

EUA PUBLICATIONS 2015



Trends 2015: Learning and Teaching in European Universities

BY ANDRÉE SURSOCK

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FOREWORD

Over the past 15 years, major reforms have been undertaken across Europe as part of the Bologna Process. While the implementation of these reforms is not yet entirely completed, increasingly the key question refers to how they are actually achieving their goal of enhancing the quality of learning and teaching and its relevance to learners and society. Much more so than in the past, and depending on the country and the institution, the success, or otherwise, of the Bologna reforms in improving the quality of learning and teaching is debated against a backdrop of demographic change, and a consensus on the need to improve accessibility and inclusion. At the same time, improved quality appears to be increasingly linked to digitalisation, internationalisation, research and innovation capacity and, to varying degrees, the impact of the economic and financial crisis.

This implies an increased scrutiny not only on whether and how student-centred learning has been implemented and curricula revised, but also on the role and situation of teaching staff and institutional frameworks in general, and particularly in their ability to stimulate and support innovation in learning and teaching.

These questions have been at the heart of the present *Trends 2015* report. The report documents how developments in learning and teaching are perceived by the 451 institutions across the European Higher Education Area (EHEA) that responded to the questionnaire while also taking account of a number of external factors that have driven change in recent years. In this regard, as for previous Trends reports, it complements the reports produced by the Bologna Follow-up Group, as well as other more in-depth and thematically focused studies undertaken.

We hope that this report will contribute to the European debate on the future of the EHEA, and will be useful as a benchmarking tool to higher education institutions, their staff and their students.

Maria Helena Nazaré
President, EUA

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EUA is deeply grateful to the 451 higher education institutions that replied to the Trends 2015 questionnaire. Responding to a 25-page questionnaire is not a meagre task, particularly when it requires consulting other colleagues within the institutions to ensure accuracy. Special thanks are due to the 263 higher education institutions, which had responded to the *Trends 2010* questionnaire and responded again to this survey. Their unwavering support gave us confidence in the longitudinal analysis of some of the data.

We are also grateful to National Rectors' Conferences and other associations that provided feedback and supported us in several ways, for example, by distributing the questionnaire.

A small group was responsible for brainstorming and designing the questionnaire as well as serving as a sounding board to the author for no less than a year. This group included Howard Davies, Michael Gaebel, Liviu Matei, Hanne Smidt and Lesley Wilson. Their reading suggestions, insights in analysing the data and cogent comments on various drafts of this report contributed significantly to sharpening the argumentation. The contribution of Michael Gaebel and Lesley Wilson to the final draft of this report was deeply appreciated. In addition to being part of this small group, Henriette Stoeber compiled the data, provided the longitudinal analysis and ensured the accuracy of the narrative. Her contribution and support were invaluable.

Many other colleagues, from EUA and elsewhere, were put to contribution on specific points requiring their expertise. Enora Benettot-Pruvot, Alexandra Bitusikova, Lidia Borrell-Damian, Elizabeth Colucci, Thomas Estermann, Madalena Fonseca, Ellen Hazelkorn, Thomas Jorgensen, Tia Loukkola and Pedro Teixeira responded to questions and requests in an unfailing manner. Our thanks goes to them for their commitment to the Trends series.

Andrée Sursock

Senior Advisor, EUA

EXECUTIVE SUMMARY

Introduction: Learning and teaching – the focus of *Trends 2015*

1. *Trends 2015* is the seventh in the series of Trends reports published by the European University Association. The main goal of *Trends 2015* is to document the universities' perceptions of the changes that have taken place in European higher education in the past five years particularly in relation to learning and teaching. It is based on a questionnaire to which 451 higher education institutions, from 46 countries (or 48 higher education systems¹), responded.

The respondents represent more than 10 million students or about a quarter of the students enrolled in the institutions of the European Higher Education Area.

2. Specifically, *Trends 2015* seeks to answer the following questions:
 - To what extent have learning and teaching moved up as institutional priorities? How extensive has the shift been to student-centred learning across Europe and is this shift supported by national and institutional policies and other measures (e.g. funding, staff development, internal and external quality assurance procedures)?
 - What are the key changes that have affected institutional developments, particularly in relation to learning and teaching?
 - How can the findings of this study inform the future priorities of the Bologna Process?
3. *Trends 2015* takes as its point of departure the results of the last Trends report in 2010: It described the 1999-2009 decade as a turbulent one, characterised by a significant set of national policy changes. These changes, for which there was a broad consensus across Europe, affected, among other things the scope of institutional autonomy, funding, and quality assurance. To a large extent, institutional leadership embraced these changes at the same time as important reforms linked to learning and teaching, particularly the Bologna three-cycle degree structure, ECTS, and the diploma supplement were being implemented, in order to develop greater flexibility of learning paths. Thus, the first decade of the 21st century saw major reforms that felt overwhelming at times but nevertheless reflected a sense of shared destiny across the continent as institutions, students and representatives of the Bologna Declaration signatories focused on the launch of the European Higher Education Area (EHEA) in 2010.

Part I: The changed context

4. By comparison, the years since Trends 2010 have been less hopeful. Negative demographic trends and the financial and economic crises have had a profound effect on many higher education systems. The deepening economic crisis has had a negative impact on the newly gained institutional autonomy and on institutional budgets, particularly in the southern, eastern and central parts of Europe.

The weak economic outlook for Europe as a whole and the increase in youth unemployment in many parts of Europe have prompted many governments, the European Commission and the OECD to emphasise the necessity for higher education to respond to economic and social needs, enhance the employability of graduates, including via a stronger focus on entrepreneurship and innovation and on strengthening university-business partnerships.

5. The Trends 2015 questionnaire results show that universities have responded to these challenges. In the area of learning and teaching, there is evidence of many initiatives to increase and widen participation, provide students with opportunities to develop transferable skills through community engagement and to include external stakeholders in core institutional activities.

These changes are taking place in the context of broader developments in ICT, the growing strategic importance of internationalisation, and the greater attention being paid to rankings and institutional positioning in general.

Part II: Dynamic European and national policy agendas

6. Given these external challenges, *Trends 2015* explores the extent to which shared policy agendas have still been able to determine or at least influence the direction and pace of reforms in the EHEA at national and institutional level in the last few years.

The Bologna Process has emphasised several policy objectives in the past fifteen years and the longitudinal Trends data shows that quality assurance has been a particularly important change driver during this period. Moreover, the development of internal quality assurance processes has been particularly remarkable. External quality assurance is changing to take into account these developments. It is shifting toward institutional audits and evaluations that are mission-driven and enhancement-led at the same time as quality assurance agencies emphasise the involvement of students and a dialogue with all stakeholders. Significantly, the E4 Group, which includes student representatives, the higher education institutions and the quality assurance agencies, has played an important role in these changes.

7. The perception of the EHEA has improved across Europe during the past five years. However, *Trends 2015* also shows that commitment can disappear quickly and positive trends can be reversed by policies that are not fully embraced by the institutions. Thus Trends responses reveal progress but also gaps between the EHEA policy objectives and institutional realities in four key areas:

- National qualifications frameworks may have fallen short of broadly engaging the academic community, although responses from institutional leadership in a number of countries indicate a far higher awareness and use than is commonly assumed.

- Similarly, joint programmes have been the focus of attention of the Bologna Follow-Up Group that made a proposal to simplify their quality assurance. This is welcome, but the survey results indicated that the universities are more concerned about anchoring these programmes institutionally and making them sustainable, than about the external QA requirements.
 - The results of the 2015 Trends questionnaire concerning credit recognition show that the institutions are doing their best to ensure a fair process but that this issue remains an enduring obstacle to mobility. It remains to be seen whether the recent policy responses, in particular the ESG-Part I which reinforces the institutions' responsibilities in this respect and the work of the Pathfinder Group on Automatic Recognition, which remind all stakeholders of agreed recognition principles, will help to improve the situation.
 - Cross-border external quality assurance activities are increasing and are a manifestation of both the quality assurance agencies' and the universities' international aspirations and their wish to be evaluated in different ways. As compared to the other issues mentioned above, quality assurance shows that the actors (institutions and agencies) are ahead of the policy makers as indicated by the lack of progress in legal frameworks allowing institutions to choose any quality assurance agency that is listed in EQAR since the Bucharest Communiqué in 2012.
8. The national policy agenda has remained very active since the turn of the 21st century but with far greater differences across countries than was the case 10 years ago. At that time the Bologna Process was still the trajectory for large systemic transformation and the European Commission had a strong voice in promoting "the modernisation agenda of universities".
 9. Not surprisingly, the most frequent national reform today is about funding. The financial and economic crises have had a profound effect on many higher education systems, including those least affected economically. Universities in many countries were given more autonomy during the first decade of the 21st century. Although the scope of autonomy is respected, less funding and additional reporting requirements often increase the importance of institutional bureaucracies, limit the capacity of institutions to chart their own course and erode collegial decision-making.

With budgets being tight, governments are finding new ways of distributing their limited funding, such as targeted and performance funding or 'excellence initiatives', and there is pressure on institutions to do more with less, and diversify their funding sources. In the crucial area of funding and funding instruments, which is not addressed in the Bologna Process, there appear to be few shared policies on the European level. This has the potential of further increasing disparity within Europe.

Part III: Institutional strategies and the changing student population

10. The new economic reality – the economic crisis, youth unemployment, the requirements of the knowledge society, globalisation – has led to renewed emphasis on increasing student enrolments at the European and national levels. Although changes to the student body show significant national differences, 42% of the institutions that responded to the Trends questionnaire report an increased participation of more than 10%. Increased enrolments

are reported for all three cycles. Where drops in enrolments occur, they are attributed to demographic change and the students' financial situation, especially in eastern and southern Europe.

Institutions also report a marked shift towards professional education. This may be linked to greater policy emphasis on, and students' anxiety about, employment prospects. There is evidence to suggest that this shift may be leading to the closure of departments in the sciences and the humanities; this is being monitored in particular in France, Germany and the United Kingdom.

- 11.** In addition, the composition of the student body is changing as a result of specific institutional strategies, and in particular due to the major efforts undertaken to recruit international students from both EU and non-EU countries.

Institutional outreach strategies also aim at increasing diversity, such as recruiting mature students, students with disabilities or from disadvantaged groups, ethnic minorities, and students without standard entry requirements. It is clear, however, that this is an area that requires further attention, particularly in adapting lifelong learning opportunities to the specific demographic and economic situation in each country.

Part IV: Learning and teaching in Europe

The pre-eminence of internationalisation and ICT

- 12.** The Trends 2015 results confirm the pre-eminence of both internationalisation and ICT in the development and improvement of learning and teaching. Their importance is expected to grow further. The answers suggest that the quality of learning and teaching has improved thanks to student and staff mobility while ICT developments are expected to contribute to increasing the flexibility of access to the learning provisions and the effectiveness of classroom time.

Trends results appear to show little disparity in the European Higher Education Area concerning the ICT tools in place but there are differences within higher education institutions in respect of specific teaching innovations (whether ICT-supported or not), which tend to be piloted at the level of departments and faculties. It is unclear if the decentralised way in which innovations are being introduced is due to lack of central steering or is deliberately intended to pilot them first on a small scale.

Changing conceptions of teaching

- 13.** Introducing new ways of teaching is important to 57% of the institutions and slightly more than half of the institutions take into account advances in research and the views of employers and professional associations, as appropriate, when revising their curricula.

The implementation of learning outcomes has continued to progress since 2010. Institutions are generally positive about the benefits of learning outcomes, albeit not in all countries. It is clear, however, that in many institutions their implementation appears to have taken place without changing in radical ways how curricula, including examinations, are developed. Therefore this area is still a work in progress.

Staff policies

- 14.** Nearly 60% of institutions report a growing recognition of the importance of teaching. This is translated into staff policies focusing on international recruitment, academic experience gained in another institution and, more generally, internationalising staff through staff mobility.

The quality of teaching is supported by quality assurance processes, including student evaluations, and by the work of academic development units. While these are positive results, it should be noted that there is an over-reliance on the student questionnaire as the sole method for evaluating teaching performance, instead of combining this with other instruments.

Changes in the learning environment

- 15.** Changes in the learning environment, such as improving equipment, libraries and learning centres and creating common rooms for students and staff as well as centres for learning and teaching, seem fairly common although it is difficult to evaluate the scope of these changes based on the Trends questionnaire.

- 16.** A variety of activities developed by institutions confirm the existence of targeted institutional strategies to support a diverse student body, whether it is through academic orientation and advice or bridging courses to bring secondary school leavers up to the level of introductory course work in higher education. A range of different support services and pastoral care are available to support students during their time at university. While most institutions report dropout rates to have remained roughly stable since 2010, those offering the broadest range of student support services report a decrease.

Three-quarters of institutions report offering career guidance services to students before graduation. After graduation, the same proportion of institutions sustain alumni involvement in the university.

- 17.** Student involvement in governance is prevalent almost everywhere (albeit more at faculty than at central level) and many institutions provide support for student-led activities and volunteer engagement in the local community.

The use of student and graduate surveys is growing and is becoming increasingly sophisticated. A growing number of institutions are developing a range of instruments to track their students during and after their studies. The results of these surveys are used to improve the educational offer and institutions' responses to students' needs.

The Trends data show that all these positive developments are not that common everywhere.

Part V: Universities in the next decade

Looking to the future, the report focuses on the four following clusters of issues:

18. *Maintaining the momentum: the importance of learning and teaching*

While learning and teaching in European universities has been changing in positive ways, the following issues should be addressed in the future:

- Lifelong access to learning for a diverse student body is pivotal. Achieving this goal requires working across all educational levels to ensure a good transition into higher education, offering students a full array of student support services, stressing their engagement via their involvement in governance, volunteer activities in the community, etc., and developing alumni services, including lifelong learning opportunities.
- Student-centred learning and preparation of graduates for the labour market and society will continue to be policy objectives. Comparative research would be useful in assisting policy-making and institutions in this area. It would be important to examine, for instance, whether and how learning-outcome approaches take into account both the diversity of learning styles and the extensive mix of skills that are required to function in complex environments; and how the development of transversal skills is incorporated into intended and achieved learning outcomes and translated into learning activities.
- Development and implementation of effective internationalisation strategies are of strong interest to universities. It requires them to consider the benefits, consequences and risks of different approaches, including the costs involved and sustainability prospects and to reflect on the proper balance between cooperation and competition with other universities. The positive and negative impacts of specific national strategies for internationalisation of higher education also need to be taken into consideration, particularly when these are defined narrowly as national instruments of economic competitiveness or political diplomacy.

19. *Organisational structures and human resources*

In creating environments that support improvements in teaching and learning, it is essential to ensure that the university organisational structure is fit for purpose. This may require reviewing the number and size of units (faculties, departments, institutes) to ensure, for example, that they facilitate interdisciplinarity, as well as the balance between centralised management and more devolved responsibilities in order to ensure shared institutional quality frameworks and standards while enabling and supporting diversity and innovation across the institution.

Furthermore, in the context of technological developments universities should consider how to link (digital) libraries, centres for learning and teaching and overall data management facilities that collect and analyse data. Staffing levels and profiles may need to be reassessed, in particular the availability of senior positions to coordinate and manage newly defined responsibilities.

Attention should also be paid to both academic and administrative staff. Thus, academic staff development is pivotal to ensure faculty engagement in changes to learning and teaching. Moreover, professional institutional management is associated in many systems

with the growth in the number of administrative staff who hold postgraduate degrees and are recruited to senior posts that directly support academic or high-level administrative functions (QA, international office, research coordination, data collection and management, financial planning and risk assessment, etc.). Attention to these staffing issues is not equally shared across Europe and will require monitoring and further studies.

20. *The growth of marketisation in higher education*

In recent years, the dividing line between public and private is becoming more blurred as a result of several developments such as cuts in public funding and the growth of private contributions (e.g. fees levied for lifelong learning programmes, differentiated tuition levels for non-EU international students and greater private industry funding for research and innovation).

More visible forms of marketisation include the acquisition of vulnerable public and private higher education institutions by for-profit companies; and the recent growth in the number of online providers, which is likely to open up a broader range of opportunities for collaboration with private companies and non-commercial entities.

It would be important to track the visible and less visible forms of marketisation and the impact that private funding may have on institutional mission, academic principles and values and the balances between public funding and returns on investment. Similarly, it would be worth monitoring where and how this is happening, and particularly if there is a difference in the way different sub-regions of Europe address these issues and with what impact and consequences.

21. *A common European agenda*

Given the ongoing globalisation of higher education and research and the importance attached to internationalisation, further consolidating the EHEA and enhancing its international visibility are of strategic importance.

The results of the *Trends 2015* report suggest that in comparison to previous years, national policy making has been particularly important in determining action while Europe-wide policy initiatives may be more difficult to define and transfer than it was the case in the past. The fact that Europe faces considerable challenges is certainly one of the reasons but it also stresses the urgency of joint European approaches.

Given the changed circumstances and the major challenges facing Europe and European higher education documented in the report it is to be hoped that the European Commission and the Bologna Process will continue to take action and enhance working in partnership with stakeholders to tackle these challenges and to further the construction of Europe and the EHEA.

INTRODUCTION: AIMS AND METHODOLOGY

Trends 2015 is the seventh in the series of Trends reports published by the European University Association (or its predecessor organisations) since the signing of the Bologna Declaration in 1999.²

By providing the perspective of the higher education institutions on changes in the sector, the Trends reports lay the groundwork for an informed discussion with policy makers and contribute to the policy discussions during the Bologna ministerial meetings. It also provides a benchmarking opportunity for higher education institutions.

Focus and aims of Trends 2015

The particular focus of *Trends 2015* is on how European higher education institutions have adapted their learning and teaching to the Bologna reforms and to other contextual change drivers. These include national and European policies as well as wider socio-economic and demographic trends, which have affected institutional strategies and activities in the past five years.

The main questions that the report seeks to address are:

- To what extent have learning and teaching moved up as institutional priorities? How extensive has the shift been to student-centred learning across Europe and is this shift supported by national and institutional policies and other measures (e.g. funding, staff development, internal and external quality assurance procedures)?
- What are the key changes that have affected institutional developments, particularly in relation to learning and teaching?
- How can the findings of this study inform the future priorities of the Bologna Process?

Thus, the main goal of *Trends 2015* is to document and analyse the changes that have taken place in European higher education in the past five years, particularly in relation to learning and teaching. These have been part of a broader set of changes that have affected European higher education institutions since 2010, the date of the last Trends report.

² EUA was established in 2001 as a result of a merger between the Association of European Universities (CRE) and the Confederation of European Union Rectors' Conferences. For further information about past Trends reports, cf. <http://www.eua.be/eua-work-and-policy-area/building-the-european-higher-education-area/trends-in-european-higher-education/past-trends-reports.aspx>

The changing landscape since 2010

The *Trends 2010* report described the 1999-2009 decade as turbulent, characterised by a significant set of national policy changes that bolstered the capacity of senior leadership teams to shape the future of their institutions. Among other changes, these included policy reforms that enlarged institutional autonomy and introduced new funding models.

Institutions embraced these changes at the same time as they implemented important reforms linked to learning and teaching, particularly the Bologna three-cycle degree structure, the European credit and transfer system (ECTS), and the diploma supplement in order to develop greater flexibility of learning paths.

The situation was often less clearly positive for the academic and administrative staff who were left with the critical task of implementing a diverse change agenda in a context where collegial decision-making was weakened by the development of managerial processes and greater external and internal accountability requirements.

These were indeed turbulent times but, with hindsight, the first decade of the 21st century was also forward-looking and optimistic, at least with regard to institutional leadership. A sense of shared destiny was strong across the continent as institutions, students and ministries of the Bologna Declaration signatories were focused on the launch of the European Higher Education Area (EHEA) in 2010.

This is why, in describing this intense period of reforms, *Trends 2010* spoke about the brave new world of higher education. By comparison, the years since *Trends 2010* have been less hopeful, and even sombre, for many higher education institutions. They have been dominated by a deepening economic crisis that has had an impact on the newly gained institutional autonomy and on institutional budgets. Accountability requirements have become intrusive in some countries. Demographic issues have also started to loom larger in many parts of Europe.

There are also bright spots, however, to name but three:

- The focus on learning and teaching has gained momentum and become a priority for institutions, including for the universities that are the most research-active.
- Institutions have reached out to a more diverse student body at the same time as they have become more international.
- The development of technology-assisted learning has opened up opportunities for different learning experiences and more flexibility to address the needs of a diversified student population.

The Trends 2015 questionnaire

Trends 2015 is based on a survey questionnaire (cf. Appendix 1), of which some of the questions had already been asked in previous Trends questionnaires (*Trends III*, *Trends IV* and *Trends 2010*) but the bulk of questions are new. They address specifically learning and teaching, including e-learning, the student lifecycle and the role of academic staff. Where appropriate, the report identifies findings based on the longitudinal data or refers to reports and studies conducted by EUA and other organisations.

The questionnaire was sent to all 767 EUA individual institutional members. The 33 National Rectors' Conferences that are EUA members were asked to distribute it more widely. It was also sent to other associations and networks for the same purpose. The response rate of the EUA member institutions was 49%. An additional 75 institutions that are not affiliated to EUA responded to the questionnaire. In total, 451 institutions from 46 countries (or 48 higher education systems) responded to the survey.

The characteristics of the sample

The institutions that responded to the questionnaire represent around 10 million students, which is more than half of the 17 million students studying at EUA member institutions, or about a quarter of the student body enrolled in the institutions of the European Higher Education Area. However, this percentage rises to 38% of the student population if Azerbaijan, Belarus, Ukraine and the Russian Federation are excluded from the sample due to their low response rates (the institutions that responded represented about 10% of the students in each of these countries).³

The report often refers to specific countries in order to illustrate how trends spread across Europe. Twenty-two countries are not included in such an analysis because fewer than five responses per country were received. Twenty-six countries have been taken into account when displaying such data, including Ukraine and the Russian Federation. However, because the total number of institutions that responded from these countries is relatively small compared to the size of the systems, and therefore are not totally representative, their data are given as information only, without interpretation or analysis. Information on the country distribution of respondents can be found in Appendix 2.

In addition, the responses from the Flemish and French communities of Belgium are combined (four institutions for each community) as are the 15 responses received from the United Kingdom, which included three from Scotland. The answers from Scotland are treated separately for questions that are related, either directly or indirectly, to funding. This separate analysis is specified when it occurs.

The institutions that responded could be divided roughly into four categories based on the size of their student enrolments:⁴

- 23% enrolled fewer than 7 500 students;
- 24% enrolled between 7 500 and 15 000 students;
- 22% enrolled between 15 000 and 24 999 students;
- 25% enrolled over 25 000 students.

The years in which the institutions were established ranged from 1088 to 2012, with the majority (311 institutions) created between 1910 and 2010. Thus, this is a sample of relatively young institutions, but one that reflects the general situation in Europe.⁵

³ These figures are based on Eurostat, UNESCO and EACEA databases.

⁴ 6% of respondents did not provide information on their student enrolment.

⁵ This is mirrored in other, larger samples such as the data collected by Bonaccorsi *et al.* (2010) for the EUMIDA project.

The majority of institutions are public (92%), 7% are private not-for-profit and 1% are private for-profit. The private institutions are mostly specialised colleges.

Among the 451 institutions that responded, 263 (or 58%) had responded to the *Trends 2010* questionnaire.

The bulk (91%) of institutions that responded to the questionnaire award doctorates and a further 2% offer doctorates in cooperation with other higher education institutions.

The institutions were asked to define their profiles. The majority (90%) define themselves as “both teaching oriented and research based”. A much smaller subset of institutions define themselves as either primarily teaching- or primarily research-oriented (respectively 6% and 3%).

Furthermore, the respondents could be categorised as follows:

- Multidisciplinary universities: 280 or 62%
- Specialised universities: 74 or 16%
- Technical universities: 48 or 11%
- Universities of applied sciences: 36 or 8%
- Specialised colleges: 8 or 2%
- Open universities: 5 or 1%

Thus, the specific characteristics of the sample require careful interpretation, not only as the basis for the description of the current situation but also for the national and longitudinal interpretation of results.

In addition, this report relies on a survey questionnaire with all the limitations that this methodological approach entails, particularly when it is administered in such a large number of countries. Furthermore, because the questionnaire covered a wide range of topics, institutions were advised to circulate it internally in order to ensure accurate responses but the extent to which this was done is not known. The three most senior positions of those who signed the responses were: vice-rectors or equivalent (25%), directors of international offices (13%) and rectors or equivalent (11%).

