
4.	Undermines	5,2
NA		3,9

Q9. **Would you say that, in your country, the mechanisms for financing higher education support the implementation of the Bologna Process?**

1.	Significantly support	4,2
2.	Support	44,7
3.	Offer no support	41,3
4.	Work against the implementation of the Bologna Process	4,0
NA		5,7

Q10. **Which statement best represents your opinion regarding the creation of a European Higher Education Area (EHEA)?**

1.	It is essential to make rapid progress towards the EHEA	67,6
2.	The EHEA is a good idea, but the time is not yet ripe	21,2
3.	I do not trust the idea of the EHEA	1,2
4.	I do not have an opinion on the EHEA	6,3
NA		3,8

1. Degree Structures and Curricula

Q11. Does your institution have a degree structure based on two main cycles (Bachelor, Master) as envisaged by the Bologna Declaration, in most academic fields?

1.	Yes, we already had it before the Bologna Declaration	32,3
2.	Yes, we introduced it as a result of the Bologna Process	20,9
3.	Not yet, but this is planned	36,2
4.	No, we do not plan to do this.	7,5
NA		3,2

Q12. Has your institution recently initiated a reform of the curricula in connection with the Bologna Declaration?

1.	Yes, in all departments	27,7
2.	Yes, in some departments	24,8
3.	Not yet, but we will do so in the near future	33,3
4.	No, we do not see the need for this in our institution	10,9
NA		3,2

Q13. In your institution, how important is the concern with the "employability" of graduates when designing or restructuring the curricula?

1.	Very important	55,7
2.	Important	35,8
3.	Not very important	5,3
NA		3,2

Q14. Are professional associations and employers involved in the designing and restructuring of curricula with the relevant faculties and departments?

1.	Yes, closely involved	31,5
2.	Yes, occasionally involved	40,3
3.	Rarely	25,1
NA		3,1

Q15. With a two-cycle degree structure, do you expect your students to leave after a Bachelor degree, or to continue at Master level at your institution?

1.	Many will leave our institution after a Bachelor	16,9
2.	Some will leave and some continue at Master level	32,0
3.	Many will continue at Master level at our institution	29,4
4.	Difficult to say at this stage	13,6
NA		8,0

Q16. In the framework of the two-cycle structure, has your institution recently defined the entry requirements for the Master level programmes?

1.	Yes, within an overall institutional policy	29,7
2.	Yes, each department/faculty takes care of its programme conditions	26,4
3.	No, our institution has not yet discussed such issues	19,4
4.	Not applicable	18,1
NA		6,4

Q17. **If your institution awards doctoral degrees, what structure of doctoral degree studies exists at your institution?**

1.	Individual tutoring with supervisor only	17,8
2.	Taught courses in addition to tutoring	32,2
3.	Not applicable	37,3
NA		12,7

Q18. **How much priority does your institutional leadership attach to the development of joint curricula with institutions in other countries?**

1.	High	31,2
2.	Medium	42,3
3.	Low	24,4
NA		2,1

Q19. **How much priority does your institutional leadership attach to the development of joint degrees with institutions in other countries?**

1.	High	31,1
2.	Medium	37,2
3.	Low	28,2
NA		3,6

2. Recognition of Degrees

Q20. **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	3,1
2.	Reasonably aware	27,8
3.	Not very aware	42,5
4.	Almost completely unaware	16,8
5.	No information available	7,4
NA		2,3

Q21. **Does your institution co-operate with the ENIC/NARIC of your country?**

1.	Yes, there is close cooperation	20,7
2.	There is only limited cooperation	23,8
3.	There is no cooperation	24,5
4.	I don't know what ENIC/NARIC is.	28,0
NA		3,0

Q22. **Do you think that the emerging European Higher Education Area will facilitate the processes of academic recognition?**

1.	Yes, very much so	54,4
2.	Yes, slightly	20,9
3.	Difficult to say at this stage	20,3
4.	It might complicate recognition processes	0,8
5.	I don't think it will have much impact	0,9
NA		2,7