Structure of the report

This report is structured into five parts:

- Part I addresses broad contextual changes such as the economic crisis, demographic trends and the intensification of globalisation, which is supported by information and communication technology that allow institutions to reach across the globe and forge different types of international partnerships.
- Part II is focused on higher education and research policies. It starts with a discussion of the European Higher Education Area (EHEA), including the European quality assurance

framework, issues of credit recognition and joint degrees. It then proceeds to discuss European Union and national policies and focuses on funding policies as the most recurrent reform in Europe. It reveals the increased fragmentation of policy making in Europe and the fragility of commitment to the EHEA.

- Part III examines the changing characteristics of the student body and the extent to which it is the result of targeted institutional strategies. Indeed, providing better access to higher education in a context of diminishing resources has been a pivotal policy goal of the past five years.
- Part IV focuses specifically on learning and teaching. It explores how institutions support student progress through changes in teaching approaches and to the learning environment, academic staff policies, and the promotion of student engagement. Tracking students during their lifecycle contributes to monitoring their progress and supporting the widening participation agenda that many institutions have taken on board. Part IV concludes with examples of concrete initiatives that institutions could implement to improve learning and teaching.
- Part V ends the report with a proposal for a policy and a research agenda.

The main value of this report is to provide an overall picture of learning and teaching in Europe and associated institutional developments. It is a descriptive report whose goal is to present the current state of play in Europe on changes to the learning and teaching environment that have not previously been covered in any depth. The descriptive nature of the report should allow institutions to benchmark themselves and provide policy makers with information about institutional responses (policies, structures and instruments) to national and European reforms and international trends.

It shows that much has been accomplished by a large number of higher education institutions but that more studies are required to analyse the change and understand the obstacles and success factors of the important reform processes that have taken place as well as the underlying causes of national and institutional differences.

PART I:

The changed context

As a prelude to considering developments in teaching and learning since 2010, Part I describes the most significant changes that have had an impact on Europe and its universities since then. First and foremost, the impact of the financial crisis was only starting to be felt in some countries in 2010 while demographic changes were still a somewhat distant concern. Additional key trends include the intensification of global competition as demonstrated by the growing significance of rankings, the continuing importance of internationalisation, now supported by information and communication technologies (ICT).

The results of the Trends survey, complemented by additional contextual data, show that in all these areas higher education institutions are taking strategic action to respond to their changing environment.

1.1 The economic crisis and demographic trends

The past five years have been dominated by a prolonged economic crisis that has increased the deficits of countries, particularly in the south and in central and eastern parts of Europe. This has had direct consequences on university budgets.

Furthermore, demographic trends in some parts of Europe have been negative and their effects are starting to be felt by the higher education institutions in a number of countries. At the same time, growing illegal immigration towards Europe has led to discussions about immigration policies and about the role of the European Union in reaching out to its immediate neighbours.

1.1.1 The impact of the economic crisis on European higher education institutions

The most recent report of the EUA's Public Funding Observatory highlights the growing gap between the highest and lowest funded higher education systems in Europe. While there are notable exceptions, many countries in southern and eastern Europe still appear to be more affected by the crisis than those located in northern and western Europe. "This contrasting situation represents a challenge for Europe as a whole, whose global competitiveness is harmed by such imbalances and weaknesses in the European Higher Education and Research Areas" (EUA 2014c: 20). These findings were confirmed by the results of the Trends 2015 questionnaire.

The importance of the economic crisis according to Trends respondents:

- The economic crisis is rated as having been highly important for 43% of Trends respondents. This has been the case notably in the Czech Republic, France, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Portugal, Romania, Slovakia, Spain and Ukraine.
- By contrast, institutions in Norway and Sweden state that the economic crisis has had “low importance” while institutions in Germany and Switzerland are evenly split in assigning it medium or even low importance.
- It is noteworthy that the economic crisis is expected to remain important for the same percentage of respondents in the medium term.

The duration of the economic crisis is worrying even for the countries that have not been affected directly while it is jeopardising for the mid- and long-term future of some higher education systems. Some National Rectors’ Conferences indicate that universities are expected to supplement the shortfall in public funding with increased European funding from programmes such as Horizon 2020. At the same time, however, budget cuts also weaken their capacity to attract this type of competitive funding (EUA 2014c: 21).

The EUA Public Funding Observatory also emphasises that investment in university infrastructure has been a common target of recent budget cuts and that these might affect both the student experience and the staff’s working conditions in the long term. For the moment, the vast majority of Trends respondents reported some investment in the learning environment but their answers do not allow us to grasp the scale of this investment and whether funding is being rearranged to address the most pressing problems (cf. Section 4.6).

It is worth noting that many organisations have become concerned about the disparity across and within countries, as shown by the Bertelsmann Foundation’s comparison of the 28 European member states in areas such as poverty prevention, equitable education, access to the labour market, health, intergenerational justice and social cohesion and non-discrimination.⁶

Today’s economic systems are less reliant on industry. This had had a number of social consequences with respect to social equality not only across Europe but also within countries, with the labour force tending to polarise between low-skilled and highly-skilled workers. The OECD published a working paper by the Italian central banker Federico Cingano (2014) showing that social inequality within countries has been growing even in those that traditionally had little income disparities, such as Sweden and Norway. According to this study, the erosion of the middle class is a spreading phenomenon that hampers economic development.⁷

The weak economic outlook has been accompanied by an increase in youth unemployment in many parts of Europe: it peaked at 50% in Spain and 60% in Greece in 2014 and was estimated to have reached five million across the European Union in August 2014. This has prompted many governments, the European Commission and the OECD to emphasise the need for closer links between universities and industry, to stress innovation policies and graduate employability. In

⁶ Cf. Bertelsmann’s “EU Social Justice Index”:

<http://www.bertelsmann-stiftung.de/en/presse-startpunkt/press/press-releases/press-release/pid/social-imbalance-in-europe-is-increasing/>

⁷ Cf. OECD, Income Inequality undermines Growth: <http://www.oecd.org/forum/oecdyearbook/growth-and-inequality-close-relationship.htm>

response there is evidence that universities are indeed placing more focus on developing the practical and entrepreneurial skills of their students, and on promoting innovation and a broad range of stakeholder partnerships (EUA 2009).⁸

1.1.2 Demographic decline

Some of the countries that are hardest hit economically are experiencing significant departures of their graduates for greener pastures. According to Cécile Jolly (2015), the percentage of Europeans residing in another member state has been increasing by 4% each year since 2010. She attributes the increase to two types of flow: from the south to the north and, most notably, from the east to the west.⁹

Ageing populations and low birth rates affect many parts of Europe and weigh heavily on social security budgets, particularly in the countries of southern and central and eastern Europe.

According to the responses received to the Trends questionnaire, demographic trends have been:

- highly important to 32% of the responding institutions and particularly to institutions in the Czech Republic, Hungary, Latvia, Lithuania, Poland, Portugal, Romania, the Russian Federation, Slovakia and Ukraine;¹⁰
- moderately important to a further 41% of the responding institutions, particularly in Finland, Germany, Ireland, the Netherlands, Sweden, Switzerland, Turkey, Ukraine and the United Kingdom.

A comparison of these results with the Eurostat 2002-2013 data reveals that, in general, the perceptions of demographic change by the Trends respondents reflect the actual situation. It should be noted, however, that the Eurostat data are about demographic developments while the Trends responses are about the impact of demographic change on institutions. Unsurprisingly, therefore, the analysis of national responses to the Trends questionnaire shows that, within a given country, some institutions are more affected than others. In other words, the impact of demographic change depends upon an institution's specific situation regardless of how negative is the overall national demographic situation.

For instance, internal migration trends toward cities and away from rural regions – a worldwide trend – can introduce enrolment distortions across a country. Portugal is an illustration of this population shift. Fonseca, Encarnação and Justino explain that the shrinking higher education system "... leaves winners and losers. Polytechnics and, in particular, those located in peripheral regions, are the biggest losers, while the universities of the two major metropolitan areas, are the big winners." (Fonseca, Encarnação and Justino 2014: 143-144).

⁸ cf. The sustainability of university funding, financial management and full costing (EUIMA) project: <http://www.eua.be/euimafullcosting.aspx>

⁹ It should be noted, however, that the percentage of Europeans residing in another member state is smaller today than in 2004, the baseline for Jolly's study. Intra-European mobility grew by 20% yearly, starting in 2004; it decreased in 2008 and started to grow again but without reaching previous levels.

¹⁰ As mentioned earlier, the Russian and Ukrainian results are identified but not interpreted.

Among the Trends respondents, higher education institutions with small (fewer than 7 500 students) and medium size enrolments (7 500 to 15 000 students) were more likely to be affected by demographic change than those with more enrolments. This probably reflects the migration flow toward the cities where the larger universities tend to be located.

The Trends responses indicate, albeit tentatively, that private institutions were more likely to be harmed than public ones by demographic decline.¹¹ European countries, particularly in central and eastern Europe, may face a shrinking of their private higher education sector because of demographic trends.¹²

Marek Kwiek (2015) speaks of a shift “from privatisation to de-privatisation” and “re-publicisation” to describe a phenomenon that Poland and other post-communist European countries are experiencing. The private system expansion that started in 1989 in many countries is coming to an end.

In parallel to these projections, and in a large number of countries, Trends respondents anticipate that current demographic trends will worsen, although, in the medium term, some Trends respondents expect the demographic situation to stabilise (e.g. Finland and Sweden) or improve slightly (e.g. Lithuania and the Russian Federation) even if the issue will continue to remain very challenging. These results correspond, for the most part, to the projections based on the Eurostat 2002-2013 data.

It should be noted, however, that similar demographic trends could result in very different outcomes depending on the country. Based on the OECD data, Kwiek (2015) anticipates that “de-privatisation” will be limited to post-communist countries and will generally not occur in western Europe because of different dynamics between public and private funding sources and dissimilar historical trajectories.¹³

Although these issues are beyond the scope of *Trends 2015* it will be important to chart the twists and turns of privatisation in higher education, in part because these developments are insidious and occur in a variety of ways (e.g. outsourcing some functions such as e-learning to commercial players, hiring private agents to recruit international students,¹⁴ etc.).

1.1.3 The double impact of demography and economy

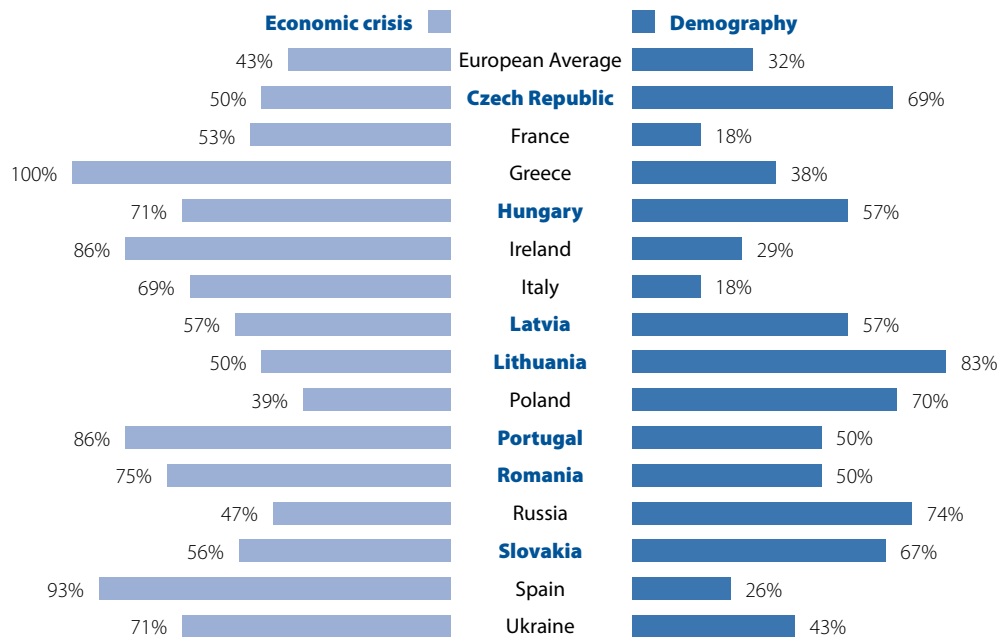
The combination of the economic crisis and demographic decline has affected institutions in a number of countries. Figure 1 highlights the countries where at least 50% of the institutions report being affected by both. With the exception of Portugal they are all located in central and eastern Europe and include most notably the Czech Republic, Hungary, Latvia, Lithuania, Romania, and Slovakia.

¹¹ Demographic change was highly important to 33% of the small institutions, to 41% of the medium-size institutions and to 60% of the private institutions. However, the number of private institutions in the Trends sample is too small to draw definite conclusions.

¹² To note, however, OECD's *Education at a Glance* shows an increase of enrolment in private institutions between 2003 and 2012 in a number of OECD countries where data are available (OECD 2014: 425).

¹³ There are exceptions to this generalisation. For instance, higher education expansion in Portugal followed the same pattern as in central and eastern Europe – albeit more than a decade earlier – after the democratic revolution in 1974. The system is now contracting, partially through “de-privatisation” to use Kwiek's words (Texeira 2012).

¹⁴ Chris Havergal (2015) obtained data from 106 UK universities that use such agents. He notes that they collectively spent £ 86.7 million in 2013-14. This corresponds to “a 16.5 per cent increase on the £ 74.4 million outlay two years earlier” and “is driven as much by rising commission rates as by expanding recruitment”.

Figure 1: High importance of economic crisis and demography (Q10)

1.2 Globalisation and institutional positioning

Post-industrialisation and the emergence of economies based on knowledge have put higher education at the centre of policy development in many parts of the world since at least the turn of the 21st century. The exacerbated global competition has found its translation into the international rankings of the world's "best" higher education institutions.

In response, the universities, which had always had international aspirations, have now developed more strategic approaches to this area. These developments are being supported by advances in communication and information technology (ICT). These trends are all interconnected, with complex feedback loops. Today, a good internationalisation strategy positions a university in the global knowledge production networks. It involves cooperation and competition strategies – both at the international and national levels – and savvy use of digital technologies. While in the past, institutions could be defined by their primary orientation (local, regional, national, European, international), today they tend to operate seamlessly on all levels.

The following sections consider issues of competition and cooperation as well as the institutions' strategic approaches to internationalisation and ICT, on the basis of the responses to the Trends questionnaire.

1.2.1 Competition and cooperation

Both the 2010 and 2015 Trends questionnaires sought to understand the significance of competition and cooperation in higher education and to track the importance of rankings and league tables for universities.

The longitudinal results show a great deal of stability regarding the importance of competition and cooperation, but institutions expect that this will grow in the mid-term. Thus:

- The same percentage of institutions in 2010 and in 2015 consider that “Enhanced cooperation with other higher education institutions” is highly important (53%).
- It is roughly the same for “competition with other higher education institutions”, which was considered to be highly important by 38% in 2010 and by 40% in 2015.
- While this shows stability over the 2000-2015 period, nearly the same percentage of *Trends 2015* respondents expect that both competition and cooperation will increase in the medium term (18% and 17% respectively), thus confirming the often-made observation that they are two sides of the same coin.

National and international ranking schemes are a manifestation of the growing competition in the sector. At the same time they contribute to organising and structuring cooperation in higher education. Their results are scrutinised by the universities and their stakeholders (national authorities, funders, students, etc.). They are used and misused for a variety of purposes, including some that are unintended (Rauhvargers 2013: 21-25).

The 2015 Trends responses show that the importance of ranking schemes and league tables is growing and that this trend is expected to continue. Thus, they are highly important to 33% of the institutions (+10% from 2010).

As an illustration of the twin importance of cooperation and collaboration, a recent EUA project called “Rankings in Institutional Practices and Strategies” (RISP) shows that ranking schemes and league tables are being used to support both cooperative and competitive institutional strategies (EUA 2014a: 36; cf. also EUA 2015).¹⁵ Thus:

- 56% of RISP respondents stated that rankings influence their choice of international partners.
- The vast majority of RISP respondents have set up processes and structures to monitor the results of rankings, assess their performance, benchmark with other institutions, and develop institutional strategies and activities, including marketing material. A growing number of institutions are setting up offices to collect institutional data (cf. Section 4.7) and professional communication offices to explain their mission, values and activities to the wider public (e.g. Dahan, Draelants, and Dumay 2014).

The 2015 Trends results show that institutions in Latvia, Romania, the Russian Federation, Spain, Turkey and the United Kingdom are most likely to respond, underlining that both competition and rankings are important.

¹⁵ A total of 171 institutions from 39 countries responded to the RISP survey; 90% of the institutions were included in a national or international ranking, or both.

Institutions were asked two questions about their institutional profile. When their responses are cross-tabulated with the issues of competition, collaboration and rankings, the results are as follows:

- The institutions claiming to operate primarily on the worldwide stage and in the European space are much more interested in rankings (42% and 49% respectively) than those serving their regional or national community (19% and 33% respectively).
- Both cooperation and competition are more important to those with a worldwide and European orientation than they are to the regional or nationally oriented institutions.
- Rankings are more important to the primarily research-focused institutions and those with both teaching and research orientation (33% and 34% respectively) than they are to the primarily teaching oriented institutions (20%).
- Primarily research-focused institutions are less interested in cooperation than the average (42% vs. 58% in the overall sample) and are, by far, the least worried about growing competition (25% vs. 40% overall).

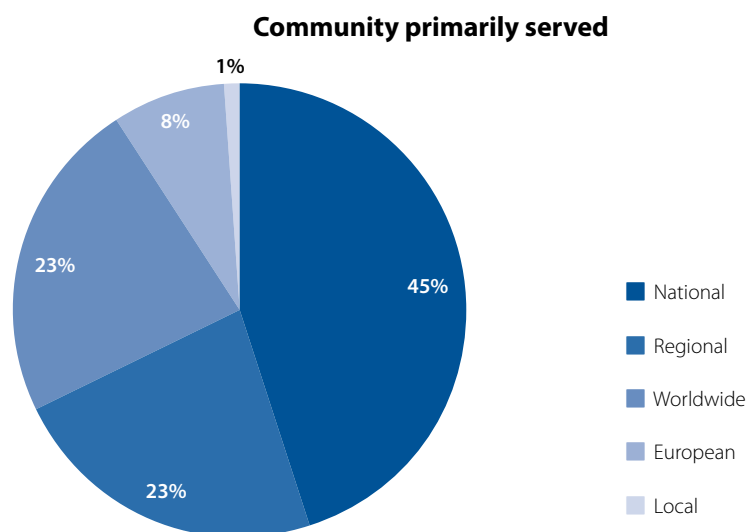
In the medium term, 13% more institutions expect rankings to be highly important and the number of respondents for whom these schemes have no importance is expected to shrink. In this regard, it is significant that the institutions that responded to the RISP survey – 90% of which are included in a ranking – noted that rankings are particularly important to international academic staff and to both international Master students and doctoral candidates (EUA 2014a: 33).

1.2.2 Internationalisation

Given the importance of internationalisation, the Trends 2015 questionnaire queried institutions about its importance in relation to 23 other developments. Internationalisation was rated as highly important by 69% of the Trends 2015 sample (+8% as compared to 2010) which identifies it as the second most important development after quality assurance.

Before discussing the strategic aspects of internationalisation, however, it is important to mention that more than two-thirds of the Trends 2015 respondents indicated that their primary community is national (45%) or regional (23%)¹⁶, while the remaining third considered that their primary community is European (8%) or worldwide (23%). (Less than 1% identified the local community as their primary one.)

¹⁶ In this context, regional does not refer to the European region but to a territorial or administrative subdivision within a country.

Figure 2: Which community do you see your institution primarily as serving? (Q4)

By comparison to *Trends 2010*, the 2015 sample includes more institutions that identify their primary community as being worldwide or European and fewer that indicate the regional or national community as their primary ones. These shifts are, however, statistically very small across the respondents. The largest one concerns the worldwide category (+ 8%).

A closer look at the countries showing the most significant shifts (Table 1) reveals that – with the exception of France, which is consolidating the regional level, partly as a mechanism for international positioning – the progression is from smaller to wider communities: that is, from the regional to the national; from the national to the European or the worldwide community.

Table 1: National shifts in the primary community of reference

Country	2010	2015
Austria	National	European and worldwide
France	National	Regional
Ireland	Regional	National
Netherlands	Regional and worldwide	Worldwide
Norway	Regional	Regional and national
Switzerland	National	European and worldwide

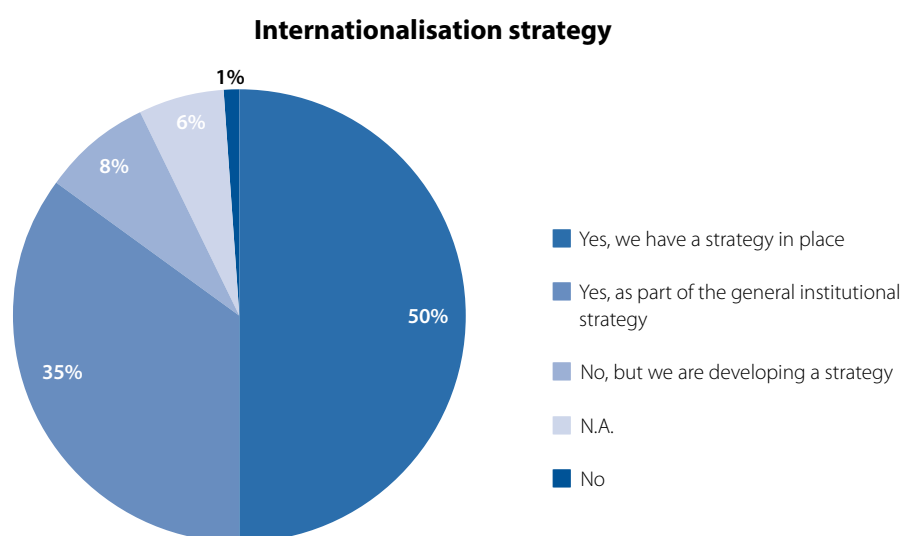
It will be important to monitor future trends and the extent to which universities switch their prime focus from the regional to the national, the European or the international – or indeed in the other direction, and the extent to which they widen (or narrow) their priority target areas or, indeed, combine them. There seems to be a growing realisation that in the age of globalisation and heightened international competition it is necessary to bolster a local or regional mission with international outreach, and that these categories may soon matter less as universities increasingly operate on multiple levels.

Internationalisation strategies

Internationalisation is rising in strategic importance and this trend is expected to continue (Figure 3). Thus, 93% of Trends respondents either have an internationalisation strategy (50%), intend to develop one (8%) or have included it as an element of the overall institutional strategy (35%).

These results are slightly lower than those received in response to the EUA internationalisation consultation, which found that 99% of institutions either have an internationalisation strategy in place (56%), intend to develop one (13%), or have considered internationalisation in other strategies (30%) (EUA, 2013a: 9).¹⁷

Figure 3: Does your institution have an internationalisation strategy? (Q45)



It is worth noting that the 2014 *IAU Global Survey* (2014: 47) confirms the growing importance of internationalisation policies and the lead taken by Europe in developing strategies (cf. also Green 2014).

Geographical targets

The Trends 2015 questionnaire queried institutions about their top three geographical targets. As Figure 4 shows, the first four priorities are the European Union (73%), Asia (48%), US/Canada (35%), and "Eastern Europe (non-EU)" (32%). China (21%) and Latin America (19%) are also important, although less so than the first four.

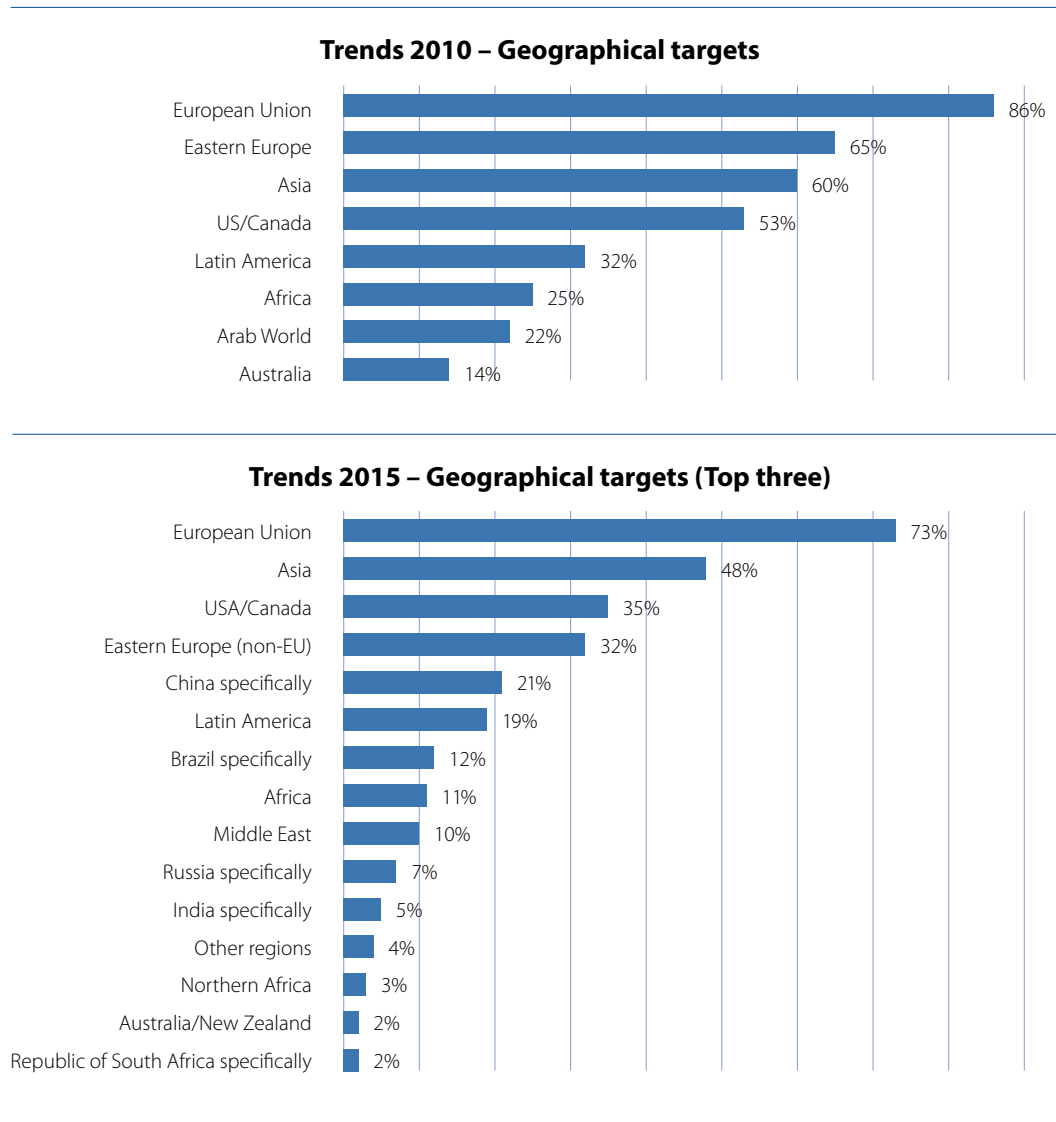
Are geographical targets changing in comparison to *Trends 2010*? For a variety of reasons the longitudinal analysis of the data can only be approximate.¹⁸ The analysis shows that, apart from Europe and Latin America, which maintained their importance, and Asia that gained in

¹⁷ 175 EUA members in 38 countries answered the consultation on internationalisation.

¹⁸ It was impossible to ask the same question as in 2010 because it would not have captured recent political developments. In addition, *Trends 2015* asked respondents to select up to three options only while *Trends 2010* allowed more options. The list of options was also different. For instance, *Trends 2010* listed Asia while *Trends 2015* listed both Asia and China; *Trends 2010* listed Latin America while *Trends 2015* listed both Latin America and Brazil.

importance, all other regions or countries lost some ground. However, if the results for Brazil, China and India are added to their respective regions, both Asia and Latin America show significant gains in comparison to 2010.

Figure 4: Geographical targets in 2010 (Q53) and in 2015 (Q46)



Furthermore, the Trends data show the following national patterns:

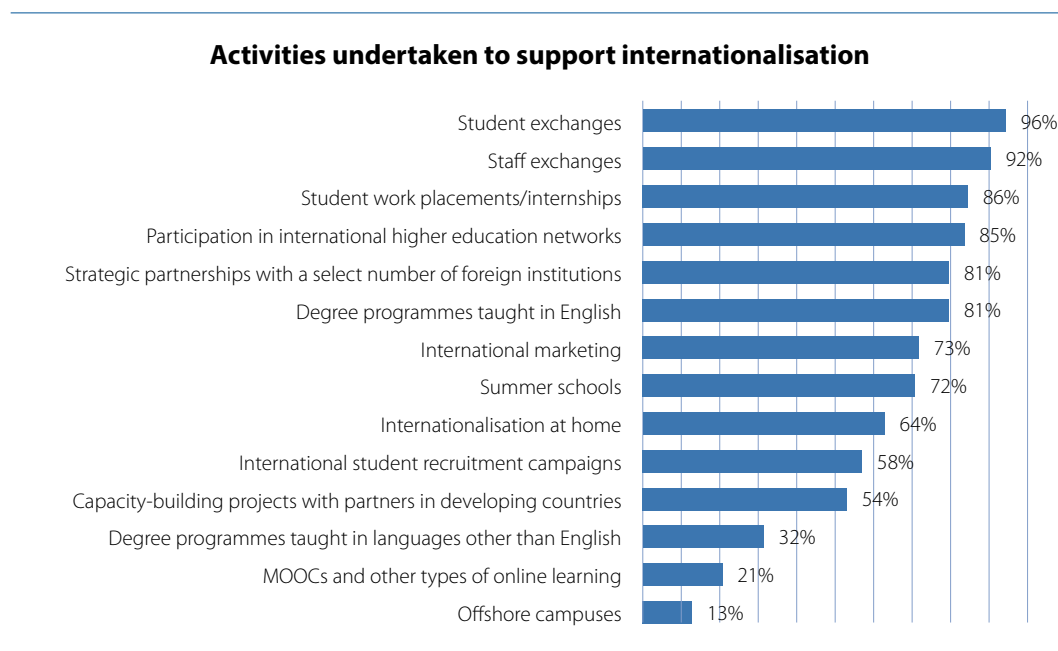
- Although the European Union was among the top priorities for institutions across all countries, it was particularly the case for those located in central and eastern Europe (between 40% and 71% indicated interest in that region). By comparison, interest in the European Union was lowest among institutions in Ireland (29%) and in the United Kingdom (33%).
- Interest in European countries beyond the European Union was strong for Austrian and central and eastern European institutions in general. It was low to non-existent for institutions in all other countries.
- While in most countries institutions are interested in a number of regions, this is not the case in Switzerland (where the majority are interested in Europe) and the United Kingdom

(where the universities are focused on USA/Canada). Portugal is the only country where more than half of the institutions chose “Brazil specifically”.

International activities

Turning now to the international activities developed by universities, there are two observations to be made. First, the most common internationalisation activities (i.e. those with a value of over 50%) testify to a remarkable homogeneity of answers across the respondents. This is reflected in Figure 5.

Figure 5: Does your institution undertake the following activities to support its internationalisation? (Q47)



A close look at the number of institutions interested in developing the four activities that received a lower value might help anticipate future trends. Of these four, “MOOCs¹⁹ and other types of online learning” seem to have the most potential for growth (29% of institutions are planning to develop them), followed by “capacity-building” (17%) and “offshore campuses” (13%), while “degree programmes taught in languages other than English” have the least potential for growth (11%).

Furthermore, there are interesting patterns to note:

- The growth of e-learning activities, including MOOCs, will affect the widest number of countries.
- There is no distinctive link between those engaged in capacity building and their strategic geographical targets: while over 65% of institutions that indicate such engagement also

¹⁹ MOOCs refer to Massive Open Online Courses. The lead which the USA took in their development has prompted some other countries to develop platforms to support their institutions’ development in this area. While MOOCs are likely to become a mechanism of globalisation and internationalisation, their explicit use – beyond increasing international visibility and reputation and attracting students – for exchange and collaboration is still to be developed (Cf. EUA 2014f).

noted their interest in Africa, Northern Africa and the Republic of South Africa as their three topmost priorities, over 57% of those targeting the European Union are engaged in such projects as well.

- Offshore campuses receive the highest proportion of “no” (61%). In addition, institutions in the three countries most likely to develop offshore campuses are starting with almost a clean slate: these are institutions in Ireland, Lithuania and the Russian Federation. (This does not mean that there are no institutions in these countries engaged in offshore campuses but that only those which responded to the Trends questionnaire did not.)

The question of how internationalisation activities support learning and teaching is taken up in Part IV.

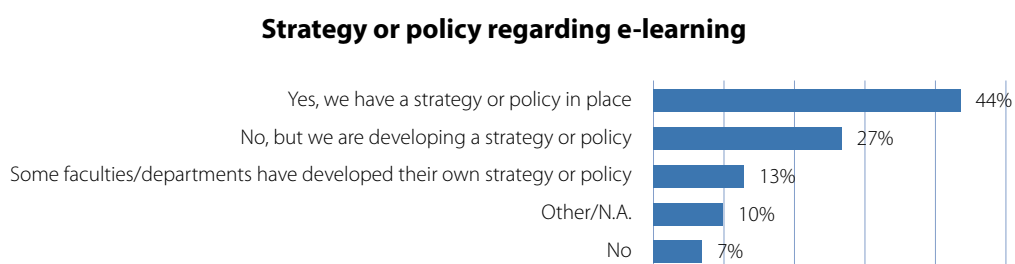
1.2.3 Developments in information and communication technology

Before the turn of the 21st century, a number of publications spoke of technological advances as one of the most important future change drivers in higher education. However, the change was not so visible until the arrival of the MOOCs more than a decade later. By capturing the imagination, MOOCs have come to symbolise the integration of technology in higher education and focused attention on a range of issues that have to do with learning pedagogies and the use of technology-based learning. It is important, however, to understand MOOCs as an epiphenomenon and that deeper change has taken place in this area as the responses to the Trends 2015 questionnaire confirmed.

Thus, information and communication technology (ICT) has been highly important for 62% of respondents, notably in Greece (75%), Hungary (71%), the Russian Federation (79%), Slovakia and Spain (67%), Turkey (81%), Ukraine (100%) and the United Kingdom (67%). While these similar quantitative results need to be interpreted in the context of each country, it is clear that ICT will become even more important (+16 percentage points) in the mid-term as indicated by 78% of the respondents.

Institutions were asked if they had a strategy or policy regarding e-learning (cf. Figure 6): 44% answered positively while 27% are in the process of developing one. A minority (13%) have a decentralised approach to this area and about 7% do not have a strategy. The reasons provided in the open space included the observations that e-learning is part of the overall institutional strategy or a component of the learning and teaching strategy.

Figure 6: Does your institution have a strategy or policy regarding e-learning? (Q40)



ICT is an important institutional priority that affects all aspects of an institution, including learning and teaching (e-learning and blended-learning, learning management platforms, inverted classrooms, MOOCs, etc.) and research (big data, open data), libraries and student support services (e.g. surveys to analyse performance patterns, grades, etc., and developing adequate support to correct weaknesses).

ICT-supported learning and their implications to student learning are discussed in Part IV. At present, it is important to note that the scope of ICT applications is so large and the funds required so important that new posts of vice-rectors are being created to provide oversight of this area. The EUA's e-learning survey identifies this as an emerging trend (EUA 2014b: 42) and shows that institutions are re-thinking how ICT can support their governance, management and planning and the general learning and research environment, including creating units to collect and analyse institutional data.

1.3 Summary of key trends

Demographic trends and the financial and economic crises are having a profound effect on European higher education systems, although to varying degrees.

The weak economic outlook for Europe has resulted in an increase in youth unemployment in many parts of the continent and has prompted a number of governments and intergovernmental organisations to encourage universities to work more closely with the economic sector, whether through policies to stimulate innovation or an emphasis on graduate employability. Universities are responding to these calls, for example by increasing and widening participation, and by ensuring greater interaction and engagement in local and regional communities.

Other key trends observed in the past five years relate to developments in ICT, the growing strategic importance of internationalisation, and the greater attention being paid to rankings and institutional positioning more generally.

PART II:

Dynamic European and national policy agendas

As discussed in Part I, the economic crisis, negative demographic trends in some countries, globalisation, ICT, and internationalisation have been some of the critical developments affecting higher education in the past five years. Other change drivers include European and national policies, which are the focus of Part II.

Specifically, Part II examines three levels of policy-making as follows:

- Section 2.1 is focused on the European Higher Education Area (EHEA), which includes 47 countries (EU and non-EU). It describes the universities' perceptions of the EHEA since 2010 and concentrates on some of the policies that have been the focus of discussion in this current round of the Bologna Process.
- Section 2.2 presents some of the major initiatives of the European Union in relation to research and learning and teaching.
- Section 2.3 is focused on national policy change, with a close look at funding reforms as the most recurring reform identified by Trends respondents.

Part II provides evidence that the policy landscape in Europe is changing: it is becoming more varied and more fragmented than in the past as each country addresses its challenges individually, reflecting national traditions and policies. Bearing in mind that there is no overall European “competence” as such for higher education, this means that fewer common solutions are found despite the commitment to the Bologna Process and the EHEA or the policy and funding support provided by the European Union. The discussion reveals that the universities' commitment to the European Higher Education Area, while still strong, is fragile and needs to be nurtured and that a number of gaps between policy making and institutional priorities should be addressed.

2.1 The European Higher Education Area

The Trends 2015 questionnaire asked institutions about the most important developments in the past three years. Approximately the same question had been posed in *Trends 2010*. Five years ago, the Bologna Process was the top priority development for institutions (EUA 2010: 26) but, when asked about future priorities, it moved down to third position after quality assurance and internationalisation. This prediction turned out to be accurate: today, it is the third most important priority of higher education institutions. This probably reflects the fact that many countries have completed the implementation of the most important parts of the reforms.

The following sections examine the commitment of the institutions to the EHEA and discuss qualifications frameworks, quality assurance, joint programmes and credit recognition which are four aspects that have been the focus of on-going policy discussions in the past few years.²⁰ These sections are largely based on the results of the Trends questionnaire.

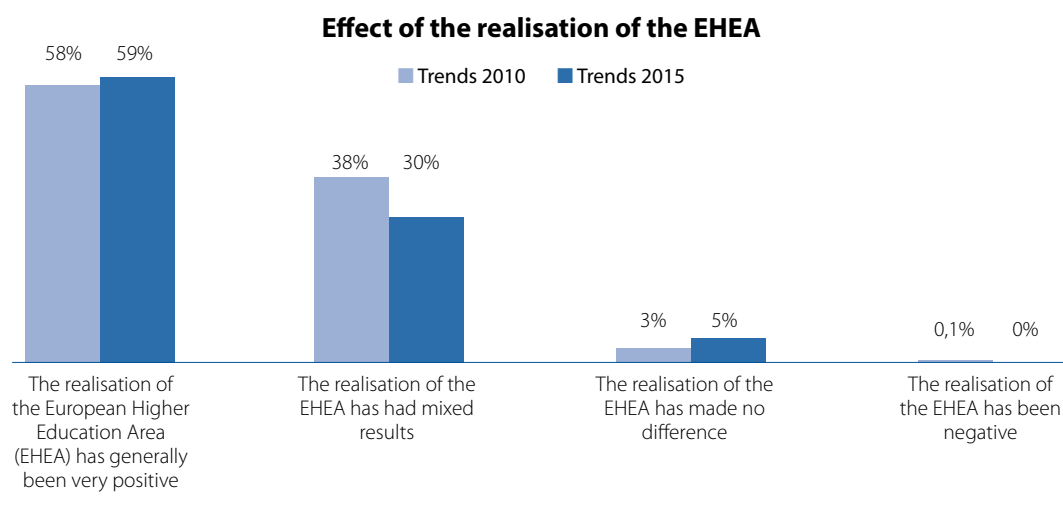
2.1.1 Commitment to the European Higher Education Area

The general rapporteur of the Bologna Researchers' Conference in November 2014 noted that there are "millions of anonymous but committed volunteer promoters of the spirit, ideas, and specific initiatives of the (Bologna) Process." He emphasised that "This is a sociological reality that must not and cannot be ignored by policy makers, while at the same time also acknowledging existing opposition and discontent." (Matei 2014: 6).

This globally positive view is confirmed by the results of the 2015 Trends questionnaire, which reveal that the realisation of the EHEA is valued by a majority of respondents (59%) and that no respondents rate it as a negative development.

In comparison to *Trends 2010* (Figure 7), *Trends 2015* results show an eight-point decrease in those stating that it has had mixed results. The proportions of those noting that it has been very positive, or made no difference, are statistically the same.

Figure 7: Which statement best describes the situation at your institution? (Q8)



In 2010, "it is the countries that initiated the Bologna Process by signing the Sorbonne Declaration²¹ – France, Germany, Italy and the United Kingdom – that perceive it as having had mixed results" (EUA 2010: 29). Today, perceptions are more positive in France, Germany, and the United Kingdom, while in Italy the results have not changed so significantly.

²⁰ ECTS is the fifth policy that has been discussed in the current policy round but, by choice and as opposed to past Trends questionnaires, no questions related to this were included in the 2015 Trends questionnaire in order to make room for new topics such as detailed aspects of learning and teaching.

²¹ The Sorbonne Declaration, the precursor of the Bologna Declaration, was signed a year previously, in 1998.

Apart from these four countries, the most important changes from the 2010 results are found in Hungary and Switzerland where positive answers increased from 53% to 71% and from 40% to 78%, respectively.

By contrast, the Nordic and Baltic countries show a decrease in their support – albeit with the exception of a very strong progression of positive answers in Denmark (from 68% in 2010 to 86% today).

These results demonstrate that, on average, the perception of the EHEA has improved in the past five years but that levels of commitment can change in a positive or negative way. Therefore, it remains important to ensure that the national implementation of any European reform is done wisely.

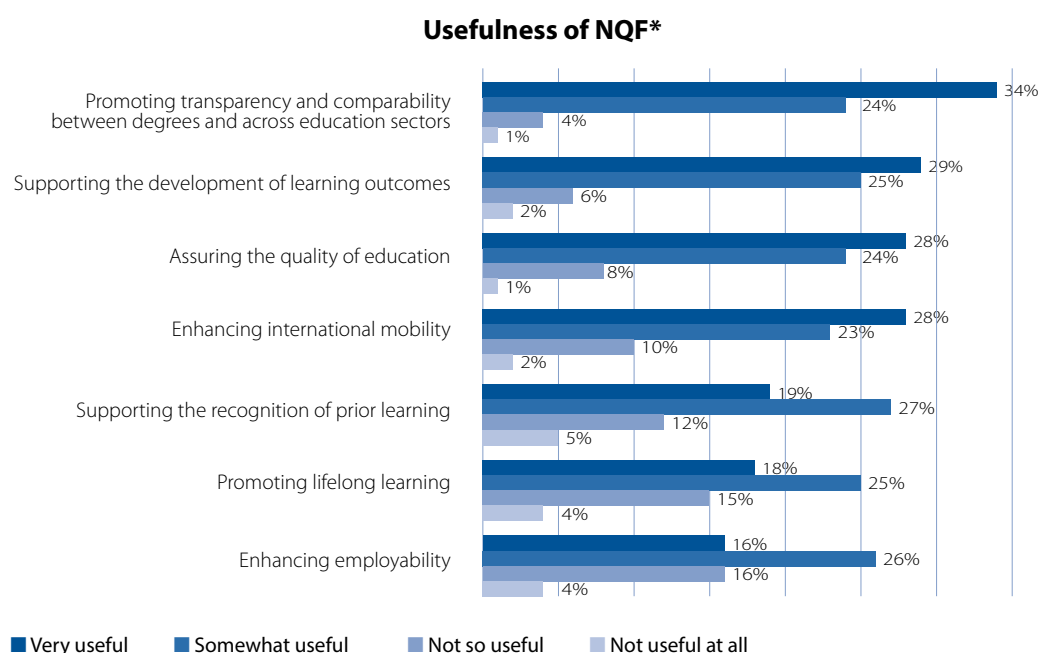
2.1.2 National qualifications frameworks

The development of national qualifications frameworks (NQF) in line with European developments (i.e. the Qualifications Framework for the European Higher Education Area and the European Qualifications Framework of the European Union) has been in process for several years now. The *Implementation Report* (European Commission/EACEA/Eurydice 2015b) that tracks progress with the Bologna reforms identifies ten steps that national qualifications frameworks undergo, including the final self-certification step, which confirms that the NQF is compliant with the QF-EHEA. Some of the steps include discussions with higher education institutions and the implementation of learning outcomes. As of today, NQFs have been self-certified in 19 countries.

Past Trends questionnaires had revealed that some countries had a NQF but that institutions were not aware of it. Therefore, the Trends 2015 questionnaire also probed this area. In answer to the question “do you have a national qualifications framework (NQF)?”, 64% of Trends 2015 respondents replied “yes”, with a further 14% stating “yes, but it is not yet in use”. When examining the patterns of responses by country, it would be expected that all institutions in a given country would answer in the same way. However, this is the case for four countries only – Belgium, Ireland, the Netherlands and the United Kingdom.²² The gap between the reality and the institutional responses is inexplicable, particularly since the self-certification process requires that the NQF be fully used by institutions.

The institutions with NQFs were asked what kind of impact this had on a variety of items. The responses are globally positive: NQFs are essentially seen as “very useful” to “somewhat useful” (Figure 8). This is particularly true regarding their impact in promoting transparency, most notably for 71% of Irish institutions, 83% of the Italian institutions and 87% of institutions in the United Kingdom.

²² In the case of the United Kingdom, there are three UK QFs: England and Northern Ireland, Wales, and Scotland. All three are referenced to EQF and figure in the comparison tool on the EQF website: <https://ec.europa.eu/ploteus/en/compare>

Figure 8: If you do have a NQF (Q59), do you find it useful in relation to the following? (Q59.1)

* Q59.1 was answered exclusively by those 64% of Trends 2015 respondents that stated to have a NQF in Q59

Those with NQFs see them as having a “very useful” or “useful” role in four areas: “promoting transparency and comparability between degrees and across education sectors” (58%), “supporting the development of learning outcomes” (54%), “assuring the quality of education” (52%), and “enhancing international mobility” (51%). Interestingly, and as will be seen in Part IV (Section 4.4.1), 64% have developed learning outcomes for all courses and 21% for some courses, even though only 29% consider that the NQF has been very useful for developing this approach.

These results may indicate that NQFs are still a new development in many countries and, more significantly, that they may not be so useful beyond the academic community. Indeed, the wider public might find that it is more tangible to refer to a Bachelor, a Master or a Doctorate degree rather than to level 6, 7, or 8. However, the perceptions of the usefulness of NQF might change with the further development of lifelong learning, the diversification of modes of delivery and more flexible learning paths.

2.1.3 Quality assurance

Quality assurance (QA) has been central to the Bologna Process and the creation of the EHEA as shown by the 2015 Trends responses indicating that it has had high importance to 73% across the sample. This is notably the case in Denmark (86%), Germany (88%), Italy (83%), Lithuania (100%), the Netherlands (89%), Poland (81%), Portugal (93%), Romania (83%), the Russian Federation and Turkey (78%) and Sweden (86%).

The European QA framework – which includes the *European Standards and Guidelines for Quality Assurance in the Higher Education Area* (ESG) (ENQA 2005) and the European Quality Assurance Register (EQAR) – has confirmed its pre-eminence as a key change driver for institutional and national QA developments. The European Quality Assurance Forum (EQAF) has been a

very successful event that has served as an effective platform for exchange on this topic. It is celebrating its 10th anniversary in 2015.²³

The ESG were adopted in 2005 and address internal and external quality assurance. A revised ESG document has been endorsed by the Bologna Follow-Up Group and will be formally adopted at the ministerial meeting in Yerevan (May 2015). The text has been modified to make it user-friendly (e.g. clarifying ambiguous formulations, distinguishing better between standards and guidelines) and considers current “hot issues” such as learning outcomes and employability while avoiding the alluring trap of using QA as a panacea for addressing all the challenges faced by higher education.

It is important to note that these developments have been driven by the E4 Group, which includes representatives from the students, the institutions and the quality assurance agencies. They have been successful in developing a “co-regulatory” framework that balances the needs for accountability and ownership of quality (EUA 2011c; UUK 2015).