Q23. **Does your institution have institution-wide recognition procedures?**

(several answers allowed; please fill in "" for each selected choice)*

Q23_1 Yes, for the recognition of foreign degrees	57,9
Q23_2 Yes, for periods of study abroad	81,9
Q23_3 Yes, for periods of study in another institution in our country	65,6
Q23_4 Yes, for degrees from other institutions in our country	65,1
Q23_5 None	5,5

3. Credit Systems

Q24. **Does your institution use a credit accumulation system?**

1.	Yes, ECTS	50,0
2.	Yes, but not ECTS	22,4
4.	Not yet	22,5
5.	We do not intend to implement one	1,8
NA		3,3

Q25. **If your institution has introduced a credit system, on what basis do you now award degrees / diplomas?**

1.	On the basis of accumulated credits only	20,4
2.	On the basis of accumulated credits plus traditional end of year exams	46,8
3.	Only on the basis of traditional exams	14,4
4.	Not applicable	13,3
NA		5,1

Q26. **Does your institution have a credit transfer system?**

1.	Yes, ECTS	68,0
2.	Yes, but not ECTS	11,9
3.	Not yet	16,3
4.	We do not intend to implement one	1,2
NA		2,6

Q27. **If your institution has a credit system, is it also applied at the doctoral level?**

1.	Yes	12,9
2.	Not yet	20,4
3.	We do not intend to apply this system at the doctorate level	11,3
4.	Not applicable	47,4
NA		8,0

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

1.	Often	3,1
2.	Occasionally	50,1
3.	Never	41,1
NA		5,7

4. Promotion of Mobility

Q29. Has outgoing student mobility increased at your institution over the last three years?

1.	Significantly	33,1
2.	Slightly	40,8
3.	Not at all	14,6
4.	No, on the contrary it decreased	5,1
5.	No information available	3,7
NA		2,6

Q30. Has incoming student mobility increased at your institution over the last three years?

1.	Significantly	32,8
2.	Slightly	42,7
3.	Not at all	15,7
4.	No, on the contrary it decreased	2,4
5.	No information available	3,4
NA		2,9

Q31. When comparing incoming and outgoing student mobility, is there an imbalance?

1.	Significantly more incoming than outgoing students	20,7
2.	Similar levels	27,3
3.	Significantly more outgoing than incoming	44,2
4.	No information available	4,5
NA		3,4

Q32. Do you expect the two-cycle degree structure will provide more opportunities for horizontal mobility (moving from one faculty or institution to another within a degree cycle)?

1.	Significantly	23,9
2.	Slightly	50,4
3.	Not at all	18,9
4.	On the contrary, it will decrease	1,9
NA		4,8

Q33. Do you expect the two-cycle structure will provide more opportunities for vertical mobility (moving from one institution to another for the next cycle of study - e.g. from Bachelor to Master)?

1.	Significantly	44,0
2.	Slightly	43,1
3.	Not at all	7,4
4.	On the contrary, it will decrease	0,0
NA		5,5

Q34. To improve the conditions of student mobility, has your institution significantly improved any of these services in the last two years? *(several answers allowed; please fill in "*" for each selected choice)*

Q34_1 Welcome and orientation services	77,6
Q34_2 Accommodation facilities	56,9
Q34_3 Job opportunities	13,3
Q34_4 Counselling services	59,6
Q34_5 Academic tutoring	57,4
Q34_6 Information on study opportunities in other institutions	56,4
Q34_7 Language training	60,3
Q34_8 Social and cultural activities	57,9
Q34_9 Other (please specify: ……………….....)	5,2

Q34_ 9OTH which other aspects has your institution improved in order to improve student mobility?