Internal quality assurance

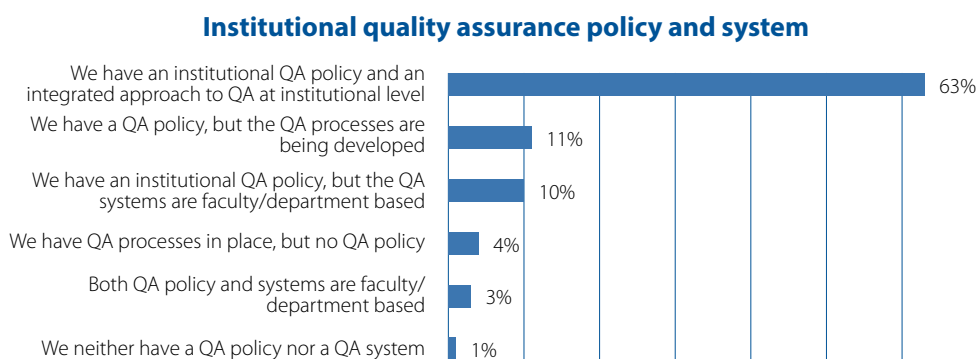
At the institutional level, the most important change during the first decade of the 21st century was identified as the development of internal quality assurance processes: 60% of the 2010 Trends respondents recognised it as a major institutional development “in the past ten years”, which placed it as the top change driver for institutions in Europe (EUA 2010: 18).

This was confirmed by the 2010 “Examining Quality Culture” survey, to which 222 institutions from 36 countries responded. This study concluded that the bulk of QA processes were introduced after the ESG had been adopted in 2005 (EUA 2010: 21). It should be noted that the QA agencies are required by the ESG to check that internal quality processes have been implemented in higher education institutions, thus providing further impetus for the development of internal quality assurance.

As a sign of the importance of internal quality assurance, two new acronyms are now in use: EQA (for external QA) and IQA (for internal QA), in addition to the ubiquitous QA (for quality assurance in general).

The results of the Trends questionnaire reveal that an increasing number of institutions have institutional QA policies and processes that are used for institutional planning and improvement. As Figure 9 shows, the large majority have institutional-wide policies and processes (63%); nearly 13% have one or both aspects based in the faculties; 15% have either processes or policies and only 1% of institutions have “neither a QA policy nor a QA system”.

²³ <http://www.eua.be/eua-work-and-policy-area/quality-assurance/eqaf.aspx>

Figure 9: Does your institution have an institutional quality assurance policy and system? (Q51)**Table 2: Country data on institutions with an “institutional QA policy and an integrated approach to QA at institutional level” (Q51)**

25%-49%	50%-74%	75%-100%
Czech Republic	Denmark	Austria
France	Germany	Belgium
Sweden	Greece	Finland
Turkey	Italy	Hungary
	Latvia	Ireland
	Netherlands	Lithuania
	Poland	Norway
	Portugal	Romania
	Russian Federation	Spain
	Slovakia	Switzerland
	Ukraine	United Kingdom

Thus, it appears that there has been considerable development in internal quality processes across Europe.

Furthermore, the Trends 2015 results also show progression in the involvement of students in internal quality processes. The 2010 EQC survey on the question noted that student involvement in formal QA processes was not widespread (EUA 2010: 25). The European Student Union (ESU) noted two years later that the level of knowledge about quality assurance was rather low among students: close to 60% do not know what it is and around half of them do not know how to become involved. The notable exception is Norway “where the knowledge on ways to get involved seems to be better than in the other countries included in the study” (ESU 2013: 63).

Today, the great majority of institutions responding to the 2015 Trends questionnaire (83%) state that their “students participate actively in quality assurance activities (i.e. as members of university or faculty QA committees)”.

National quality assurance and other accountability requirements

A number of developments have contributed to changing national accountability requirements, of which quality assurance is one key element. This is true in Europe and elsewhere in the world. A recent analysis that focused on Australia, Norway and the USA emphasised three change drivers (HEFCE 2015: 2-3):

- QA arrangements are “set within particular political contexts which are themselves subject to change as successive governments of different political persuasions change the direction of higher education policy and, particularly, funding for higher education”.
- QA arrangements are part of broader regulatory frameworks that are themselves subject to change thus resulting in a cascade of changes.
- QA arrangements include a number of systems carried out by different agents – the institutions, professional bodies, national QA agencies – and each of these is in a state of flux.

In addition, new modes of delivery (ICT-based, collaborative, etc.) prompt agencies to re-examine the scope of EQA and the corresponding IQA responsibilities.

Some of the notable changes in Europe include the merging of some QA agencies (e.g. in Austria, the Flemish Community of Belgium, Ireland) in order to provide a single agency with a greater range of operations such as bringing under its scope the vocational colleges and universities and, in some cases, the responsibility for the national qualifications framework.

Other changes affect the focus of the agencies’ work. According to Maria Kelo (2014), current trends among the membership of the European Association for Quality Assurance in Higher Education (ENQA) include a movement towards audits and institutional evaluations that are more flexible, contextual and mission-driven. She notes, however, a paradoxical development in the growing “importance of identifying excellence (attractiveness of HE and promotion of innovation)”. She identifies the key features shared by the ENQA membership as a new stress on enhancement, an “increased focus on institutional (internal) QA and the creation of quality culture”, and the involvement of stakeholders and students in the agencies’ work.

In addition to external QA processes, many countries have extended their reporting requirements, such as requiring institutions to produce information on the career trajectories of their graduates, or establishing university boards that include external members. The 2011 EUA’s autonomy scorecard found that in 20 of the 28 systems surveyed, these boards must include external members. Their mode of appointment is indicative of their accountability function. Thus, appointment systems vary from those (six countries) where the national authorities alone decide on these appointments to those (nine countries) where the institutions and the national authorities make the appointment jointly. In only five countries are universities free to appoint external board members without external interference (EUA 2011b: 27-28).

The internationalisation of quality assurance

Two noteworthy developments in EQA have been the greater use of international peers and the number of quality assurance agencies working together on specific evaluation projects (Surssock 2011: 129). As a recent example, the French agency that accredits engineering (CTI) worked

with the evaluation agency of the French Community of Belgium (AEQES) to evaluate jointly the university engineering degrees. While both agencies share a common language, their QA approach is different: CTI accredits and AEQES evaluates. The project consisted in integrating these two approaches.

Although this type of cooperation is developed at the request of the higher education institutions and provides evidence of their concern for international positioning, it also demonstrates the interest and willingness of national QA agencies to internationalise and work across national borders. These international partnerships strengthen the exchange of good practice among quality assurance agencies, ensure greater understanding and build trust across higher education systems within the EHEA. In so doing, they extend ENQA's work in promoting shared values and good practices in this area.

A more recent trend is developing, however, in which QA agencies export their services across borders. Thus, Kelo (2014) observed that among ENQA members, the scope of activity has broadened to include consultancy and cross-border activities but that national regulations are still driving the majority of QA agencies' activities.

EQAR sought to map these cross-border activities in a recent project (EQAR 2014).²⁴ Among the issues highlighted by the report, two are particularly important:

- Over half of the agencies that work across borders “change their practice when they go abroad”. These changes affect the criteria used and whether the reports are public (EQAR 2014: 28-29), thus raising questions as to the compliance of some EQAR-registered agencies with the ESG when they are working across borders.
- The study estimates that three-quarters of the cross-border QA activities are initiated by the higher education institutions (and the remaining by ministries) (EQAR 2014: 28) and that this type of activity is taking place in 39 of the 47 EHEA member countries (EQAR 2014: 47). However, despite the commitment expressed in the Bucharest Communiqué (2012) to allow institutions to select any EQAR-listed QA agency (based on the European Parliament's and Council's recommendation of 2006) only 12 higher education systems within the EHEA do so for mandatory external QA.²⁵ Therefore, from the perspective of higher education institutions, cross-border external quality assurance comes on top of the national QA process: “It might thus lead to an unproductive duplication of efforts.” (EQAR 2014: 47).

The internationalisation of quality assurance agencies is developing quickly – if not chaotically²⁶ – and is being driven by the combined international aspirations of the QA agencies and the higher education institutions. In doing so, both the institutions and the agencies are ahead of some national authorities that seem reluctant to support the EHEA with cross-border quality assurance and allow institutions to turn to any EQAR-listed agency for their external accountability.

²⁴ The “RIQAA” project included a questionnaire that was answered by 60 quality assurance agencies (QAA) located “in 30 of the 47 EHEA member countries and in seven other non-EHEA territories/countries (i.e. Australia, Kosovo, Hong Kong, Japan, Philippines, United Arab Emirates and United States of America)” (EQAR 2014: 22). Among these, seven were created to operate internationally. Of the 53 that were set up specifically to carry out a national accountability process only three did not engage in any cross-border activity.

²⁵ Twelve higher education systems have specifically referenced EQAR registration in their legal provision, thus allowing another agency to substitute for the national one. These are: Albania, Austria, Armenia, the Flemish Community of Belgium, Bulgaria, Denmark, Germany, Kazakhstan, Lithuania, Lichtenstein, Poland, Romania.

²⁶ The RIQAA project provides a range of cogent recommendations to address these issues.

2.1.4 Joint programmes

Joint programmes have been one hallmark of European higher education and a way of capitalising on European cultural, linguistic and academic diversity. The Trends 2015 questionnaire asked institutions about their engagement in developing joint activities and with what type of partners. The options they were given included the following:

- Joint activities in their country: with other higher education institutions that are similar; with higher education institutions that are different; with other types of structures.
- Joint online degree programmes with other higher education institutions.
- International joint programmes at the first, second or third cycle or joint non-degree activities.

The main findings are as follows:

International joint programmes are offered at all three award levels, albeit with a higher percentage at the Master's level. Institutions in Belgium, France, Germany, Italy, Poland, Spain and Turkey are most active in international joint programmes in general.

National joint programmes are most likely to be found in Belgium, Finland, France, Germany, Greece, Ireland, Lithuania, the Netherlands, Portugal, the Russian Federation, Spain and the United Kingdom. With the exception of Greece, Portugal, Spain and the United Kingdom, these are the countries where a higher proportion of institutions than average consider that regional cooperation has high importance.

About 22% of the respondents state that they do not offer joint programmes with partners from their own country, most notably in the Czech Republic (50%), Hungary (43%), Latvia (43%), Romania (33%), Slovakia (44%), Turkey (32%) and Ukraine (71%). Further study would be required to explore whether this is related to the lack of funding incentives, a weak culture of inter-institutional cooperation within the country due to, for instance, academic inbreeding, the significant presence of private institutions, negative demographic trends that are exacerbating competition, legislative constraints, or other factors.

Joint online learning with other higher education institutions is offered by 22% and a further 17% are planning to do so in the future. The first figure includes all the open universities that responded to the questionnaire: all offer joint online learning either across the institutions or in some faculties. If these are removed, then 18% of institutions offer joint online learning with other higher education institutions.

I. Institutions that offer joint programmes with higher education institutions in other countries

- Bachelor, 37%
- Master, 70%
- Doctorate, 44%
- "Joint non-degree activities", 14%
- 18% do not engage in any such undertakings

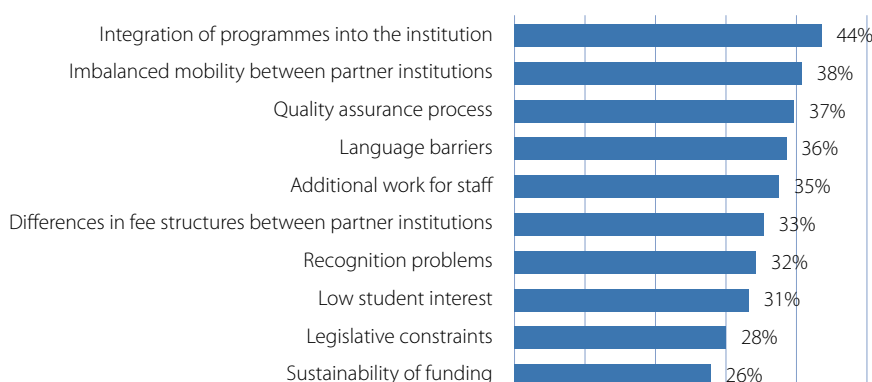
II. Institutions that offer joint programmes with partners in their country

- 68% offer joint programmes with other higher education institutions that have a similar profile, most notably in Belgium (100%), Finland (88%), France (83%), Germany (76%), Greece (88%), Ireland (71%), Lithuania (100%), the Netherlands (89%), Portugal (93%), Russian Federation (74%), Spain (75%) and the United Kingdom (73%).
- 27% offer joint programmes with higher education institutions that have a different profile, particularly in Austria (50%), France (44%), Germany (43%), Greece (38%), Lithuania (33%), Norway (46%), Russian Federation (42%), Sweden (50%), Switzerland (44%).
- 20% offer joint programmes with non-higher education partners, specifically in Austria (30%), France (28%), Germany (29%), Hungary (43%), Ireland (29%), Poland (30%), Russian Federation (58%), Ukraine (29%) and the United Kingdom (40%).²⁷

Institutions could rate the challenges associated with such activities on a four-point scale. The most frequent choice is “somewhat challenging” and the most important issue has to do with the integration of joint programmes into the institutions, which was one of the main findings of EUA’s study on joint programmes that was conducted in 2004 (EUA 2004).

Figure 10: (If your institution offers joint programmes with institutions in other countries), what are the main challenges associated with these programmes? (“Somewhat challenging” aspects) (Q50.1)

“Somewhat challenging” aspects of international joint programmes



A tabulation of “very challenging” issues (Table 3) confirms this finding. It also shows that a greater number of challenges seem to be facing Slovak institutions as compared to institutions in other countries. According to the Slovak Rectors’ Conference, this is mainly due to a constraining legislative framework, a complex QA process, and an unstable and unfavourable funding situation.

²⁷ As mentioned in the introductory chapter to this report, the Russian and Ukrainian results are identified but not interpreted. In addition, only countries with at least four institutions that responded to the questionnaire are included in the country analysis.

Table 3: (If your institution offers joint programmes with institutions in other countries), what are the main challenges associated with these programmes? “Very challenging” aspects (Q50.1)

Aspects that are “very challenging” for at least 50% of institutions in a given country	
Integration of programmes into the institution	Greece 71% Italy 50%
Imbalanced mobility between partner institutions	Austria 50% Finland 50% Romania 50% Slovakia 50%
Quality assurance process	Greece 57% Slovakia 50%
Language barriers	Austria 50%
Additional work for staff	Austria 50% Finland 83% Germany 50% Slovakia 50%
Differences in fee structures between partner institutions	Greece 57% Latvia 50%
Recognition problems	None with 50% or over
Low student interest	None with 50% or over ²⁸
Legislative constraints	Latvia 100% Lithuania 80% Norway 56% Slovakia 50% Switzerland 75%
Sustainability of funding	Finland 50% France 59% Ireland 83% Lithuania 80% Romania 50% Slovakia 83%

The aspects that receive a relatively high proportion of “not at all challenging” answers include low student interest (31%), recognition problems (29%), language problems (25%).

It is clear that if international joint programmes are to be further promoted, many of their aspects would require greater attention, primarily on the part of the higher education institutions, and secondarily by the funders and the legislators and that, from the perspective of institutions, quality assurance is not the overriding challenge which these programmes face.

This being said, joint programmes have presented a challenge to the QA agencies, particularly in countries that are required to evaluate or accredit study programmes. In these cases, joint programmes can be subject to multiple QA procedures that would not capture their “jointness” and their essence (EUA 2006). Following the Bucharest ministerial meeting in 2012, the Bologna Follow-up Group endorsed a proposal to ease the external quality assurance of joint programmes. The proposal (subject to approval by the EHEA ministers in Yerevan) allows institutions to undergo accreditation or evaluation at the study programme level by selecting an EQAR-listed agency to carry out the work on the basis of the agreed guidelines. In addition, the approach invites higher education institutions to use these guidelines for the internal quality assurance of their joint programmes, as it befits them.²⁹

²⁸ 50% of Latvian institutions rated this item as being “extremely challenging”.

²⁹ <http://www.ehea.info/news-details.aspx?ArticleId=365>

2.1.5 Credit recognition

Student mobility has been identified by the Trends 2015 respondents as the most important factor contributing to the improvement of learning and teaching (cf. Section 4.2). It has been the focus of attention of institutions and the national and European policy actors who have been keen to limit the potentially negative impact of credit recognition on mobility. Thus, a range of initiatives has been taken to ease credit recognition, among others in the framework of the Bologna Process, by the European Union and its ERASMUS scheme, the Lisbon Recognition Convention, etc.

Nevertheless, ESU (2012: 35) identified recognition problems as the second major obstacle to student mobility after the financial aspects. More recently, Grabher *et al.* (2014: 20) confirmed that recognition problems concern many potentially mobile students although this is one among many other obstacles such as loss of income, additional costs, separation from partner and family, and so on.

Addressing the challenges of recognition has been a priority of the Bologna Follow-up Group during the period 2012-2015 following the Bucharest Communiqué. Recognition has been considered in the revised ESG (Standard 1.4) and in the new ECTS Users' Guide. Furthermore, a newly established "Pathfinder group on automatic recognition" (PFG) was mandated to develop a proposal for automatic recognition of qualifications in Europe. The PFG makes detailed recommendations, which will be submitted to the ministers in Yerevan. The report serves as a reminder of sound recognition principles but should be considered alongside the revised ESG – Part I, which underlines the responsibility of the institutions in the matter (PFG 2014).

Given the importance of the credit recognition process, the 2015 Trends questionnaire posed a number of questions to assess how much progress has been achieved since *Trends 2010*. The 2015 results confirm the *Trends 2010* analysis. The responsibility for recognition decisions is lodged in different offices depending on the type of dossier. Thus, central offices tend to process whole degree programmes while faculties – and to a lesser extent, departments – tend to process short-term mobility periods.

From the point of view of institutions, the process of credit recognition seems to be working satisfactorily. Where recognition problems are reported to exist, they were found slightly more often across the institution (52%) than in specific faculties (48%).

The types of problems encountered were elicited in an open question. The answers point to two broad types of challenges:

- The largest number of answers revealed a misplaced focus on the notion of equivalency. This includes differences in content, credit points, length of studies, types of examinations and grading cultures. The tendency of individual teachers (and more rarely faculties) to apply equivalence criteria rigidly is mentioned in a few answers. Occasionally, respondents noted that a learning-outcome approach or the existence of a national qualifications framework provides a new way to look for incompatibilities rather than to support the recognition process.
- A smaller, albeit significant number of answers, noted unexpected changes to learning agreements and lack of full or precise information provided by host institutions.

the 2015 results confirm the enduring nature of these challenges. However, it is also clear that institutions take credit recognition seriously and that this is not an *ad hoc* and informal process by any means:

- 81% have institutional policies and guidelines for this area and a further 7% are planning to do so.
- 39% evaluate their recognition procedures. In many cases, this is done as part of the internal quality assurance system and includes data that are collected through questionnaires, focus groups of students and staff, faculty feedback, analysis of statistics, or the external examiner process. The process is often guided by “European criteria”.³⁰ In addition, even when the process is decentralised to the faculties, there is central oversight by a university body or committee and coordination to ensure a coherent approach across institutions.
- A small number of institutions mention that they include recognition as a topic in their staff development modules and meet with student organisations to ensure that accurate information reaches the students.

The issue of recognition is important for student mobility in general, whether it is within national borders, within the EHEA or beyond. It is particularly important to cross-border mobility given the increased internationalisation trends in the world and the fact that Europe is an important study destination. Thus, *OECD at a Glance* (2014: 346-347) shows that seven European countries are among the most important hosting countries in the world. By order of importance, these are the United Kingdom, Germany, France, the Russian Federation, Austria, Italy and Spain.³¹

2.2 European Union policies, instruments and funding support³²

The European Commission (EC) supports the construction of the EHEA as well as higher education and research within the European Union (EU) and globally. Higher education in the EU remains, however, a national competence. EC activities consist in providing policy proposals, advice, status reports and funding for both European projects and cross-border exchange and collaboration. The following section discusses the EC priorities for the EHEA and the EU.

The European Union policies and funding play an important role in the development of the EHEA as well as in its visibility in the wider world. The European Commission is an active player in the Bologna Process and – along with the cost-sharing contribution of participating countries – is the only major source of funding for joint European action. The EU also provides support to non-EU Bologna countries in the framework of its Eastern Neighbourhood Policy. In recent years, the EHEA and EU higher education policies also appear to be converging to an extent more than in the past (e.g. growing emphasis on the relevance of education for employment and the economy; joint use and to some extent even joint ownership of some policies and instruments, such as ECTS, qualifications frameworks, and the objective of 20% graduate mobility by 2020).

³⁰ European criteria were mentioned in some responses but without explanation as to what they are.

³¹ According to OECD (2014), the most important hosting countries are the USA (16%), the United Kingdom (13%), Germany (6%), France (6%), Australia (6%), Canada (5%), the Russian Federation (4%), Japan (3%) and, at 2%, Austria, China, Italy, New Zealand and South Africa.

³² Michael Gaebel and Lesley Wilson have written this section.

Since 2010, there has been a rapid sequence of European communications targeting specific elements of higher education or set as part of an EU-wide agenda. The EU2020 Strategy is an example of the latter. It seeks to respond to the challenges of a very adverse economic and political climate than was the case for the Lisbon Agenda almost a decade previously.³³ It focuses on innovation (rather than research), new skills and jobs, but also digitalisation, resource efficiency, and poverty reduction. Greater importance is attached to education, including higher education, but with an emphasis on its contribution to improving the skills of the workforce and jumpstarting an economic recovery.

In line with these objectives, the second EC Modernisation Agenda (2011)³⁴ calls upon member states and institutions to increase participation in higher education (40% by 2020), improve the quality and relevance of higher education (“curricula, including researcher training, must be attuned to current labour market needs. New technologies must be exploited ...”), promote mobility and cross-border cooperation (by 2020, 20% of graduates should have completed a period of study or training abroad), linking higher education, research and business, and promoting entrepreneurial, creative and innovative skills. These are not new issues, but clear targets are now set and the tone underlines the urgency, and puts a stronger focus on diversification of funding sources and performance-based funding.

In 2012-13, the EC Communication entitled “Rethinking Education; Investing in Skills for better socio-economic outcomes” reiterated the Modernisation Agenda priorities in a broader context including policy priorities proposed for other education sectors which referred specifically to the development of a “European Skills and Qualifications Area”. In response to the 2014 consultation on this topic, many in the higher education sector voiced concerns about the new top-down approach that is reflected in the rapid pace at which new policies were being launched, and the tendency to underpin them with too much information and “transparency instruments.”³⁵ These include U-Multirank, the European Tertiary Education Register (ETER), support to the OECD initiative for assessing students’ learning outcomes (AHELO³⁶) and adults’ skills (PIAAC³⁷), a number of information portals (European Skills Panorama which, among other matters, lists graduate surveys from different European countries; Ploteus on European learning opportunities; and ESCO on skills, competences, qualifications and occupations classification).

However, EC initiatives and funding clearly continue to provide valuable support to European higher education, particularly in areas that are not fully exploited at national level. For example, joint degrees, institutional partnerships and other actions and initiatives supported by EC funding have become established formats for European and international exchange and collaboration and have given a competitive advantage to Europe and European higher education institutions. The role of the EC was recognised in a EUA membership consultation (EUA 2013b) when 91% responded that there would be an added value in having an EU strategy for internationalisation, particularly in promoting internationalisation to university leadership, national bodies and to the wider university community.

³³ In 2003, the goal of the Lisbon Agenda was to ensure that Europe becomes “the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion” (2003). In 2010, the EC called for “smart, sustainable and inclusive growth” to overcome an unprecedented economic crisis, and preserve its political cohesion.

³⁴ The first Modernisation Agenda in 2006 (“Delivering on the modernisation agenda for universities: education, research and innovation”) emphasised university autonomy and funding while the 2011 communication came under the motto “Supporting Growth and Jobs”.

³⁵ In the past, tools and instruments to support the EU unification process were developed successfully in partnership with the stakeholders. Thus, the European Credit Transfer System (ECTS), together with the diploma supplement, jointly developed by the EC, the Council of Europe and UNESCO, has been adopted as part of the Bologna Process. The European Qualification Framework for Lifelong Learning, launched in 2008, was perceived initially as competing with the EHEA-QF, which was developed for the EHEA, but today appears largely aligned with it.