		Frequency	Percent
0	No response	716	94,8
1	International Commission	2	0,3
2	Traineeship opportunities	1	0,1
3	Pastoral care	3	0,4
4	Practical internship in companies	1	0,1
5	Artistic production	1	0,1
6	Students and families association welcome, administrative help	2	0,3
7	Buddy system	1	0,1
8	Facilities for incoming students, couses in English	5	0,7
9	Increase of personnel at the IRO	1	0,1
10	Introduction of Common Framework	1	0,1
11	Guest student club	1	0,1
12	Brochures	1	0,1
99	NA	19	2,5
Total		755	100,0

Q35. Apart from ERASMUS grants, are there other stipends for student mobility?
(several answers allowed; please fill in "" for each selected choice)*

Q35_1 Yes, from the national authorities	50,5
Q35_2 Yes, from the regional/local authorities	27,8
Q35_3 Yes, from the private sector	21,3
Q35_4 Yes, from charitable/religious bodies	9,7
Q35_5 Yes, from the institution's own sources	39,9
Q35_6 Yes, from other international sources	33,3
Q35_7 No	17,3

Q36. Has teaching staff mobility increased at your institution over the last three years?

1.	Significantly	18,3
2.	Slightly	47,7
3.	Not at all	27,2
4.	No, on the contrary it decreased	2,6
5.	No information available	2,0
NA		2,3

5. Quality Issues

Q37. Do you have internal mechanisms for monitoring quality in your institution?
(several answers allowed; please fill in "" for each selected choice)*

Q37_1 Yes, with regard to teaching	82,4
Q37_2 Yes, with regard to research	52,7
Q37_3 Yes, with regard to other activities in the institution (Please specify: ....)	26,3
Q37_4 Not yet established	13,8

Q38. Do external mechanisms for monitoring quality assurance and/or providing accreditation exist in your country?

1.	Yes	79,2
2.	No	16,1
NA		4,7

Q39. What do you see as the most important feature of the existing external quality assurance and/or accreditation procedures in your country?

1.	Public accountability	19,4
2.	Enhancing institutional quality culture	39,2
3.	Improving higher education across the country	27,1
4.	No important feature	2,0
5.	Not applicable	6,2
NA		6,1

Q40. If your institution has been the subject of programme accreditation, has this process been generally helpful?

1.	Yes	65,7
2.	No	8,6
NA		25,6

Q41. Do you intend to encourage such programme accreditation in the future?

1.	Yes	81,4
2.	No	7,4
NA		11,2

Q42. In your opinion, considering the emerging European Higher Education Area and globalisation trends, is there a need for :

(several answers allowed; please fill in "" for each selected choice)*

Q42_1 A national accreditation agency	54,1
Q42_2 A system of mutual recognition between national accreditation agencies	60,9
Q42_3 A pan-European accreditation agency	48,4
Q42_4 A world-wide accreditation agency	17,2
Q42_5 No, there is no need for accreditation	3,7

6. Life-Long Learning

Q43. Has your institution developed an overall strategy regarding Life-Long Learning (LLL) initiatives?

1.	Yes	35,1
2.	Yes, we are in the initial stages	30,8
3.	Not yet, but this is planned	26,0
4.	No, we do not see the need for this at our institution	5,0
NA		3,2

Q44. How does your institution cooperate with professional associations, employers, and other stakeholders in developing LLL programmes?

(several answers possible; please fill in "" for each selected choice):*

Q44_1 We initiate joint programmes	48,6
Q44_2 We respond to their expressed needs	65,9
Q44_3 We provide assistance on request	62,7
Q44_4 Not applicable	14,1

Q45. Does your institution cooperate with other higher education institutions in the development and/or delivery of LLL modules or courses?

(several answers possible; please fill in "" for each selected choice):*

Q45_1 Yes, as part of a local or national network	52,4
Q45_2 Yes, as part of a European network	25,0
Q45_3 Yes, as part of a wider international network	10,6
Q45_4 No, we act independently	22,3
Q45_5 Not applicable	16,1

Q46. Does the implementation of new degree structures (Bachelor/Master) affect the design of LLL programmes and modules?

1.	Yes, they are connected	39,1
2.	No, they are designed separately	27,1
3.	Not applicable	28,2
NA		5,6

Q47. Does your institution use information and communication technology to support LLL offer and delivery? (e.g. internet, distance-learning based modules)
(several answers possible; please fill in "" for each selected choice)*

Q47_1 Yes, to support courses taught on site	51,3
Q47_2 Yes, to support virtual mobility of staff and students	34,5
Q47_3 Yes, to support joint programmes with other institutions or stakeholders	30,1
Q47_4 Yes, in other ways *(please specify:………………)*	3,2
Q47_5 No, not yet	23,7
Q47_6 Not applicable	11,9

Q47_4OTH Other ways to use ICT for LLL

		Frequency	Percent
0	No response	716	94,8
1	To support courses offered in our own network	2	0,3
2	E-learning	5	0,7
3	Invitation for courses on Internet	2	0,3
4	For advertisements	1	0,1
99	NA	29	3,9
Total		755	100,0

7. Role of Higher Education Institutions and Students in the EHEA

Q48. In your opinion, is your institution already playing an active role in the construction of the European Higher Education Area?

1.	Yes, very active	10,8
2.	Reasonably active	41,5
3.	Not very active	25,1
4.	Not yet	17,1
5.	We do not think this is a priority	2,2
NA		3,3

Q49. What can be done to increase the role played by your institution?
(several answers possible; please fill in "" for each selected choice)*

Q49_1 Reform legislation to allow institutions more room for initiative	36,6
Q49_2 Involve institutions more directly in the process	59,1
Q49_3 Provide clear financial incentives for institutional involvement	75,0
Q49_4 Establish a monitoring and reporting system	29,6
Q49_5 Allow for greater competition and cooperation between institutions across Europe	27,5
Q49_6 Other *(please specify: …………………………………..)*	2,2

Q49_6OTH Other ways to increase the role played by HEI in constructing EHEA

		Frequency	Percent
0	No response	739	97,9
1	Disseminate info/ideas at faculty/department level	2	0,3
2	Coordinate academic calendars	1	0,1
3	Train all academic and administrative staff	1	0,1
4	Staff developement	1	0,1
5	Active management support from the Ministry of Education	1	0,1
6	Programmes in English language policy	2	0,3
7	Allow European and/or international accreditation procedures	1	0,1
8	Local reform and legislation change needed	1	0,1
9	Bilateral and multilateral agreements for cooperation	1	0,1
99	NA	4	0,5
Total		755	100,0

Q50. How have you involved your students in the implementation of the Bologna Process at your institution?
(several answers possible; please fill in "" for each selected choice)*

Q50_1 Formally, through participation in senate/council	48,9
Q50_2 Formally, through faculty/department level	39,4
Q50_3 By providing information on the issues involved	48,4
Q50_4 By supporting our students to attend national discussions	22,0
Q50_5 Other *(please specify: ….…………………………………….)*	2,9
Q50_6 Not applicable	18,3

Q50_5OTH Other ways for involving students in EHEA construction

		Frequency	Percent
0	No response	717	95,0
1	Supporting students to attend international discussions	3	0,4
2	Socrates Committee	1	0,1
3	Participation in specific steering committee	1	0,1
99	NA	17	2,3
Total		739	97,9
System		16	2,1
		755	100,0

8. Attractiveness of European Higher Education

Q51. Do you expect that the emerging European Higher Education Area (EHEA) will provide better opportunities for:

Q51_1. Students:

1.	All students at your institution	54,0
2.	Most outgoing students from your institution	20,7
3.	Most incoming students to your institution	4,3
4.	Mainly the more affluent students at your institution	9,7
5.	Non-European students considering higher education in your country	3,0
6.	None	1,6
NA		6,7

Q51_2. Higher education systems:

1.	All national systems of higher education that are part of the EHEA	40,8
2.	Mainly those systems most competitive on the European higher education market	18,8
3.	Mainly those systems most open to international cooperation	34,4
3.	None	1,1
NA		4,9

Q51_3. Higher education institutions:

1.	All institutions part of the EHEA	47,5
2.	Mainly the institutions most competitive on the European higher education market	31,5
3.	Mainly the most prestigious institutions	4,6
4.	Mainly transnational providers	4,1
5.	Mainly postgraduate institutions	2,7
6.	Mainly institutions within the larger countries in the EHEA	2,6
7.	None	1,1
NA		5,9

Q52. Does your institution systematically track the employment of graduates?