³⁶ <http://www.oecd.org/education/skills-beyond-school/testingstudentanduniversityperformancegloballyoecdahelo.htm>

³⁷ <http://www.oecd.org/site/piaac/surveyofadultskills.htm>

Similarly, the communication on “Opening up Education” in 2013 addressed the key issues of digitalisation, in particular in learning and teaching (and, in the process, managed to bridge two Directorates: DG Education and DG Connect³⁸). The principle of incorporating Open Educational Resources and open licencing in all EC projects has become the rule for projects funded under Erasmus+³⁹, and the Commission has recommended to member states the use of open standard licences⁴⁰. Further measures are awaited. Interestingly, the link has not been made to developments prioritised by DG Research in the context of building the European Research Area (ERA), notably concerning open access and open science – yet another area of crucial importance for the future of higher education and particularly universities.

In other areas, however, the link with research and the ERA has been emphasised both in the Bologna Process, and in DG EAC policy (e.g. the Modernisation Agenda). For instance, the focus on the doctorate is a shared concern for both DG EAC and DG Research and features widely in their respective policy and funding measures, particularly since there is an inclusion of a reference to the ERA in the Lisbon Treaty.

It should also be noted that there are other EU portfolios that impact higher education, directly or indirectly, where the Union has a more decisive role in policy making and legislation. Apart from research, this is the case for the recognition of professions, competition rules, and international trade agreement negotiations to name but a few, all of which may include and affect education provision – and are not necessarily aligned with what the EC and its member states agree to in other arenas, such as the Bologna Process.

Future steps in EU policy making on higher education and research will probably require proactive support and increased advocacy from the sector. In 2014 the European Commission introduced a streamlined, “new collaborative way of working” and defined 10 overarching priorities, none of which mention higher education and research explicitly. Further developments will be watched carefully by the sector.

2.3 National reforms

Despite the coordination effort of the EC, the national policy reform process is very dynamic but one that is no longer convergent even within the European Union. This is particularly striking in the context of the disparity caused by the economic crisis. The policy approaches vary from country to country and there is little policy coordination at the European level.

Section 2.3.1 provides an overview of policy change, based on the response to the Trends questionnaire, while Section 2.3.2 focuses specifically on funding reforms as the most recurrent national policy change in the past three years. This second section is based on the results of various projects and studies.

³⁸ European Commission Directorate General for Communications Networks, Content & Technology.

³⁹ Opening up Education Communication 2013 <http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1389115469384&uri=CELEX:52013DC0654> – “The Commission will: Ensure that all educational materials supported by Erasmus+ are available to the public under open licenses and promote similar practices under EU programmes”.

⁴⁰ Commission Notice: ‘Guidelines on recommended standard licences, datasets and charging for the re-use of documents’ 17 July 2014.

2.3.1 The dynamic and fragmentary nature of national policy change

The 2015 Trends questionnaire gave institutions the choice of 12 policies that could have affected them in the past three years. They were asked to assign a value to these (high/medium/low importance) (cf. Appendix 2, Q9).

The analysis of the full set of responses reveals that the change agenda has continued to be very active since 2010 as demonstrated by the fact that all 12 items proposed received a low response rate on the option “there has been no reforms or initiatives”. In addition, nine of the 12 items were rated as having been highly important by over 50% of respondents.

The most frequently cited reforms today are:

- Funding: 13 countries
- Quality assurance: 12 countries
- Student recruitment: 11 countries
- Internationalisation: 11 countries
- Governance and autonomy: 10 countries
- Other reforms affected between four and nine countries. They included research or teaching-related policies, learning outcomes, access, lifelong learning, and tuition fees.

These responses reveal that there is less convergence to national policy change across Europe than was the case five years ago.⁴¹ Thus, the key policy changes in *Trends 2010* tended to be fewer and to affect more countries (EUA 2010: 15):

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

Moreover, 12 countries have been reforming their reforms or, in some cases, still implementing them. Thus, the following national policy changes were reported in both 2010 (EUA 2010: 16-17) and 2015:

- Czech Republic: funding and research policies
- Denmark: quality assurance

⁴¹ However, a recent OECD report (2015a: 71) shows that policies to strengthen quality and access have been introduced in 17 higher education systems in Europe: Austria, Belgium (French and Flemish communities), Czech Republic, Denmark, Finland, France, Greece, Hungary, Iceland, Ireland, the Netherlands, Norway, Slovak Republic, Slovenia, Spain and Turkey. The gap with the Trends results is probably due to the fact that only countries with at least five responses are considered in Trends country analysis.

- Finland: funding and autonomy
- France: research and autonomy
- Germany: quality assurance
- Hungary: research
- Ireland: research
- Italy: autonomy
- Lithuania: funding
- Netherlands: funding and quality assurance
- Poland: autonomy, quality assurance and research
- United Kingdom: funding⁴²

Furthermore, while institutions in all countries have noted that at least one reform was highly important, some countries were affected by more reforms than others. The largest spread is between, on the one hand, Poland (11 reforms), Latvia and the Russian Federation (8 reforms each) and, on the other hand, Austria (1 reform), Denmark, Norway and Switzerland (2 reforms each). These differences are probably related to different political cultures, with some countries favouring the use of legal instruments as change drivers.

2.3.2 Funding reform – the most recurrent policy change

It appears that policy development in higher education has continued unabated since the last Trends report and funding reforms have been the most frequent type of national policy change (quality assurance is a close second and is already covered in Section 2.1.3). Each country is considering these reforms in the context of national needs, with the European level limited to the exchange of good practice as part of the Open Method of Coordination.

The funding crisis has had a number of consequences, including introducing different ways of allocating funding to higher education institutions (EUA, 2013b). The EUA Funding Observatory (2014c) notes that some funding reforms have altered the balance between core funding and competitive project funding. The increased share of project-based research funding has contributed to the growth in the number of researchers on fixed-term contracts; in parallel, recruitment freezes and contractual changes have increased the number of adjunct teachers while the salaries and pensions of civil servants – including those of academic and administrative staff – have been cut in a number of countries.

⁴² In 2012, the UK government raised the first-cycle tuition fee to a maximum of GBP 9 000 per annum. The system applies to England, Wales and Northern Ireland, but not to the devolved authority in Scotland. The arrangements are complex, as has been the impact on the patterns of internal mobility, including on Scotland. The implications for revenue and sustainability at institutional level are also complex. A recent Financial Times article reported that “Ministers have set aside £2bn to cover potential write-downs in the value of existing student loans in this financial year alone amid an increase in graduates’ failure to repay” (Pickard 2015). Up-to-date information is available at <http://www.thecompleteuniversityguide.co.uk/university-tuition-fees/>

There is also evidence of a changing income mix with the growth of funding from private sources, including within systems that were committed to the primacy of public funding. Thus, the balance between private and public funding is changing, leading to the ever-greater privatisation of public higher education, particularly in the western parts of Europe (cf. Section 1.1.2).

The importance of funding reforms is reflected in the responses to the Trends questionnaire, which show that funding reforms have been highly important in the last three years for 58% of respondents and that this is the single reform that has touched institutions in the greatest number of countries. The importance of funding reform increased by 13% points since *Trends 2010* and has affected even the countries that have been relatively shielded from the crisis, such as Finland, the Netherlands and Switzerland.

As a result, while there are major divergences across Europe, the issue of tuition fees has been highly important to 34% of Trends 2015 respondents and for 100% of institutions in Ireland and the United Kingdom (England and Northern Ireland, Wales). In some countries (e.g. Ireland, Sweden) this is linked to the introduction of tuition fees for non-EU students or for some types of courses (e.g. courses taught in English, lifelong learning). Needless to say, this is an issue that results in a great deal of tension whenever it is debated. Thus, some countries (e.g. Finland, Norway) floated the idea of introducing fees for non-EU international students but then withdrew it, or put it on hold in the face of opposition. Other countries, such as Germany, abolished tuition fees (Bavaria was the last state to do so in 2014-15),⁴³ although tuition fees are still charged in some German states for continued professional education. Austria discontinued general tuition fees for domestic and European students.⁴⁴

A number of other measures are presently being introduced that affect the funding of institutions. These include efficiency measures, performance-based funding, concentration schemes, and mergers and alliances, which have been examined in the EUA DEFINE project.⁴⁵ These approaches are used in various ways in different countries. Thus, while

... the DEFINE project indicates that the variety of funding tools that are currently available or put to use is limited (certain funding tools are more commonly used than others)... the variety of situations is not mirrored by a variety of funding tools in Europe. The exact selection of particular tools even from this limited portfolio, however, combined with the level of funding, contributes to increasing diversity. (Matei 2015: 7)

These various approaches, however, do share one aspect: the first decade of the 21st century had been characterised by the enlarged scope of institutional autonomy that swept across continental Europe. More recently, however, budget cuts and funding reforms have curtailed the capacity of institutions to chart their own course at a time when it is vital for them to do so (EUA 2014c; Weber 2015).

The following sections examine three instruments and measures and their likely impact on learning and teaching, but are far from being exhaustive.

⁴³ <http://www.studis-online.de/StudInfo/Gebuehren/#meldungen>

⁴⁴ The issue of fees is very complex, particularly in a comparative perspective, and beyond the purpose of this report. For a cogent discussion, cf. Eurydice 2014: 4-8.

⁴⁵ <http://eua.be/define.aspx>

Efficiency measures

In the face of funding difficulties and the realisation that it is necessary to “do more with less”, institutions are introducing efficiency measures such as sharing services (e.g. libraries) with other institutions, changing teaching and academic practices, and restructuring departments or faculties. A number of observers have convincingly noted that it is difficult to assess the long-term impact on quality of these efficiency measures (Hazelkorn and Fritze 2014: 14). It is already clear, however, that efficiency concerns, combined with shifting student interest toward certain subjects, are leading a number of institutions to close down low recruiting departments or to merge them into larger entities. Some national associations of universities and national authorities are starting to pay attention to this phenomenon, which could put the future of many important academic disciplines at risk (cf. also Section 3.3) (HEFCE 2011; HRK 2007, 2008, 2012; Blaise, Mutzenhardt, and Roussel 2014).

Funding concentration schemes

A small number of funding concentration schemes reward excellence based on a range of criteria (EUA 2014e). However, research indicators are prominent in these initiatives. Very few include criteria related to teaching,⁴⁶ and there are only a small number of teaching-excellence initiatives.⁴⁷

Wespe, Orr and Jaeger (2013) observe that – as opposed to research initiatives that are based on well-established criteria – “teaching initiatives have a more explorative character: they are expected to help clarify what excellent teaching is all about in the first place” and – importantly – they have a multiplier effect.⁴⁸ The authors caution that if the lack of agreement on how to measure teaching quality persists, this would preserve the pre-eminence of research as the determinant of quality in higher education (Wespe *et al.* 2013).

In addition, these excellence schemes might have the unintended consequence of reinforcing intra-European academic mobility patterns. Marijk van derWende (2015) argues that the strongest academic hubs are attracting academics from across Europe resulting in “a concentration of the minds”. This is particularly true in engineering, natural and life sciences and medicine.

Regional alliances and institutional mergers

Regional alliances and mergers have been important developments that are usually promoted in order to strengthen the competitiveness of a region and that of its higher education institutions.⁴⁹ By grouping different types of higher education institutions, they can preserve a university model that values the link between research and teaching – albeit as a regional cluster rather than a single institution. Given the rapid developments in this area, the 2015 Trends questionnaire sought to test its importance. The results are as follows:

⁴⁶ Wespe, Orr and Jaeger (2013) list the following exceptions in Europe: “Spain’s International Campus of Excellence initiative (excellence in research and in teaching are weighted equally high); Ireland’s Program for Research in Third-Level Institutions (impact on teaching and learning is one of four major assessment criteria); ... and Germany’s Excellence Initiative (effects of research on teaching are one criterion among 15 different criteria).”

⁴⁷ Ibid. The article mentions Finland’s Centres of Excellence in University Education scheme, France’s Initiatives d’excellence en formations innovantes (IDEFI excellence initiatives in innovative teaching), Germany’s Exzellente Lehre scheme (excellent teaching) and the United Kingdom’s Centres for Excellence in Teaching and Learning Programme, which were active between 2005 and 2010 and supported 74 centres of teaching and learning development at British universities. For an evaluation of IDEFI, cf. <http://www.agence-nationale-recherche.fr/fileadmin/documents/2014/ANR-rapport-IDEFI-suivi-2013-2014.pdf>

⁴⁸ As an example, since the launch of the French teaching-excellence initiative (IDEFI), the conversation about teaching innovation has intensified across the country.

⁴⁹ A recently published book that presents case studies of mergers, cf. Curaj, A., L. Georghiu, J. Cassingena Harper and E. Egron-Polak (eds) (2014). The EUA’s DEFINE project will publish a report on the topic in 2015.

- “Collaboration within your region (with other universities, communities, employers)” was scored as highly important by 58% across the sample; the highest scores are associated with an above average number of joint degrees within a given country (with the exception of Ukraine). In addition, 12% more institutions expect regional cooperation to grow in the medium term.
- Similarly, the percentage of institutions which consider that cooperation with industry was highly important went up from 43% in 2010 to 53% in 2015 and is expected to grow by 16% in the medium term.

These developments reflect the added emphasis in many countries of putting higher education and research at the centre of economic planning and development. They often have the ambition of ensuring that students can transfer between different types of higher education institutions. They provide them with internships and work placement opportunities and encourage closer links with employers, including for curricular development. Regional collaboration also results from the acknowledgment that universities can contribute to solving a range of societal problems through various partnerships.

2.4 Summary of key trends

It is clear that coordinated, European-wide responses, such as through the Bologna Process, yield consistent developments across the continent, even if not all objectives have been achieved and national and institutional differences across the EHEA remain.

The results of *Trends 2015* have confirmed one of the main findings of *Trends 2010*: quality assurance has been the most important change driver. Over the past 15 years we have witnessed the quick development of internal quality assurance processes. External quality assurance is changing to take into account these developments and students are increasingly involved in both internal and external quality assurance processes. Significantly, the E4 Group, which includes student representatives, the higher education institutions and the quality assurance agencies, has played an important role in these developments.

By contrast, the Trends responses reveal progress but also gaps between policy objectives and institutional realities in other areas, and raise issues regarding subsidiarity. This is particularly true of national qualifications frameworks that may have fallen short of broadly engaging the academic community, although response from institutional leadership in a number of countries indicate a far higher awareness and use than is commonly assumed. Similarly, joint programmes have been the focus of attention of the Bologna Follow-Up Group that made a proposal to simplify their quality assurance. This is welcome, but the universities are mostly concerned about anchoring these programmes institutionally and making them sustainable.

The results of the 2015 Trends questionnaire concerning credit recognition show that the institutions are doing their best to ensure a fair process but that this issue remains an enduring obstacle to mobility. The ESG-Part I reinforces the institutions’ responsibilities in this respect, and the work of the Pathfinder Group on Automatic Recognition will usefully remind all stakeholders of agreed recognition principles.

Cross-border quality assurance activities are increasing and are a manifestation of both the quality assurance agencies' and the universities' international aspirations as well as the wish of the institutions to be evaluated in different ways. As compared to the other issues mentioned above, quality assurance shows that the actors (institutions and agencies) are ahead of the policy makers as indicated by the lack of progress in legal frameworks allowing institutions to choose any quality assurance agency that is listed in EQAR since the Bucharest Communiqué in 2012.

Notwithstanding these gaps, the perception of the EHEA has improved across Europe during the past five years. However, commitment can disappear quickly and positive trends can be reversed with policies that are not fully embraced by the institutions.

By contrast to the discussion within the EHEA, the national policy agenda has remained very active since the turn of the 21st century but with far greater differences across countries than was the case ten years ago when the policy agenda was more consistent across Europe, and the European Commission had a strong voice in promoting "the modernisation agenda of universities".

The new programmes Erasmus+ and Horizon 2020 were conceived to contribute to the EU2020 goals, particularly in the context of the two flagship initiatives, the Innovation Union and New skills for New Jobs. It remains to be seen how higher education and research, and more specifically universities, will find a place in the context of, and be able to contribute to, the 10 priorities chosen by the European Commission under President Juncker. Specifically, how will the new priorities translate into concrete steps such as support for digital innovation and internationalisation of higher education and for the further development of the EHEA? While the EC does not have the competence to take decisions on the future of European higher education, the policy positions it advocates and the specific actions it launches send important signals to member states and higher education institutions. Such initiatives are of crucial importance at a time when national higher education reform processes do not always relate easily to shared European policy agendas, either because these are yet to be developed (digitalisation), or cannot be achieved within the present policy frameworks (funding). A stronger push for shared European policies would also send a strong signal towards partners outside of the EHEA that Europe is responding proactively to the changing environment.

The most frequent national reform today is about funding but there is a great variety in the way this is introduced. The financial and economic crises have had a profound effect on many higher education systems, including those least affected economically. With budgets being tight, governments are finding new ways of distributing their limited funding such as targeted and performance funding or excellence initiatives and there is pressure on institutions to do more with less, and diversify their funding sources. In the crucial area of funding instruments, there appear to be few shared policies, and thus no European dimension (i.e. agreed principles). This has the potential of further increasing regional disparity within Europe, particularly in the context of imbalanced intra-European academic mobility.

Universities in many countries were given more autonomy during the first decade of the 21st century. Although the scope of autonomy is respected, less funding and additional reporting requirements that are built into the funding instruments often increase the importance of institutional bureaucracies, limit the capacity of institutions to chart their own course and erode collegial decision-making.

To an extent, the incentives provided to promote regional clustering and alliances are ways of dealing with inequalities across Europe by ensuring the academic visibility of a regional group of institutions. They can provide students with greater access to a range of higher education institutions as well as internships and work placement opportunities with industry. This is a very dynamic area that will require close monitoring to identify the risks, success and obstacle factors.

PART III:

Institutional strategies and the changing student population

An important policy priority of the past five years has been to increase access and participation in higher education in the context of diminishing resources. Ensuring the employability of graduates has also become a pivotal policy goal. This priority reflects the new economic reality, whether it is about responding to the economic crisis, addressing high levels of youth unemployment rates, tackling the requirements of the knowledge society or facing a combination of all three challenges.

Thus, the European Union set a target for at least 40% of the population of the 30-34 year-olds to be educated at degree level by 2020. According to Eurostat (2014), 12 member states had already achieved this level in 2012 while the European average was about 36%. A recent Eurydice report on adult education notes, however, that while young adults are better educated than their parents, only a quarter of adults (25-64) in the European Union have completed lower secondary education and that southern European countries are most affected by low educational attainment (European Commission/EACEA/Eurydice 2015a).

OECD (2015b) confirms that “between 2000 and 2012, the proportion of young adults (25-34 year-olds) with a tertiary qualification has grown by more than 3% per year on average in OECD countries” and that “across 24 national and sub-national entities participating in the OECD Survey of Adult Skills, 39% of adults have achieved a higher level of education than their parents.” OECD notes that “a 20-34 year-old with tertiary educated parents is 4.5 times more likely to participate in tertiary education than a young adult whose parents did not have a tertiary qualification.”

In addition, Eurostat data reveals that, as in many other parts of the world, gender imbalance of enrolled students is growing: women outnumber men across all other member states with the exception of a few countries (Austria, Germany, Luxembourg and Romania). The widest gaps are found in Estonia (50% of women vs. 28% of men of an age cohort), Latvia (48% vs. 26%), Slovenia (50% vs. 30%) and Denmark (53% vs. 34%). However, these data hide important differences by fields. Women tend to congregate in the social sciences, economics and business studies; they constitute 80% of graduates from teachers’ training colleges and only 27% in engineering. Unsurprisingly, this has an impact on their long-term earning power (Eurostat 2014).

Many countries in Europe have been interested in broadening participation and access to higher education through special measures targeting mature and part-time learners, students with disabilities, etc. Incentives have been used, such as specific financial support to students or performance-based funding to institutions, which could be linked to the employability of their graduates and therefore the assumed quality of their study programmes.

According to the 2014 Eurydice report on access, retention and employability, of the 27 member states included in the study, only a few have “defined attainment targets for specified groups”. They include the Flemish Community of Belgium, Finland, France, Ireland, Lithuania, Malta, and the United Kingdom (England and Scotland). Estonia and Slovenia are also mentioned: the former because it has an access policy but without specific targets and the latter because it intends to develop such a policy (European Commission/EACEA/Eurydice 2014: 16-17).

Unsurprisingly, the student population is changing as a result of access policies, the stress on employability and the strategic response of the higher education institutions. In some countries, these efforts are taking place against the backdrop of negative demographic and economic trends as was discussed in Part I.

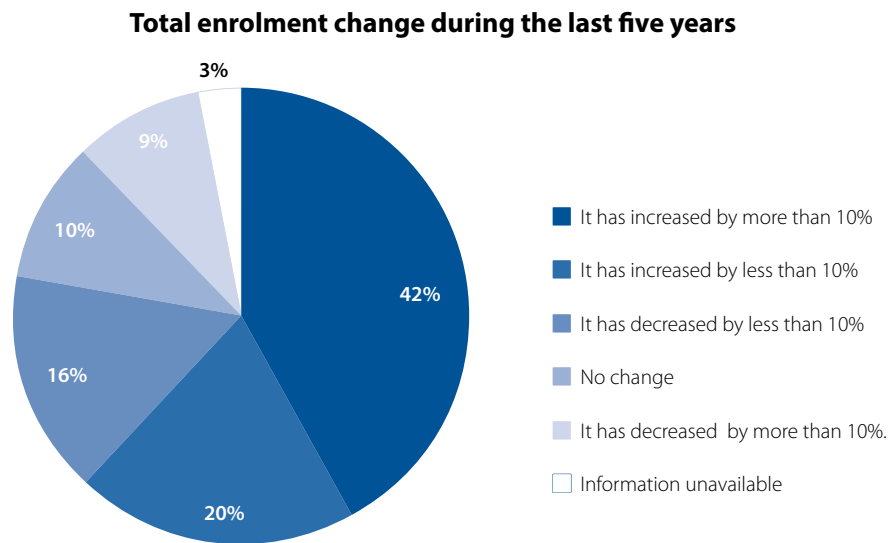
The Trends 2015 questionnaire sought to measure the changes in the size and composition of the student population and to capture the perceptions of the institutions regarding the external (e.g. demography, economy, national policies) and internal change drivers (institutional strategies).

From the responses to the questionnaire it appears that while institutions are able to report on the changing size of the student population, it is far more difficult to capture its socio-economic characteristics and how it is changing. This is mirrored in the approaches of national authorities. Thus, a 2014 Eurydice report notes that “it is now rare to find examples of countries that do not monitor a range of characteristics of the student body” but “there is considerable variation in which characteristics of the student body are monitored and at what stages during the higher education process.” The most frequent element monitored concerns the qualifications prior to higher education. The report observes that the data collected are often not fully exploited and that 19 countries were unable to report on changes to the student population in the last ten years, beyond stating that it has decreased or increased. Furthermore, only two quality assurance agencies (in Estonia and Switzerland) monitor issues related to equity of access (European Commission/EACEA/Eurydice 2014: 17-20).

3.1 The changing size of the student population

Starting with the size of the student population, the Trends questionnaire asked “how has the total enrolment at your institution changed in the last five years?” The results show that for 62% of respondents the number of students has grown in the past five years and that for 42% “it has increased by more than 10%”⁵⁰ (Cf. Figure 11).

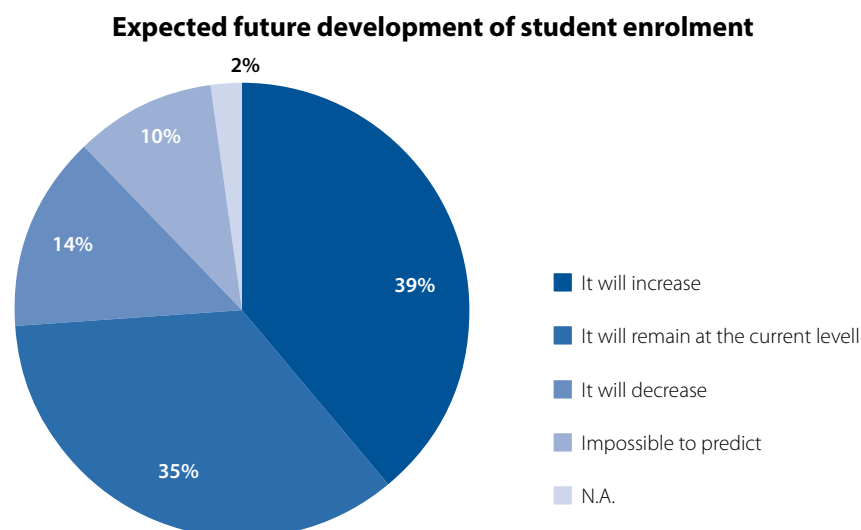
Figure 11: How has the total enrolment at your institution changed during the last five years? (Q18)



By and large, enrolment changes are not correlated with institutional size but distributed more or less evenly across the respondents. However, there is a tendency, although this is weak, of larger institutions reporting an increase, while mid-size institutions provide mixed responses (i.e. some report an increase and others a decrease) and small institutions tend to report no change.