1.	No, there is no system	25,7
2.	Yes, we track some graduates	40,3
3.	Yes, we track the employment of all recent graduates	30,2
NA		3,8

Q53. In your opinion, will the envisaged EHEA bring added value to the degrees / diplomas awarded by your institution?

1.	Yes, definitely	36,4
2.	Probably yes	37,4
3.	Difficult to say at this stage	22,7
NA		3,6

Q54. At which level will this added value be most enhanced?

1.	Regional	2,7
2.	National	12,1
3.	European-level	47,0
4.	International	29,3
5.	None	1,6
NA		7,4

Q55. In which geographical areas would your institution most like to enhance its international attractiveness? *(several answers possible; please fill in "*" for each selected choice)*

Q55_1 EU	91,8
Q55_2 Eastern Europe	62,0
Q55_3 US /Canada	57,0
Q55_4 Australia	22,7
Q55_5 Arab World	15,9
Q55_6 Asia	39,8
Q55_7 Latin America	31,6
Q55_8 Africa	24,2
Q55_9 None	0,0

Q56. Which instruments (incentives or other measures) are used to pursue these priorities? *(several answers possible; please fill in "*" for each selected choice)*

Q56_1 Offer scholarships to students coming from abroad	33,0
Q56_2 Apply targeted marketing techniques for student recruitment	30,2
Q56_3 Establish inter-institutional partnerships/collaborative arrangements/branch campuses in other countries	57,2
Q56_4 Develop joint programmes or similar cooperation activities	69,9
Q56_5 Offer study places from students coming from priority areas	34,1
Q56_6 Offer new programs taught in English or in another major European language	53,9
Q56_7 Send our students there for limited periods of study	66,7
Q56_8 Other *(please specify: …………………………………………)*	1,9

Q57. Is your institutional leadership aware of the present GATS discussions concerning Higher Education?

1.	Yes, fully aware	19,3
2.	Yes, but without specific details	45,9
3.	Not yet	29,3
NA		5,5

COMMENTS

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

………………………………………………………………………………………….......................……
………………………………………………………………………………………….......................……
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…………………………………………………………………………………………........................

End of Questionnaire

THANK YOU VERY MUCH FOR YOUR TIME. PLEASE RETURN THIS QUESTIONNAIRE BY EMAIL TO **trends3@eua.be** BY 27 NOVEMBER 2002

ANNEX 2 – RESPONSES TO TRENDS 2003 QUESTIONNAIRES, BY COUNTRY AND TARGET GROUP

	University	Other HEI	Rectors' Conference	National Association other HEI	Ministry	Student Association	Employers' Organisation	Total
Albania	2				1	1		4
Andorra	1							1
Armenia	1							1
Austria	12	20	1	1	1	1		36
Belgium	8	20	2		2	2		34
Bosnia-Herzegovina	4		1		1	1		7
Bulgaria	11	2	1		1	2		17
Croatia	4	2	1		1	2	1	11
Cyprus	1	4			1		1	7
Czech Republic	17	12	1		1	1		32
Denmark	10	36	1		1			48
Estonia	4	3	1		1	1	1	11
Finland	15	12	1		1	1	1	31
France	27	52	1	2	1			83
Germany	20	39	1		1	1	1	63
Greece	11	9	1		1		1	23
Hungary	21	18	1		1	1	1	43
Iceland	1	1	1		1	1		5
Ireland	7	9	1	1	1		1	20
Italy	25	5	1		1	2		34
Latvia	4	26	1		1	1		33
Lichtenstein					1			1
Lithuania	2	14	1		1	1	1	20
Luxemburg	1	1					1	3
Macedonia	3				1	1		5
Malta	1				1		1	3
Netherlands	5	10		1	1	2	1	20
Norway	5	24	1		1	1	1	33
Poland	23	14	1		1	1		40
Portugal	11	24	1		1	1		38
Romania	15				1	1		17
Russia	1							1
Serbia & Montenegro	7		1		2	1		11
Slovakia	8		1		1	1	1	12
Slovenia	1	3	1		1	1	1	8
Spain	26	1	1		1			29
Sweden	13	2	1		1	1	1	19
Switzerland	10	4	1	1	1	1		18
Turkey	18	1			1			20
Ukraine	2							2
United Kingdom	36	9	1	1	1	2	1	51
European associations						6		6
Total	394	377	29	7	38	39	17	901