When asked "How do you expect enrolment at your institution to develop in the future?" (cf. Figure 12): 39% expect it to increase; 35% assume that it will remain the same; 14% anticipate a decrease; and a relatively significant number (10%) cannot predict.

Figure 12: How do you expect enrolment at your institution to develop in the future? (Q20)



Institutional size and country location seem to affect these responses:

- Consistent with the discussion in Part I, institutions in central and eastern Europe are more likely to anticipate a decrease in student numbers in the future. Thus, institutions located in the Czech Republic, Lithuania and Poland are among the 14% that anticipate a decrease.

- Institutions located in Belgium (63%), Turkey (87%) and Switzerland (67%) expect an increase and none of them anticipate a decrease. The latter is also the case in Greece and Norway.
- Small institutions are less likely to think that their enrolment will decrease in future as compared to those institutions that enrol 7500 or more students. The reasons for this difference are unclear.

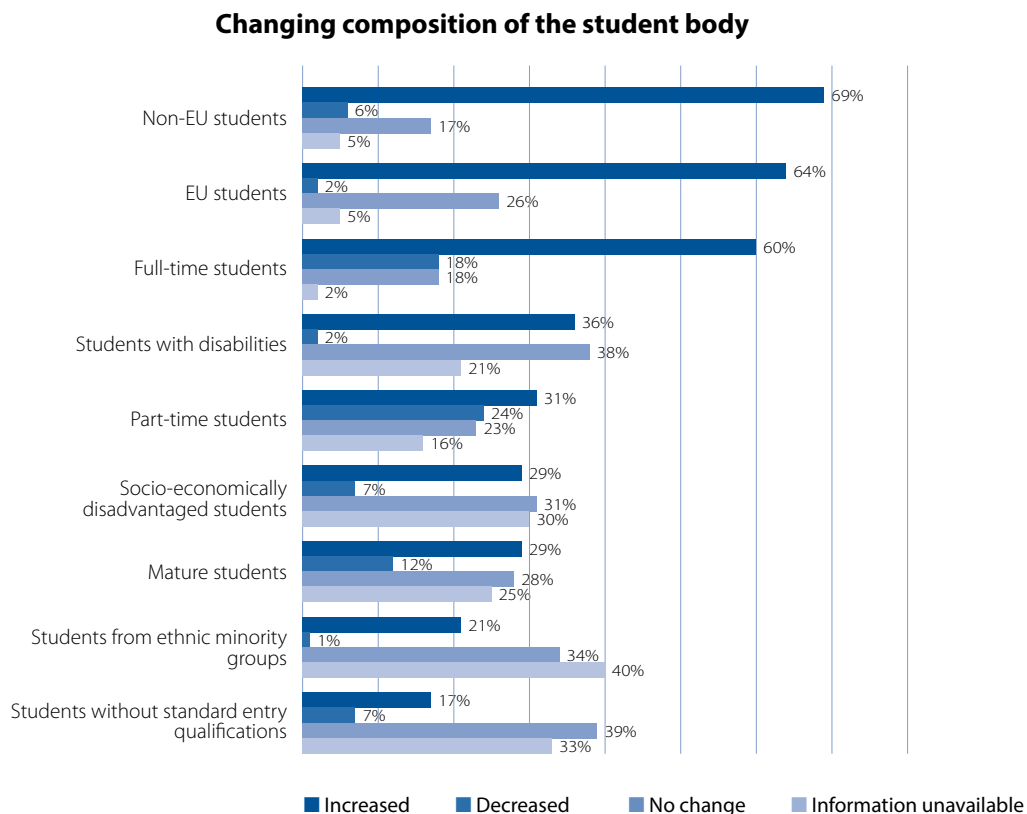
3.2 The changing composition of the student body⁵¹

As noted above, 62% of respondents indicate an increase in the number of students during the last five years. This concerns all degree levels but not all countries equally. Thus:

- Across all three cycles, the largest enrolment gains are found in Belgium, Denmark, Norway, Switzerland and Turkey; smaller but still significant growth is expected in Austria, France, Germany, the Russian Federation and Ukraine. The largest decreases are found in the Czech Republic, Lithuania, and Slovakia.
- A decrease at the Bachelor level is indicated by institutions located in the Czech Republic, Italy, Latvia, Lithuania, Portugal and Slovakia.
- The most important decreases at the Master level are found in Hungary and Slovakia.
- 49% of institutions indicate an increase at the doctoral level, particularly those located in Belgium, Denmark, Hungary, Norway, Poland, Portugal, Romania, Switzerland, Turkey, Ukraine, and the United Kingdom. In some cases, this is related to stricter requirements for academic staff to hold doctoral qualifications.
- The most important decreases at the doctoral level are found in the Czech Republic and Lithuania.

Furthermore, the growth of full-time students (60%) is double than that of part-time students (31%). It should be noted, however, that over a quarter of institutions do not collect information on the number of students who are working while studying. This is confirmed by other studies that have indicated that many full-time students are *de facto* part-time, due to work or other types of obligations. Importantly, the definitions of part-time students vary a great deal across Europe. This makes country comparisons somewhat difficult (e.g. European Commission/EACEA/Eurydice 2014: 44-49).

Figure 13: How has the composition of the student body in your institution changed over the last five years? (Q21)



Aside from these changes, the student population is characterised by a greater diversity of backgrounds. As shown in Figure 13, the growth of international students, both EU and non-EU, is the most frequent change that has occurred, notably in Austria, Ireland, Lithuania, the Netherlands, Norway, Poland, Portugal, Switzerland and Turkey. Two observations are to be made:

- There are almost as many institutions reporting an increase in the number of non-EU students as there are reporting growth in the number of EU students. In other words, 84% reported an increase in both categories: EU and non-EU.⁵²
- Recruitment of international non-EU students may be linked to the possibility of charging higher fees for non-EU students, but only partly. Many institutions in countries without such fee differentials still recruit non-EU international students.

⁵² Given the way the question was framed, institutions could report on either credit- or degree-mobile students or both. In addition, depending on whether a country is in or outside the EU, the question of whether an institution receives EU or non-EU students may have different meanings. There are also differences in how immigrants (non-national students with long-term residency) are counted: some countries count them as international and others do not.

Increase in the numbers of EU and non-EU international students

- 69% of institutions indicate an increase in the number of non-EU students. This growth concerns particularly 90% of respondents in Austria, 88% in Belgium, the Czech Republic and Finland, 100% in Ireland, 83% in Lithuania, 75% in the Netherlands, 90% in Norway, 83% in Poland, 86% in Portugal, 74% in the Russian Federation, 100% in Switzerland, 92% in Turkey and 87% in the United Kingdom.
- 64% institutions report an increase in the number of EU students, notably 90% in Austria, 75% in Belgium, 86% in Denmark, 76% in Germany, 86% in Hungary, 71% in Ireland, 83% in Lithuania, 78% in the Netherlands, 80% in Norway, 77% in Poland, 79% in Portugal, 75% in Romania, 77% in Spain, 100% in Switzerland and 73% in Turkey.

Apart from growth in international enrolments, institutions report an increase in the number of students with disabilities, mature students, students from socio-economically disadvantaged groups and from ethnic minorities, as well as students without standard entry qualifications. It should be noted, however, that definitions of students with disabilities, mature students, etc., vary across Europe and that the percentage of Trends respondents who state that “information is not available” in relation to these socio-economic characteristics range between 20% and 40%.

A growing diversity among students

- Overall, 40% of respondents rate “widening access and participation” as highly important, notably in Ireland, Turkey and the United Kingdom.
- 36% of institutions mention growth in the enrolment of students with disabilities. This trend concerns more specifically 63% of institutions in Belgium, 50% in the Czech Republic, 67% in France, 57% in Hungary, 71% in Ireland, 50% in Lithuania, 64% in Poland, 64% in Sweden, 57% in Turkey and 67% in the United Kingdom.
- 29% of institutions note an increase in mature students. This is particularly the case for 50% of institutions in Belgium, 37% in Finland, 47% in France, 43% in Hungary, 71% in Ireland, 54% in Norway, 63% in Portugal, 48% in Spain and 53% in Turkey.
- 29% of institutions mention increased access of students from socio-economically disadvantaged backgrounds. This is particularly the case in Belgium for 50% of institutions, 78% in France, 50% in Greece, 86% in Ireland and 73% in the United Kingdom.
- 21% report an increase of students from ethnic minority groups. This information cannot be legally collected in many countries. Thus, 40% responded that such information is unavailable. The top four countries with institutions reporting such increases are Belgium (50%), Ireland (43%), Finland (50%) and the United Kingdom (66%).
- The group of students without standard entry qualifications has grown for 17% of institutions (Figure Q21). This growth is driven by institutions in Germany (67%) and Ireland (57%). A further 39% of institutions across the sample mention no change and 33% state that such information is not available.⁵³

⁵³ These percentages cannot be reconciled with the information collected through Q56. The responses show that the recognition of prior learning (RPL) is part of an alternative entry route provided by 46% of institutions and “a way of gaining credits which count toward a study programme” for 61%. Only 14% of institutions do not have a process in place to recognise prior learning while, at the other end of the spectrum, 19% are able to award a full degree on the basis of RPL (Q56). Institutions in France, Germany, Italy, Spain and Turkey were most likely to engage in RPL (although the 2015 Bologna Implementation Report states that Turkish institutions are not permitted to do this (European Commission/EACEA/Eurydice 2015b)).

The changes in the composition of the student body are linked in great part to institutional outreach efforts as discussed below. However, there are also external factors that impinge on the characteristics of the student population. The perceptions of higher education institutions on these change drivers are examined in the following sections, starting with the external drivers.

3.3 External drivers affecting the characteristics of the student body

As discussed in Part I, the economic crisis demographics loom large among the external factors affecting higher education. While the impact of the economic crisis has been deeply felt, particularly in the eastern and southern parts of Europe, about a third of the institutions indicate that employment opportunities have increased since 2010 for both Bachelor (27%) and Master degree holders (33%). This justifies the emphasis that the European Commission and OECD are placing on increasing the level of participation in higher education.

The questionnaire sought to measure more precisely the link between opportunities (or lack of opportunities) in the labour market and enrolment trends; in other words, is there enrolment growth when unemployment is high? The results show that the link between the two is non-linear and context-sensitive and, therefore, difficult to assess through the responses to a questionnaire.

A sharper and more definite trend, however, is the shift in students' interests toward professional degrees. Thus, 38% of institutions report a growing preference for studies leading to a professional degree (e.g. business, engineering, law, etc.).

Percentage of institutions reporting students' preference for professional studies

- 65% in France
- 50% in Greece
- 43% in Hungary
- 41% in Ireland
- 44% in Italy
- 50% in Latvia
- 70% in Norway
- 57% in Portugal
- 73% in the Russian Federation
- 46% in Spain
- 57% in Sweden
- 68% in Turkey
- 57% in Ukraine

The mix of countries shows that this shift is not only linked to the economic crisis or to unemployment patterns but could reflect several factors: a growing policy emphasis on linking education and employment;⁵⁴ the possible influence of international students' choice for professional degrees; socio-economic background and whether and how it correlates with anxiety about the link between higher education and employment; how these factors pan out in different national contexts.

As mentioned earlier (Section 2.3.2), the shift in students' interests is threatening the survival of some disciplines (such as some languages and some fields in the natural and life sciences, the social sciences and the humanities) or transforming them into 'professional' degrees (e.g. in the United Kingdom, some anthropology departments are included in tourism and plant biology in horticulture). So far, there has been no systematic European data collection on this topic but it is emerging as an important issue to be addressed.

In 2015, a growing number of institutions express concerns about demography as compared to 2010, when it was of high importance to a smaller percentage of respondents (26%). Today, the percentage has grown to 32% and nearly 51% think that it will be of high importance in the medium term. Those institutions experiencing shrinking enrolments were asked about the reasons for the changes in enrolment numbers. They attribute it to demographic change (55%) – most notably in Hungary, Latvia, Lithuania, Portugal and Romania (100%) – or to the financial situation of students and their families (38%), especially in Italy (77%), Latvia (75%), Portugal (100%), Slovakia (67%) and Spain (91%).

Unsurprisingly, most countries where more than 50% of institutions rate the demographic decline as being highly important also saw a significant decrease in both full- and part-time enrolments. The exceptions are:

- Poland, where the decrease in full-time enrolment was reported by only 20% of the Trends respondents even though the demographic decline is important, thus substantiating the observation that not all institutions are affected equally.
- Italy, where 41% of institutions reported decreases in enrolment but where the national demographic trend was considered to be of low importance.
- Institutions in both the Netherlands and the United Kingdom⁵⁵ indicate that demographic change had low importance but the decrease of part-time students was comparatively high (for 67% and 40% of institutions respectively).

It is beyond the scope of this study to propose definitive interpretations of these three findings, which are linked to specific economic situations and other contextual factors.

Furthermore, the comparison with Eurostat demographic data for the period 2002-2013 reveals that while more than half of the respondents located in countries with negative population growth (either recently or in the past 10 years) attribute the enrolment decrease to this factor, the institutions located in countries with positive demographic trends do not attribute enrolment

⁵⁴ Perhaps the most surprising attempt at engineering a shift in student interests is occurring in Denmark where the government decided to limit enrolments in certain fields because of their perceived weak links to employment (Myklebust 2014).

⁵⁵ The figures of the UK Higher Education Statistics Agency (HESA) show a decline in part-time enrolments across all four UK regions (<https://www.hesa.ac.uk/sfr210#tables>). Between 2009/10 and 2013/14 total part-time student numbers have decreased from nearly 900 000 to under 600 000. Even the UK Open University lost 28% of its part-time students in the past five years (Parr 2015).

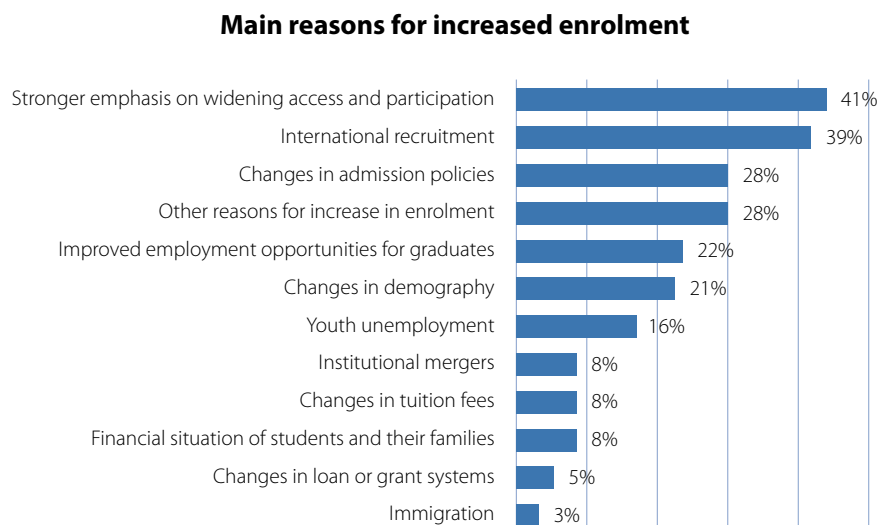
increases to positive population trends. This means that other factors are present to promote greater participation rates. They include targeted institutional strategies, government priorities and student behaviour.

As Figure 14 shows, the three main reasons for increases in enrolment are attributed to:

- Widening participation (41%), particularly in Belgium (63%), Ireland (67%), Portugal (71%), Romania (80%) and Ukraine (83%);
- International recruitments (nearly 39%), notably in Denmark (100%), the Netherlands (86%) and the United Kingdom (92%);
- “Changes to admission policies” (28%), especially in Greece (71%), Turkey (44%), Ireland (50%) and the United Kingdom (46%).

Apart from 33% of institutions in Switzerland, everywhere else immigration receives the lowest value at 3%. This may very well be linked to legal requirements that do not allow such type of reporting.

Figure 14: If enrolment has increased, what have been the main reasons? (Q19.1)



Nearly 28% of respondents ticked “other reasons” for enrolment increases. Their answers could be grouped into three broad categories:

- Government policies, including increased or decreased funding, changes related to military service or secondary education, public transport and changes from college to university status.
- The growing societal interest in higher education and learning in general, including in lifelong learning.
- Actions taken by institutions, such as improving and extending the educational offer, including introducing multilingual courses and blended learning, increasing the attractiveness of the institution and extending its outreach.

3.4 Institutional outreach increases the diversity of the students

The interplay of several factors prompts institutions to develop recruitment and outreach strategies in response to societal needs, governmental policies and their own strategic aspirations.

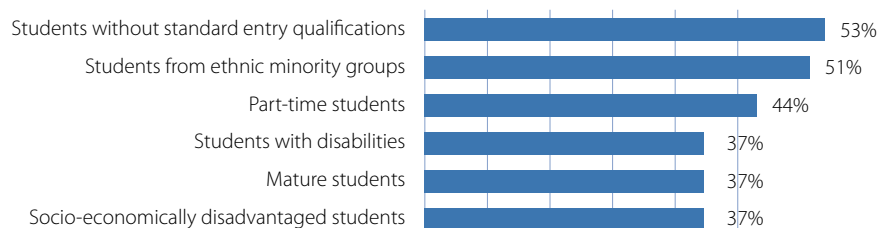
This is confirmed by the answers to Q22 (“Does your institution have targeted strategies to attract the following student groups?”) showing that the changes in the composition of the student body have been part and parcel of institutional outreach strategies. This is, strikingly, the case for international recruitment where 83% and 81% of institutions target non-EU and EU students, respectively.

Students with disabilities (49%) and socio-economically disadvantaged students (48%) form the next target groups, followed by mature students (45%) and part-time students (44%). The category of students without standard entry qualifications is a target for 27% of institutions. These are very encouraging trends that demonstrate that a number of institutions are committed to widening access.

It should be noted, however, that these percentages are below 50%. Thus, there are a relatively large number of institutions that do not have targeted recruitment strategies to widen access (Figure 15). Apart from the difficulties in targeting certain groups in some countries (e.g. ethnic minorities), this may indicate that there remain untapped reservoirs of potential students who could benefit from higher education.

Figure 15: Does your institution have targeted strategies to attract the following student groups? (“No strategies”) (Q22)

Institutions with no strategy for recruiting specific groups of students



Do the institutions stating that they have recruitment strategies tend to be those located in countries experiencing a demographic decline or the economic crisis?

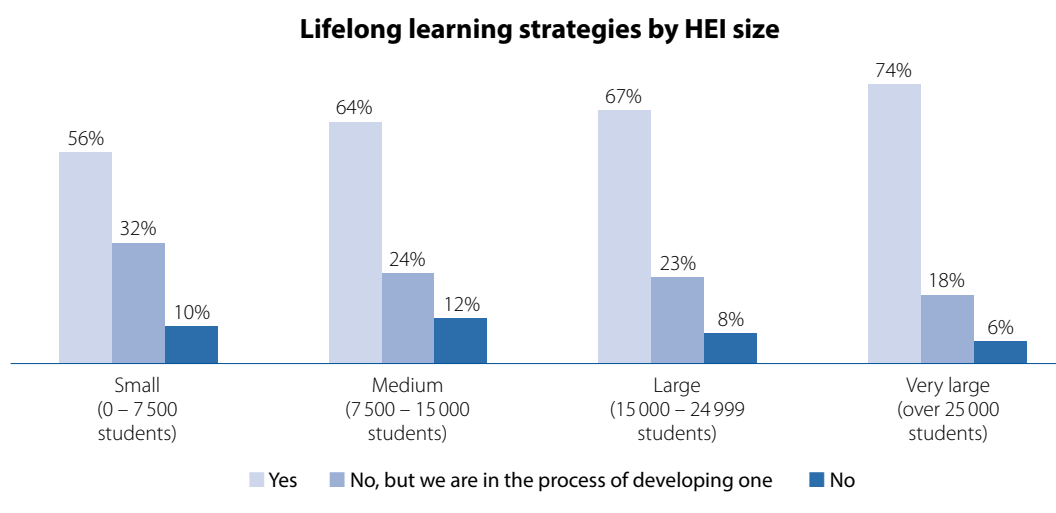
- Institutions in countries affected by the economic crisis are not more strategic in attracting specific types of students (they are within 10% of the total average).
- Institutions in countries experiencing a demographic decline are slightly more strategic in attracting specific types of students, especially part-time (55% vs. 44% of total respondents) and mature students (54% vs. 45%).

Apart from initiatives targeting specific student categories, there are also institutional strategies aimed at increasing access via the lifelong learning path. In 2010, 39% of institutions responding

to *Trends 2010* had a strategy in place and a further 34% were in the process of developing one (EUA 2010: 67).

Today, lifelong learning strategies are in place in 65% of institutions and in the planning stage for a further 24%; 9% indicate that they are not planning one, 1% answered “other” (Figure 16). Thus, since 2010, there has been a strong progression in the number of institutions with lifelong learning strategies.

Figure 16: Lifelong learning strategies (Q23) by institutional size (Q6)



These strategies are most likely found in institutions with over 25 000 students and more likely to be located in France (100%), Romania (83%), Slovakia (89%) and Turkey (89%). Those responding that they did not have a lifelong learning strategy were more likely to be found in Denmark (43%), Sweden (29%) and the United Kingdom (33%). These different results may be indicative of different stages in development. Thus, Denmark, Sweden and the United Kingdom are three countries with strong lifelong learning traditions. Therefore, lifelong learning strategies are now probably an integral part of institutional strategies rather than separate documents while the results for France, Romania, Slovakia and Turkey might be signalling a new institutional emphasis.

This being said, countries that are experiencing steep decline in part-time numbers might wish to look again at lifelong learning, whether or not they have dedicated strategies.

3.5 Summary of key trends

The new economic reality – the economic crisis, youth unemployment, the requirements of the knowledge society, globalisation – has led to renewed and additional emphasis on increasing student participation at the European and national levels. Although changes to the student body show significant national differences, 42% of the institutions that responded to the Trends questionnaire report an increased participation of over 10%. Increased enrolments are reported for all three cycles, as well as a marked shift towards professional education. This may be linked to greater policy emphasis on and students’ anxiety about employment prospects. Where drops in enrolments occur, they are attributed to demographic change and the students’ financial situation, especially in eastern and southern Europe.

The composition of the student body is changing as a result of institutional strategies, particularly due to the major efforts being undertaken to recruit international students from both EU and non-EU countries. Institutional outreach strategies also aim at increasing diversity, such as recruiting mature students, students with disabilities or from disadvantaged groups, ethnic minorities, and students without standard entry requirements. Nevertheless, it will be important for governments to review the existing frameworks for lifelong learning and for institutions to re-examine their existing lifelong strategies in order to ensure that they fit the specific demographic and economic situation in each country.

PART IV:

Learning and teaching in Europe

Part IV focuses on learning and teaching developments in Europe. It builds on the first three parts of this report and is essentially the core of *Trends 2015*. The following sections seek to analyse the extent to which institutions have set learning and teaching as priorities and are moving towards student-centred learning. This is essential in order to create effective learning environments.

Part IV is primarily based on the responses to the Trends 2015 questionnaire (cf. Appendix 1). To the extent that the questionnaire design considered the *Trends 2010* report's main conclusions as starting points, it is useful to present them first.

4.1 *Trends 2010, the starting point of Trends 2015*

In reviewing the 2000-2010 decade, *Trends 2010* concluded that much has been achieved in Europe over the period and that the Bologna Process provided opportunities to examine and renew the educational offer. It has strengthened the European identity of higher education institutions as well as European cooperation, both at the political and institutional levels.

By 2010, the success of the Bologna Process included the introduction of a three-cycle structure; attention being paid to institutional quality assurance processes and external accountability; the development of a European quality assurance framework; the rapid expansion of doctoral schools and improved supervision and training of doctoral candidates; the further spread in the use of the European credit system (ECTS) and of the Diploma Supplement; the progressive development of national qualifications frameworks and the trend toward curricula defined in learning outcomes.

These achievements were noteworthy but it was also clear that more time was needed to consolidate and strengthen these changes. This can be illustrated with three examples:

- The haste with which three-cycle structures had been introduced in some countries – sometimes in response to a ministerial dictate that it be done within one year – did not always lead to meaningful curricular renewal, but rather to compressed Bachelor degrees that left little flexibility for students and little room for international mobility during the first cycle.

- The use of the diploma supplement had been growing but it seemed to have been relegated to an administrative function and disconnected from new developments such as learning outcomes and qualifications frameworks.
- There had been some successful efforts in some countries to discuss with the National Rectors' Conferences the development of national qualifications frameworks. Where institutions were not involved, they had difficulties understanding the importance of learning outcomes, and of their central role within qualifications frameworks and in facilitating mobility and lifelong learning through the Recognition of Prior Learning (RPL).

Trends 2010 emphasised that the new degree structures and the Bologna tools must be seen as being interconnected, and as a means for moving towards student-centred learning – defined as referring to pedagogies focused on the learner. With this approach, the learning process is not only, or primarily, about transfer of knowledge, but about deeper understanding and critical thinking. This approach views teachers as facilitators who share the responsibility for learning with their students and focus on their autonomy as learners, encouraging them to 'construct' their own meaning through pro-active, independent learning, discovery and reflection. (EUA 2010: 31-32)

However, because the Bologna reforms have evolved through time, a fragmented and instrumental view of education emerged, which did not always facilitate an understanding of the important links between its various elements, or motivate academics to engage meaningfully in curricular renewal. This was clearly the case with the 'early implementers', while 'late implementers' gained a better understanding of the spirit of the reforms.

Trends 2010 concluded that the next phase would need to deepen and consolidate the change process by using the existing architecture, quality infrastructure and the Bologna tools with the goal of providing the educational component necessary for the construction of a Europe of knowledge. The report stressed that this process should be framed by a broad humanistic vision of education that would provide lifelong access to learning and support the professional objectives and the intellectual development of a diversity of learners (cf. also Bergan 2006).

The 2015 Trends questionnaire provided a range of questions to capture these different aspects while focusing on some of the success factors that had been identified in *Trends 2010*, such as academic staff policies, including academic development; the identification of learning outcomes; the use of a national qualifications framework; etc.

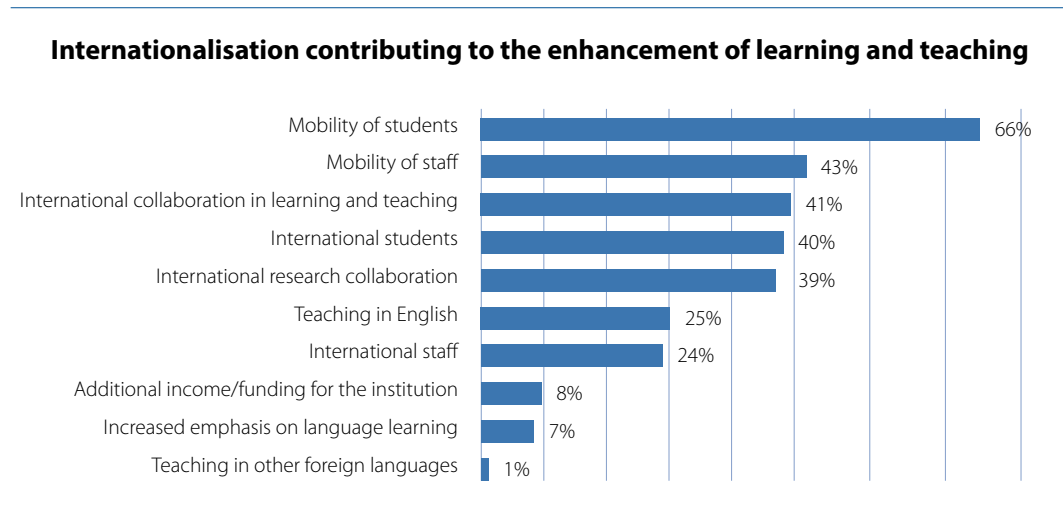
The following sections start with an examination of two aspects that are contributing to changing approaches to learning: internationalisation and e-learning. These were already considered in Part I but in a very broad fashion – that is, as external change drivers for the higher education sector as a whole rather than for their direct impact on learning and teaching. Here, it is their direct link to the learning environment that is examined. Part IV then turns to a discussion of how institutions are supporting students' successes. This includes consideration of changes in teaching approaches and the learning environment, academic staff policies, the promotion of student engagement and tracking students during their lifecycle to monitor their progress and support the widening participation agenda of institutions.

4.2 Impact of internationalisation on learning

As already mentioned, an overwhelming number of institutions (70%) rated internationalisation as the most important development over the past five years and 83% anticipate that it will continue to grow in importance in the medium term (cf. Section 1.2.2). The universities' internationalisation strategies, including their geographical targets, were discussed in Part I and the importance of recruiting EU and non-EU international students in Part II. Part IV concentrates on the perceptions of institutions regarding the impact of internationalisation on the quality of the learning experience.

Institutions were asked if "internationalisation contributes to improving learning and teaching": 92% responded "yes". The main contributors to the improvement process, in their views, are shown in Figure 17.

Figure 17: If internationalisation has contributed to improved learning and teaching (Q48), which of the following features have contributed most to the enhancement of learning and teaching? (Q48.1)



The *IAU Global Survey* complements these findings (2014: 53). It found that the top three benefits for European respondents are improved quality of learning and teaching, enhanced international cooperation and increased international awareness of students. The item "increased/diversified revenue generation" did not appear on any world regions' top three benefits, including in Europe. However, Hazelkorn and Fritze (2014: 14) mention that international student recruitment has become a frequent strategy to cope with the economic crisis by increasing revenues and diversifying funding sources.

In the above list of responses to the Trends questionnaire, institutions have identified three aspects related to 'internationalisation at home': international students, international staff and teaching in English. Institutions that take internationalisation to heart pay a great deal of attention to these aspects, which provide international opportunities for their non-mobile students and staff.

Only 5% of Trends respondents noted that internationalisation had negative effects. They were invited to answer a follow-up, open question. Their answers point to the following important challenges:

- The increased complexity and greater financial uncertainty for the institution: this includes greater bureaucratisation, increased workload for administrative and academic staff and additional pressure on student services.
- The heterogeneous academic, cultural and linguistic background of international students may affect the quality level of programme delivery, particularly if academic staff is resistant to adapt to a diverse classroom.
- Teaching in English can be a challenge to both teachers and students if their mastery of the language is weak. Teaching domestic students in a foreign language can bear a negative influence on their ability to develop the requisite technical and professional vocabulary in their native language.
- The impact on staff can be profound and range from brain drain to a growing gap between the internationalised faculty members (the mobile elite) and those who are not mobile.

Some of these issues point to the difficulties of ‘internationalising at home’. This Trends survey was conducted in spring 2014, before the increased build-up of political and military tensions around the world, which could affect how governments react to internationalisation in higher education. Philip Altbach and Hans de Wit (2015) wrote of the impact of past political tensions or conflicts, such as World War I and the Cold War, on internationalisation. While they stress that “international cooperation and exchange are not guarantees for peace and mutual understanding,” they observe that these “continue to be essential mechanisms for keeping communication open and dialogue active.” The key question in their view is whether “the increasingly widespread global conflicts, based on religious fundamentalism, resurgent nationalism and other challenges, harm the impressive strides that have been made in international higher education cooperation.” This makes it all the more incumbent on higher education institutions to ensure that dialogue and communication occur on their campuses.

4.3 Impact and implications of e-learning

In 2013, the New Media Consortium and the EDUCAUSE Learning Initiative (NMC 2013: 5-6) identified six emerging technologies that were likely to have an impact on higher education in the next five years:

- by 2014, MOOCs and tablet computing;
- by 2016, games and gamification and learning analytics;
- by 2018, 3D printing and wearable technology.

It is in this fast-moving and changing technical environment that the Trends 2015 questionnaire sought to explore e-learning developments in European higher education. The Trends questions on e-learning were a partial repeat of a previous questionnaire conducted on the topic by EUA in 2013 and to which 249 institutions responded (EUA 2014b). The *Trends 2015* responses confirmed the results of the previous study even though the two questionnaires had been answered by different institutional representatives and the institutions were not strictly the same.

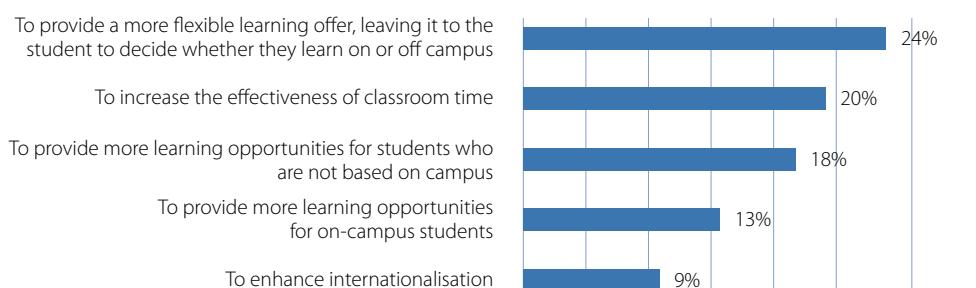
As discussed in Part I, information and communication technology (ICT) has been highly important for 62% of respondents, notably in Greece (75%), Hungary (71%), the Russian Federation (79%),

Slovakia and Spain (67%), Turkey (81%), Ukraine (100%) and the United Kingdom (67%). (These results, while similar on the surface, would need to be interpreted in the context of each country.)

Institutions were asked about their most important objective in developing e-learning (Figure 18). Their top four answers indicate clearly the expectation that e-learning will offer greater flexibility and learning opportunities to students and will improve classroom effectiveness. Other objectives, which focused more narrowly on specific target groups, such as international and adult students, received a very low value because respondents could select only one objective.⁵⁶ These results may indicate that there is still scope for developments that would enable institutions to reach a greater diversity of learners in the future.

Figure 18: What is your institution's most important objective regarding the development of e-learning in the future? (Q44)

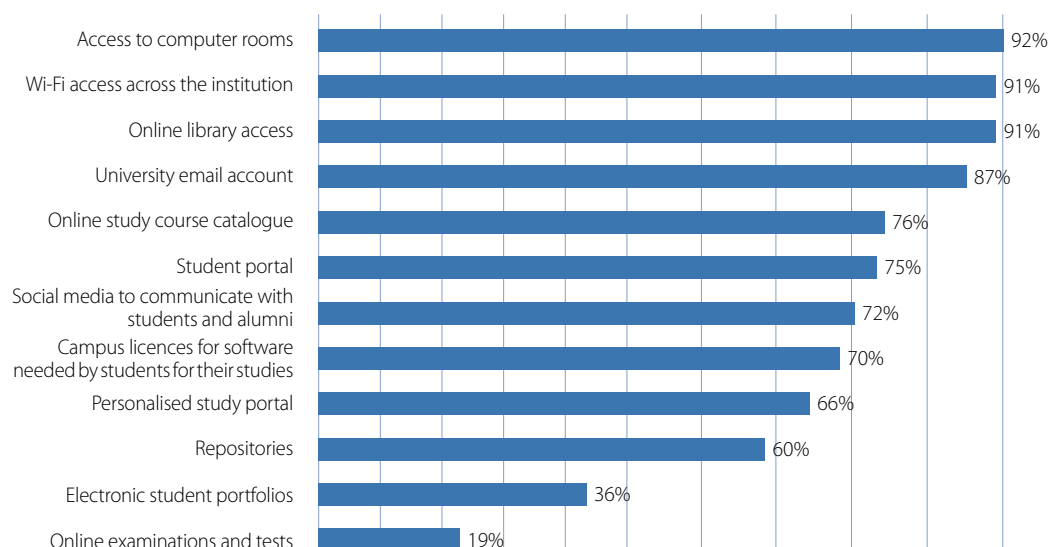
Top five objectives regarding the future development of e-learning



Institutions were asked two questions about the ICT tools that are in place. The answers concerning the systems and tools were homogenous across the sample as captured by Figure 19 that presents the tools offered for "all students".⁵⁷

Figure 19: Which of the following information technology (IT) systems or tools does your institution use or provide for its students? (Q42): "For all students"

IT systems and tools that are offered to all students



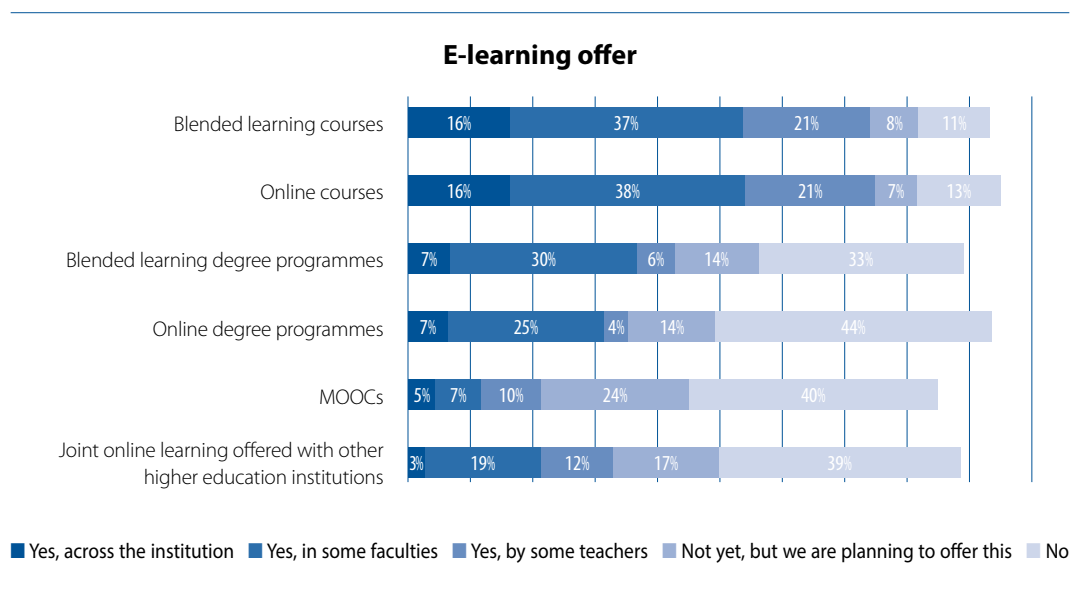
⁵⁶ The option "others" was chosen by 5% of respondents, most of whom had difficulty with the wording of the question which asked them to select their single, "most important objective".

⁵⁷ Institutions were given five choices for each item: "yes, for all students", "yes, for some students", "not yet, but we are planning to provide this", "no" and "information not available".

There are even fewer disparities across the sample when adding those who answered that a specific item is offered to “some students”.⁵⁸ This is the case for the lowest item on the above list: online examinations and tests “offered to all students” represent 19% of respondents, but a further 44% are “offered to some students”. It should be noted that online examinations are not associated with online learning only and can be offered in conjunction with traditional classroom teaching. The EUA e-learning survey, which received very similar answers, concluded therefore that online examinations are an emerging trend (EUA 2014b: 34-35).

In addition, institutions were asked if they offered a number of e-learning activities. The analysis of the answers in Figure 20 shows that, as opposed to the preceding question (Q42), there is great disparity not only across Europe but also within individual institutions. This is because new academic activities seem to be piloted in some faculties, or entrusted to individual teachers, rather than launched across the institution. Further studies would be required to examine whether there are disciplinary differences in this respect.

Figure 20: Does your institution offer any of the following? (Q43)



Only 16% of respondents offered institution-wide online courses and blended-learning courses, while 38% offered them in some faculties and a further 21% by some teachers. About 1% of institutions offered additional e-learning features either at institutional or faculty level, such as, for instance, recorded video lectures and self-study learning packages.

These results indicate that responsibility for teaching innovation is lodged at the faculty or departmental level while the central level is responsible for investment decisions affecting the institution as a whole. This is true for many other activities (cf. Section 4.6) and confirms the analysis of the EUA e-learning survey:

The clear trend towards centralised or shared-responsibility institutional approaches is remarkable, given that faculties or individual teachers often drive e-learning activities. It may be attributable to many of the concerns linked to e-learning. For example, investment in costly technology, legal aspects (e.g. licensing and intellectual property rights) and the validation of learning (in the award of credits and degrees) require coordination by

institutions and decisions taken by their leaders. The trend is consistent with the general one towards more central guidance and oversight in institutions and the shift from faculty- and teacher-driven activities to institutional strategies initiated by their leaders. This has been especially apparent over the past decade in the internationalisation of institutions (EUA 2014b: 40).

Moreover, the scope for developing activities further is considerable. At present a significant percentage of institutions do not offer online degree programmes (44%), MOOCs (40%), joint online learning offered with other higher education institutions (39%) or blended learning programmes (33%).

As was discussed in Part I, MOOCs receive the highest percentage of “not yet, but we are planning to offer this” (24%) followed, albeit distantly, by “joint online learning offered with other higher education institutions” (17%).

When asked about attitudes toward e-learning, institutions acknowledge that e-learning “works well” (40%), that “it changes the approaches to learning and teaching” (68%), and improves its quality (45%). Although it takes time to introduce (63%), and is costly, it is worth the investment (45%). About 20%, however, are “not yet certain about the benefits of e-learning”.

In closing this section, it is important to remember that this area is an important priority for institutions but that learning innovations are but one aspect of the technological revolution. There is a need to reflect on the social and pedagogical implications of social media and the growing importance of the Internet as a source of information. Thus, aside from the development of MOOCs “as alternatives and supplements to traditional university courses”, a report on new technologies identifies how these will change higher education (NMC 2013: 7-8). Far-reaching changes are likely to include:

- “Openness – concepts like open content, open data, and open resources, along with notions of transparency and easy access to data and information – is becoming a value. As authoritative sources lose their importance, there is need for more curation and other forms of validation to generate meaning in information and media.”
- “The workforce demands skills from college graduates that are more often acquired from informal learning experiences than in universities.”
- “There is an increasing interest in using new sources of data for personalizing the learning experience and for performance measurement.”
- “The role of educators continues to change due to the vast resources that are accessible to students via the Internet.”

Technological change and the multiple ways of staying ‘connected’ are part of a wider social change process, with implications for learning and teaching, particularly in redefining learners and teachers and their interactions (peer-to-peer and between the teacher and the learner). In brief, technological developments are affecting the relationship to knowledge and to authoritative sources, including teachers and libraries (cf. for instance, Michel Serres, 2012; ACE 2014).

For higher education, this means, at the very least, that renewed vigilance is required in ensuring that students have the required critical thinking skills to evaluate and analyse the quality,

relevance and validity of the information available on the Internet and elsewhere. It also means exploiting more fully technological advances, the new ways of learning and interacting on- and off-campus and internationally, and the new culture arising from the social media so as to develop creative and inquiring minds among students.

These issues are likely to become increasingly important in the future, also for employers who check the Internet presence of prospective employees and expect them to be astute users of these technologies.

It is also clear that a follow-up study would be useful to show the extent to which new ways of teaching and new modes of delivery take fully into account the new students and the extent to which academic staff are embracing these new technologies, including as a mechanism for professional development. Thus, a study of enrolment patterns in MITx MOOCs showed that 28% of respondents are current or past teachers and that they generate 22% of all comments. Consequently, digital learning also affects teacher-to-teacher interaction. The study suggests ways to harness this potential, including “facilitating educator networks” and “creating opportunities for expert-novice interactions” (Seaton, Coleman, Davies and Chuang 2015).

On the research side, the momentum toward ‘open science’ also suggests that researchers will require new skills and competences for their careers in and out of academia (data mining, management of large databases, etc.) which will have to be developed already at the undergraduate level.

In summary, digital skills are becoming increasingly important in a wide variety of professions, including in the academe, requiring that higher education respond to this new need.

4.4 Changing conceptions of teaching

The two preceding sections have shown that internationalisation and ICT are important priorities in the learning environment. Indeed, when asked which developments have been important to their institution, 70% of respondents mention the former and 62% the latter (Q11). Respondents were asked to consider the importance of the same set of items in the near future. The same ordering of items prevails, albeit with changes in values. Thus, internationalisation and ICT continue to occupy the top two places but with an increase in value: 83% for the former (+13 points) and nearly 78% for the latter (+16 points).

Furthermore, in general, institutional change related to learning and teaching has been highly important for 62% of respondents and “Innovative teaching methods and techniques are being introduced” in 57% of institutions. This is particularly the case in the Czech Republic (69%), Germany (65%), Ireland (100%), Lithuania (67%), the Netherlands (78%), Romania (67%), the Russian Federation (79%), Slovakia (67%), Spain (85%), Ukraine (100%) and the United Kingdom (67%).

It is in the context of a very dynamic environment that this section turns to the ways in which teaching is evolving. It examines aspects of curricular development such as the implementation of learning outcomes, the balance and the links between teaching and research activities, and the engagement of the universities with their external stakeholders to ensure that students are well prepared.

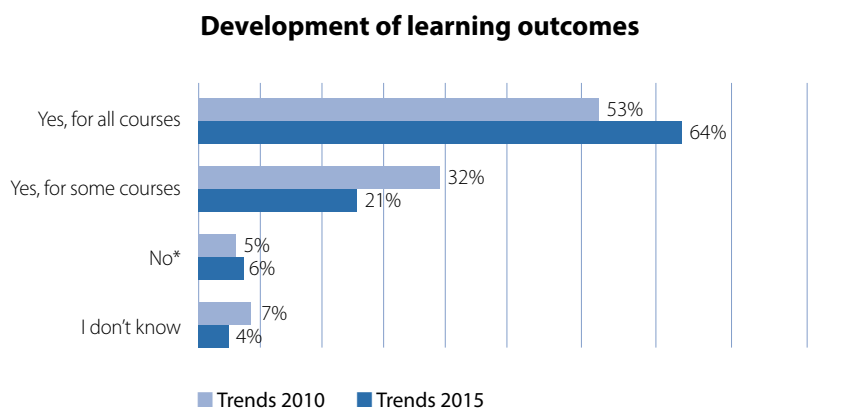
4.4.1 Learning outcomes

Developing and assessing learning outcomes have been major issues in the EHEA and elsewhere in the world. With increased levels of participation in higher education, the associated cost to the public spending, the greater autonomy granted to the institutions and the increased accountability required by New Public Management, national authorities have paid more attention to how institutions can document the learning of their students and ensure their employability.

The learning outcome approach has also been an essential part of the discussion about graduates' employability to the extent that learning outcomes include their individual characteristics (knowledge, skills and competences).⁵⁹ The European and national qualifications frameworks have been devised to provide information about these forms of knowledge, skills and competences at different levels of higher education but, as discussed in Part II (Section 2.1.2) academics – possibly with the exception of the institutional leadership and administration – and the wider public, including employers, have not fully embraced NQFs.

Given the interest of national authorities and policy makers in the EHEA, it is not surprising that the implementation of a learning-outcome approach has been an important development for 60% of institutions. As a result, by 2015, 64% have applied it to all courses and 21% to some courses. This shows a continuing progression since *Trends 2010*, when 53% had applied it to all courses and 32% to some courses as Figure 21 shows.

Figure 21: Development of learning outcomes in 2010 (Q19) and 2015 (Q36)



*Trends 2015 "No": "No, but we intend to" (5%) plus "No" (1%)

The progression is most striking in Denmark, the Netherlands, Sweden and the United Kingdom where 100% of institutions have developed learning outcomes for all courses. In other countries, at least 75% of institutions have done so: Belgium, Ireland, Lithuania, Norway, Poland, Slovakia and Spain. The rest of the respondents, apart from rare exceptions, indicate that this is under development.

⁵⁹ A recent study observes that policy conceptualisations of employability stand on a continuum from individual responsibility to ascribing it to external factors such as the available job supply. Sin, Tavares and Amaral (2014) show that younger students in Portugal tend to take full responsibility for their success in finding employment while older learners will take into account contextual factors such as the available demand from employers. Career guidance services would be well advised to take these generational differences into account.

The handful of respondents (6%) who answered that they had not yet implemented learning outcomes (Figure 21) were asked to provide reasons for this. Some are waiting for legal changes and some others mention that academic staff had a poor understanding of the approach.

Those who responded “yes” to the introduction of learning outcomes were asked to rate their effects on a four-point scale. When the positive answers are aggregated (strongly agree/agree), the results tend to be very positive:

- Course contents have been revised for 79%
- The overall quality of teaching has improved for 74%
- Students are more aware of their learning objectives for 72%
- Course duplication has been reduced for 66%
- Recognition of credits and degrees from other institutions and for prior learning has become easier for 65% and 58%, respectively
- Cooperation among staff has improved for 64%
- Teaching methods have been changed for 64%
- Learning paths have become more flexible for 61%

Although examinations have been revised (67%), a smaller percentage of institutions report that student pass rates have improved (46%), most notably in Finland, France, Germany, Greece, Hungary, Italy, Lithuania, Latvia, the Netherlands, Poland, Romania, Slovakia, Spain, Turkey, Ukraine and the United Kingdom.