ANNEX 3 – OVERVIEW OF THE HIGHER EDUCATION SYSTEM IN TURKEY

The studies prepared for the Conferences of Bologna and Prague, *Trends I* and *Trends II*, contained country-specific information on the HE systems of all the "Bologna" signatory States. The only exception was Turkey which joined the Process in 2001 at the Prague Conference. Therefore this overview of the higher education system in Turkey, following the structure of the country portraits in *Trends I* and *II*, is included as an Annex to the *Trends report* in 2003.

Overall structure

The Turkish higher education system consists at present of 53 state universities, including two state higher institutes of technology, and 23 private/foundation universities. It is a unitary system, based only on university-type institutions. Higher technical and vocational studies are offered at two-year and four-year higher schools affiliated to the universities. The Turkish HE system is centralised, and all state and private universities are equal regarding the legal status and regulations. Foreign universities may not operate in Turkey, which excludes the provision of transnational education.

Degrees and qualifications

Higher education follows a two-tier model. At the sub-degree level the *On Lisans Diplomasi* (pre-licenciate or associate degree) is offered after two years of study.
A degree at Bachelor level, the *Lisans Diplomasi,* is awarded after a four-year programme in most disciplines, with the exception of dentistry and veterinary medicine (5 years) and medicine (6 years).
Master-level programmes may last either 3 semesters (without thesis) or 4 semesters (including a thesis) and lead to the *Yuksek Lisans Diplomasi*.
Doctoral studies are organised in doctoral programmes and last about 4 years.

Admission

Admission to all undergraduate programmes requires a secondary school leaving certificate (or equivalent) plus a sufficient score at the Student Selection Examination *(ÖSS)*. The *ÖSS* is administered centrally by the Student Selection and Placement Centre *(ÖSYM)* which is affiliated to the Council of Higher Education *(YÖK)*. For foreign students wishing to register for undergraduate studies in Turkey, there is a separate "entrance examination for foreign students" *(ÖSYM)*.

Credit systems and modules

All universities use a national credit system that resembles those of North America, i.e. it is based rather on contact hours than on student workload and serves primarily for credit accumulation rather than transfer.
Since Turkey is planning to participate in the EU mobility programmes as of the academic year 2004/05, a National Agency has been set up to prepare and manage these programmes. Part of the preparation is a stricter application of ECTS principles and most of the Turkish universities have already started to introduce ECTS.
The programmes in medicine, dentistry and veterinary science are organised in modules.

Structure of the academic year

The academic year is divided into two semesters of 16 weeks duration. The winter semester runs from the last week of September until mid-January, the summer semester from mid-February until mid-June.

Tuition fees and grants/loans

Students pay different levels of tuition fees, according to the type of programme/discipline and the type of university. The levels are fixed each year centrally by the Council of Higher Education

(YÖK). The share of the fees to be paid by the State is determined each year by the Council of Ministers and allocated to the budget of the universities. The minimum share paid by the State is 50%. Tuition fees for foreign students are three times higher than for national students. Private/foundation universities determine their tuition fees themselves.

There are national grants/loans schemes for Turkish students. There are specific scholarship programmes for study abroad at Master and Ph.D. level. In the framework of bilateral agreements, some scholarships are also available to foreign students for study in Turkey.

Quality assurance

All universities are state-founded. This implies institutional recognition. Equally, all new programmes have to be authorised traditionally by the *YÖK*. In 2003, however, new "Regulations on Academic Assessment and Quality Control in Higher Education" have been adopted by the Interuniversity Board. These provide for the evaluation of all degree programmes, starting with self-assessment. It is planned to transform these evaluation procedures into an accreditation system in the longer run.

ANNEX 4 – LIST OF BOLOGNA-RELATED EVENTS ATTENDED BY TRENDS 2003 AUTHORS DURING 2002-2003

2002

12-13 March	"Working on the European Dimension of Quality", Amsterdam
11-12 April	"From Lisbon to a European Higher Education Area: Recognition Issues in the Bologna Process", Lisbon
17-20 April	EUA General Assembly and Conference "Autonomy and Quality - the Challenge for Institutions", Roskilde
30-31 May	Seminar on Joint Degrees within the framework of the Bologna Process, Stockholm
24 June	EUA Bologna Promoters Group meeting, Geneva
4-6 July	ECTS National Coordinators and Counsellors annual meeting, Graz
11-12 September	EUA/EAIE Bologna Seminar, Porto
20 September	Launch of EUA Joint Masters pilot project, Brussels
11-12 October	"ECTS – The Challenge for Institutions and Students", Zürich

2003

3-5 February	"Quality Assessment and Accreditation in Higher Education", Madrid
19-20 February	Seminar on the Social Dimension of the Higher Education Area, Athens
21-23 February	ESIB European Student Convention, Athens
6-8 March	"The External Dimension of the Bologna Process. Southeastern European Higher Education and the European Higher Education Area in a Global World", Bucharest
14-15 March	Seminar on Master Degrees, Helsinki
27-28 March	Seminar on Qualification Structures in Higher Education in Europe, Copenhagen
10-11 April	"Bologna - A European space for talented young artists?", Vienna
10-13 April	"Shaping the European Area of Higher Education and Research", Berlin
28-29 April	"Accreditation and Quality Assurance in Higher Education", Berlin
9 May	Launch Conference of Tuning II, Brussels
11-17 May	"Smashing the Ivory Tower - Equal Access to Higher Education", Sofia
29-31 May	"Convention of European Higher Education Institutions", Graz
5-6 June	EURASHE 13th Annual Conference, Gyöngyös
5-7 June	"ECTS and ECTS compatible credit systems for Higher Education in the context of Lifelong Learning", Prague
12-14 June	Seminar on Student Participation in Governance in Higher Education, Oslo
29 June - 2 July	"Parity of Access across Europe? - Equity and Future Higher Education Development: EAN Contribution to the Bologna Process", Prague

WHAT IS EUA ? The European University Association, as the representative organisation of both European universities and national rectors' conferences, is the main voice of the higher education community in Europe. Its membership includes 655 individual members, 37 collective members and 11 affiliate members in 45 countries throughout Europe.

EUA's mission is to promote the development of a coherent system of European higher education and research, through active support and guidance to its members, to enhance their contributions to society and the quality of their core activities.

EUA focuses its policies and services to members on the creation of a European area for higher education and research. More specifically, EUA's objectives are to develop consensus on
- a European higher education and research identity based on shared values;
- the compatibility of European higher education structures through commonly accepted norms;
- convergence of the European higher education and research areas to strengthen further the sector's attractiveness in Europe and beyond.

QU'EST-CE QUE L'EUA ? Organisation représentant à la fois les universités européennes et les conférences nationales de recteurs, l'Association Européenne de l'Université est le principal porte-parole de la communauté de l'enseignement supérieur en Europe. 655 membres individuels, 37 membres collectifs et 11 membres affiliés dans 45 pays d'Europe en constituent les forces vives.

L'EUA a pour mission de favoriser la mise en place d'un système cohérent d'enseignement supérieur et de recherche en Europe en orientant ses membres vers une amélioration de la qualité de leurs activités fondamentales, soutenant ainsi activement leur apport à la société.

L'EUA articule sa politique et ses services autour de la construction d'un espace européen de l'enseignement supérieur et de la recherche. Plus spécifiquement, elle vise à rassembler ses membres sur:
- une identité européenne de l'enseignement supérieur et de la recherche qui se fonde sur des valeurs partagées;
- la compatibilité des structures de l'enseignement supérieur européen à travers des normes acceptées en commun;
- la convergence en un espace européen des systèmes d'enseignement supérieur et de recherche pour renforcer l'attrait des institutions en Europe et dans le reste du monde.