Table 4 shows the countries where the percentage of those who disagree that learning outcomes have brought benefits is at least 20% above these European averages. In particular, institutions in Austria and Norway seem to have less confidence in this reform as compared to institutions in other countries.⁶⁰

⁶⁰ These are the percentages of institutions that disagree with a range of statements. In order to make the table easier to read, the word “not” has been added to all the statements. As an example, the original wording of the first statement was “course duplication has been reduced”.

Table 4: Percentages of institutions that evaluate the effects of a learning outcome approach negatively (Q36.1)

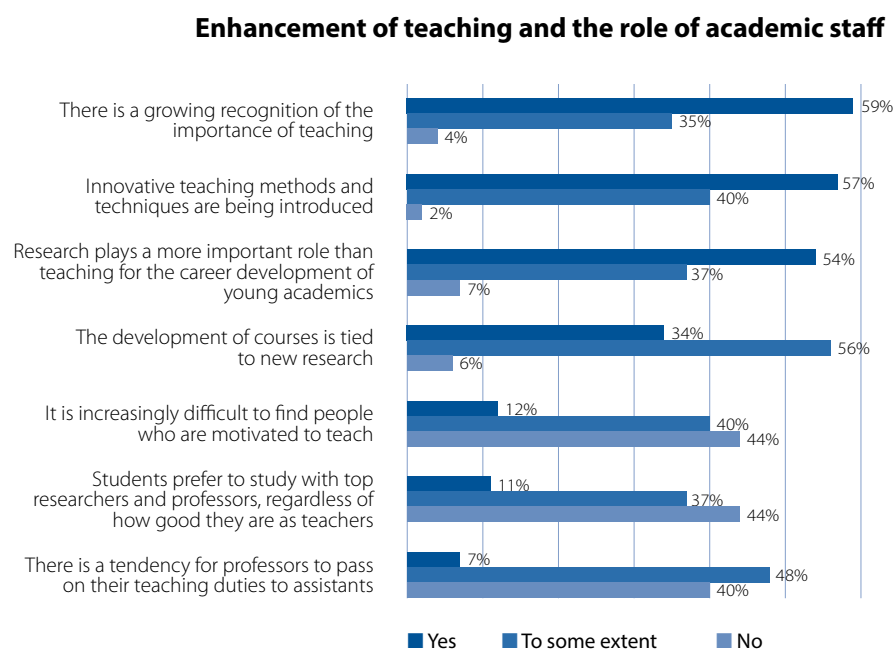
Country	Learning outcomes developed for all/ some courses	Perceived effects of learning outcomes
Austria	70% / 30%	Course duplication has not been reduced (60%) Recognition of credits and degrees from other institutions has not become easier (40%) Cooperation among staff has not improved (40%) Teaching methods have not been changed (60%) Learning paths have not become more flexible (60%) Student pass rates have not improved (86%) Recognition of prior learning has not become easier (67%)
Belgium	75% / 13%	Course duplication has not been reduced (57%) Recognition of credits and degrees from other institutions has not become easier (71%) Recognition of prior learning has not become easier (43%) Student pass rates have not improved (83%)
Czech Republic	56% / 31%	Teaching methods have not been changed (43%) Student pass rates have not improved (79%) Recognition of prior learning has not become easier (57%)
Denmark	100%	Examinations have not been revised (40%) Cooperation among staff has not improved (60%) Student pass rates have not improved (60%)
Finland	57% / 43%	Examinations have not been revised (43%)
France	11% / 61%	Examinations have not been revised (42%) Course duplication has not been reduced (67%)
Germany	70% / 26%	Learning paths have not become more flexible (46%)
Greece	25% / 50%	Examinations have not been revised (50%)
Hungary	57% / 29%	Recognition of credits and degrees from other institutions has not become easier (50%)
Ireland	86% / 14%	Examinations have not been revised (43%)
Netherlands	100%	Recognition of credits and degrees from other institutions has not become easier (56%)
Norway	91% / 9%	Course duplication has not been reduced (73%) Recognition of credits and degrees from other institutions has not become easier (50%) Learning paths have not become more flexible (55%) Student pass rates have not improved (90%) Recognition of prior learning has not become easier (60%)
Portugal	64% / 29%	Student pass rates have not improved (58%)
Sweden	100%	Learning paths have not become more flexible (62%)
Switzerland	11% / 33%	Teaching methods have not been changed (50%) Student pass rates have not improved (67%)

These results show a failure in linking the various elements that would make this reform meaningful: learning outcomes, qualifications frameworks, teaching methods, examinations, and the need to develop curricula as part of academic teams.

Nevertheless, overall there are no notable disagreements with the statement that the “overall quality of teaching has improved” and those who strongly disagree on any item are a very small minority.

4.4.2 The links between teaching and research

In an attempt to understand the balance between teaching and research priorities, respondents were asked to react to a range of statements describing their institutional situation (cf. Figure 22). Their responses should be considered in relation to the fact that 90% defined the profile of their institutions as being “both teaching oriented and research based”.

Figure 22: Do the following statements reflect the current situation at your institution? (Q12)

It is clear that despite the prestige of research, institutions and their staff are more focused on teaching than in the past: 59% note “a growing recognition of the importance of teaching”, most notably in Belgium (75%), Denmark (86%), Finland (75%), Hungary (71%), the Netherlands (89%), Poland (71%), Switzerland (67%), Turkey (76%), Ukraine (71%) and the United Kingdom (87%).

The importance of teaching seems unrelated to the institutional profile: thus, the institutions which define themselves as “primarily research based” seem to consider that the importance of teaching is growing.⁶¹

Only a small minority of institutions (12%) acknowledge difficulties in finding motivated teachers. An even smaller group (nearly 7%) note “a tendency for professors to pass on their teaching duties to assistants” but it is unclear if this is always a negative aspect. Indeed, there is a need to examine more closely how teaching is organised and how it has been changing.

The answers to questions probing the link between research and teaching show that, to some extent, the development of teaching is tied to new research (56%). Furthermore, although research plays a more important role than teaching in the careers of young academics in 54% of institutions, a minority (11%) consider that “students prefer to study with top researchers and professors, regardless of how good they are as teachers”.

The link between teaching and research

- About 56% acknowledge that “the development of courses is tied to new research” “to some extent”, notably in Finland and Greece (63%), Hungary and Ireland (86%), Lithuania (67%), the Netherlands (78%), Norway (91%), Portugal (86%), Slovakia (67%) and the United Kingdom (80%).

⁶¹ However, this is based on very few institutions (3% of the sample) that define themselves as “primarily research based”, 83% of which consider that the importance of teaching is growing.

- 54% state that “research plays a more important role than teaching in the career development of young academics”, particularly in the Czech Republic (56%), Finland (63%), France (83%), Ireland (71%), Italy (70%), the Netherlands (67%), Norway (91%), Portugal (79%), Romania (67%), Spain (78%), Sweden (71%) and Switzerland (78%).
- 11% of the institutions note that “students prefer to study with top researchers and professors, regardless of how good they are as teachers”. This question was used as a proxy to assess whether there is growing importance attributed to the teaching skills of academic staff. The largest number of institutions that agreed with this statement are located in Poland, Russia (both at 26%) and Turkey (30%) while the largest percentage disagreeing with it is found in France (78%).

4.4.3 Promoting employability and linking up with employers

The increase in the number of students, the different ways in which they approach their education and the economic uncertainties are among some of the factors that have prompted higher education institutions to pay attention to issues of employability. The majority of institutions that responded to the Trends questionnaire offer internship and work placement opportunities as well as career guidance to their students.

They also work with employers and professional associations in developing their curricula. A question about the links with employers and professional associations has been a standard part of the Trends questionnaires since 2003. *Trends 2010* noted that the longitudinal study showed “a decline in the number of respondents who indicated close collaboration with employers: 24%, down from about 30% in *Trends III* and *V*.” *Trends 2010* emphasised, however, that “there has been a corresponding rise in the proportion of respondents who indicate that professional bodies and employers are occasionally involved.” (EUA 2010: 39).

The 2015 results are consistent with the 2010 findings:

- 54% of institutions involve professional associations and employers occasionally in curriculum development.
- 24% answered that professional associations and employers are “closely involved”. In some cases, this involvement is mandatory.
- Only 16% answered “never or rarely”.

Thus, the longitudinal analysis confirmed the *Trends 2010* analysis: the proportion of institutions that consult professional bodies and employers peaked between 2003 and 2007, i.e. during the most active period of curricular reform to implement the Bologna degree structure. It has remained essentially stable since then, despite the policy discussions at European and national levels calling for further enhancement.

It should be noted that the link between a specific study programme and employment is rather complex. It would be simple indeed if all study programmes matched a specific job but this is not the case. A 2013 study of the third largest French region revealed that only 17% of jobs were

closely related to a specific study programme and 24% were not related at all; in the middle are 59% of jobs that are loosely related to a specific study programmes (Gay Fragneaud 2013: 16-18).⁶²

In addition to consideration of the correlation between higher education and employment, it is also essential to look at the participation rate in higher education. This is important in creating a critical mass of educated workers who can contribute actively to the economy. Thus, a recent study notes that the US economy prospered when a large portion of the population was educated at a good level to both drive and use technological advances. The paper recommends an increase in the overall educational attainment of a larger share of the population. This requires a focus on all levels of education, including the primary and secondary levels, higher education and lifelong learning (Kearney, Hershbein and Boddy 2015).

4.5 Staff policies

Teaching is the direct responsibility of academic staff who are in charge of developing the curricula, working with the students, etc., within the broad framework and orientations set by the institutions. Therefore, providing support to staff through appropriate policies that take into account all phases of an academic's career is essential to ensure and improve the quality and relevance of teaching.

4.5.1 Recruiting staff

The enhancement of learning and teaching is highly dependent on qualified and committed staff. Unsurprisingly, staff recruitment is an important priority for institutions. At the point of recruitment, institutions report having set strategic staff recruitment goals. By order of importance these are:

- “hiring staff with international experience” (84%)
- “internationalising staff” (79%)
- “enhancing staff diversity (gender, age, nationality)” (70%)
- “hiring staff who have studied or worked at another institution” (65%)

Do the institutions that define themselves as serving the worldwide community behave in different ways? The results for the Netherlands, Switzerland and the United Kingdom show that a higher number of institutions than the European average favour “enhancing staff diversity” (Netherlands 100%, Switzerland 89% and the United Kingdom 80%) and “hiring staff who have studied or worked at another institution” is important in the Netherlands and Switzerland (respectively 78% and 89%) while it is only the case of 33% of the respondents from the United Kingdom.

4.5.2 Evaluating academic staff

As discussed in Part II, internal institutional quality processes have been a very important development over the past 15 years in Europe and the Trends 2015 questionnaire asked a number of questions related to the evaluation of academic staff and academic activities:

- An examination of academic staff evaluation practices shows that teaching is evaluated more regularly (89%) than research (84%). The largest numbers of institutions that do not evaluate teaching regularly are found in Finland (25%), France (67%), Sweden (43%) and Turkey (24%).
- 72% of institutions have a process in place to address consistently poor teaching performance. This includes requiring faculty deans or department heads to discuss teaching performance with staff on a regular basis (67% of institutions).
- Student feedback questionnaires are the most extensively used instrument for the evaluation of teaching performance (93%). Teachers' portfolios are used by 45% of institutions (with 20% planning to develop this) and peer feedback by 37% of institutions (with a further 20% planning it).

In addition, feedback on teaching is collected by 98% of respondents, on the general learning environment by 83% and support services by 73%. Thus, it is clear that internal QA processes focused on teaching are spreading across Europe and that students are increasingly involved in these processes, but there is a need to diversify the instruments used to evaluate teaching (EUA 2011c).

4.5.3 Developing teaching skills

There have been systematic efforts to enhance teaching skills through a combination of optional (75%) and compulsory (40%) courses (with a further 13% and 15% of institutions, respectively, planning them). These courses are offered by a didactic or pedagogical development unit, which seem to be very frequent. Only 17% respond that they have no such unit; the bulk of institutions (60%) have a central unit; the remaining 33% have units located in faculties or departments that sometimes have an institution-wide brief.

This demonstrates a strong progression compared to a 2010 survey of these developments. "Examining Quality Culture" (EQC 1) showed that only 48% of institutions reported the existence of an academic development unit. The Trends results also confirm the EQC 1 conclusion that a long history of engagement in quality assurance processes results in setting up such units. Thus, "centralised units for QA, pedagogical development and staff development are more likely to be in place in those universities that worked on their QA system before 2000... The existence of a unit in charge of pedagogical innovation follows the same trend." (EUA 2010: 20).

Academic development is supported by "research on learning and teaching" in 66% of institutions, with a further 16% that are planning it. Good teachers are recognised in 65% of the institutions, with a further 19% planning to develop a recognition scheme.

Other activities that are mentioned in the open responses include yearly conferences on teaching, encouraging staff mobility and exchange, and mentoring teachers.

4.5.4 Diverging patterns

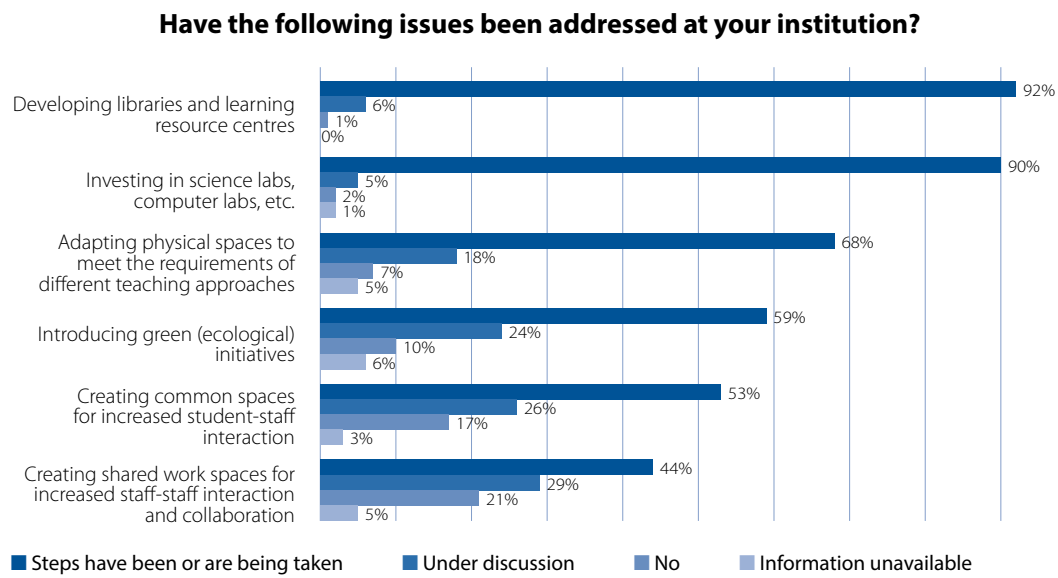
Thus, there is increased focus on quality assurance and staff development but there are also some exceptions to these developments:

- The institutions least likely to use peer feedback are most often located in Austria (70%), Belgium (63%), France (61%), Italy (64%), Lithuania (50%), Norway (64%), Spain and Switzerland (44%).
- France is the country where most institutions do not use teaching awards (61%).
- Although 89% of the French respondents report using student questionnaires, only 39% use their results in individual performance evaluations, 17% intervene in the case of consistently poor evaluations, and deans and heads of departments discuss teaching performance regularly in 24% of institutions.
- The country least likely to offer academic staff development is Greece where 50% of institutions are planning neither optional nor mandatory courses in, respectively 50% and 75% of the cases. Furthermore, 78% of institutions in France and Switzerland say “no” to compulsory staff development.
- Those unlikely to develop research on learning and teaching are most often located in Austria (40%) and the Czech Republic (56%).

These differences might be interesting to explore in a further study regarding the cultural and sociological elements at play, e.g. concerning academic hierarchies, perceptions as to whether the academic profession can and should be trained and evaluated, about the impact of civil servant status on staff evaluation and development, the role of the senior leadership, etc.

4.6 Enhancing the learning environment

Institutions were asked if a variety of aspects had been addressed to enhance learning and teaching. As Figure 23 shows, improvement seems to be concentrated on learning equipment: libraries and learning centres for 92%, and science and computer labs for 90% of respondents. Thus, it is noteworthy that the growth of e- and blended-learning is not displacing interest in renovating the ‘brick-and-mortar’ environment, which is probably in the process of becoming a subset of the virtual learning environment.

Figure 23: Have the following issues been addressed at your institution? (Q17)

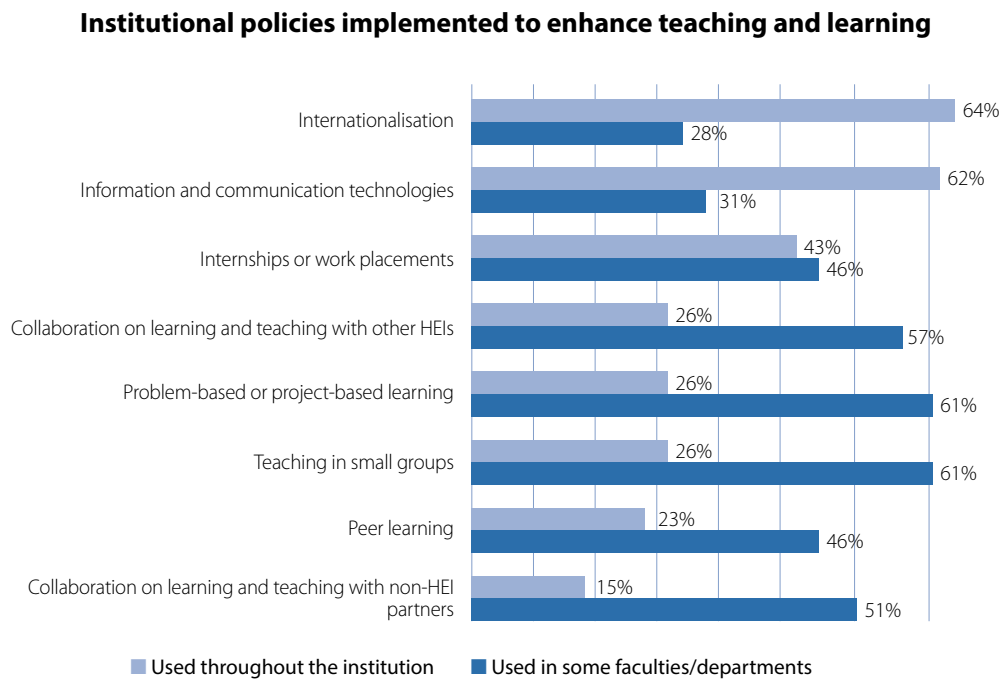
In addition, a significant number of institutions are adapting their physical space to meet the requirements of different teaching approaches (68% on average and 100% in Denmark), while “introducing green (ecological) initiatives” (59% on average and 100% in the United Kingdom).

Because learning and teaching can be enhanced by increased social interaction, institutions have created common space to foster interactions between student and staff (53% on average and 83% in Denmark), and staff-to-staff (44% on average and 100% in Hungary).

Thus, at least on the surface, the economic crisis does not seem to be affecting the most important investments related to learning and teaching and – importantly – there is little disparity across Europe regarding concerns with these issues. However, this might be an overly optimistic view because the answers are not sufficiently precise to measure the level of investments and how budget priorities are set. The prudent interpretation of these results is that they show little disparity across Europe in the commitment to improve the physical space.

A range of faculty- or department-led developments shows the dynamism of this area, and demonstrates that the responsibilities for academic initiatives are more frequently lodged at that level. Thus, Figure 24 shows a significant shift between the first two types of activities that are supported centrally and the last four that are taken at the initiatives of departments or faculties. The third – internships and work-placements – is organised almost as often at the central as at the faculty level.

Figure 24: Have the following been implemented at your institution to enhance learning and teaching provision? (Q38)



Institutions in Latvia scored consistently high on all items that are implemented institution-wide, followed by institutions in Hungary, the Netherlands, Poland, and the Russian Federation, while institutions in Belgium, France, Ireland, Lithuania and Sweden seemed comparatively more decentralised with respect to learning initiatives.

4.7 Supporting the progression of students

A range of questions sought to identify ways in which institutions are focused on ensuring student achievement through activities that are ancillary to the classroom, particularly student support services and student engagement. This is analysed in the first section below. A second section examines the type of institutional data collected via surveys and how they are used to improve student achievement.

4.7.1 Ensuring student success and engagement

In order to understand how institutions support their students, the questionnaire focused on all phases of the student lifecycle – before, during and after their formal study period. The lifecycle model provides a useful way for conceptualising the main transition points in student development and evaluating the attention given to every stage.

Before admission, services targeting prospective students include:

- Open days and educational fairs (95%)⁶³
- Academic orientation and advice (90%)
- Outreach to secondary schools (82%)
- Bridging courses (59%)
- Special admission policies (40%), most notably in the Czech Republic (63%), Ireland (86%), and the United Kingdom (67%)

Bridging courses

The questionnaire defined bridging courses as “enabling graduates from secondary school or other education sectors to access higher education”. They could refer to courses bridging secondary and higher education, courses for students crossing from vocational colleges, for international students, etc.

- They seem to be a growing trend, notably in Austria (70%), Belgium (63%), the Czech Republic (69%), Finland (75%), Germany (85%), Hungary (71%), Ireland (71%), Latvia (71%), Lithuania (83%), the Netherlands (89%), Poland (64%), the Russian Federation (100%), Sweden (79%), Ukraine (71%) and the United Kingdom (93%).
- The countries where relatively few institutions offer bridging courses are located in Denmark (29%), Greece (13%), Norway (36%) and Turkey (29%).

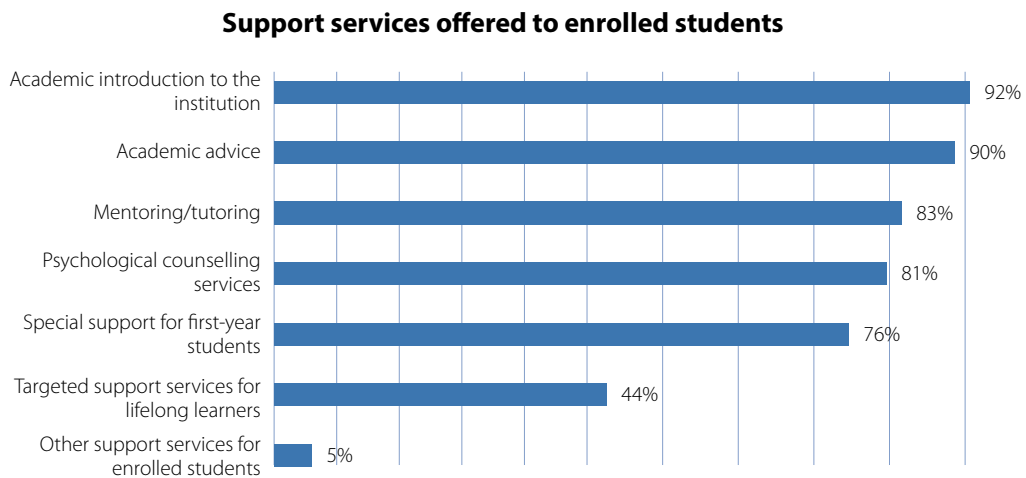
It is worth noting that institutions stating that they have lifelong learning strategies are more likely to have special admission policies (72% vs. 40%) and bridging courses (68% vs. 59%). These answers confirm the observation made earlier about the existence of targeted institutional strategies to broaden access (cf. Part III).

Once students are enrolled, the bulk of institutions offer a range of support services. It is remarkable that 100% of the Irish institutions offer all the services listed in Figure 25. The results for Ireland are in line with the emphasis on broadening access in the country. The Eurydice’s access report singles out Ireland for its good performance in this area (European Commission/EACEA/Eurydice 2014). Institutions in other countries offer the same range although less frequently.

Compared to other categories, lifelong learners seem to be the group with the least support. Although this result might conceal the fact that some institutions mainstream lifelong learners and do not treat them as a separate category, it should be noted that institutions in a wide range of countries do support lifelong learners (notably in Belgium, the Czech Republic, France, Hungary, Ireland, Latvia, Lithuania, Romania, the Russian Federation, Turkey and the United Kingdom).

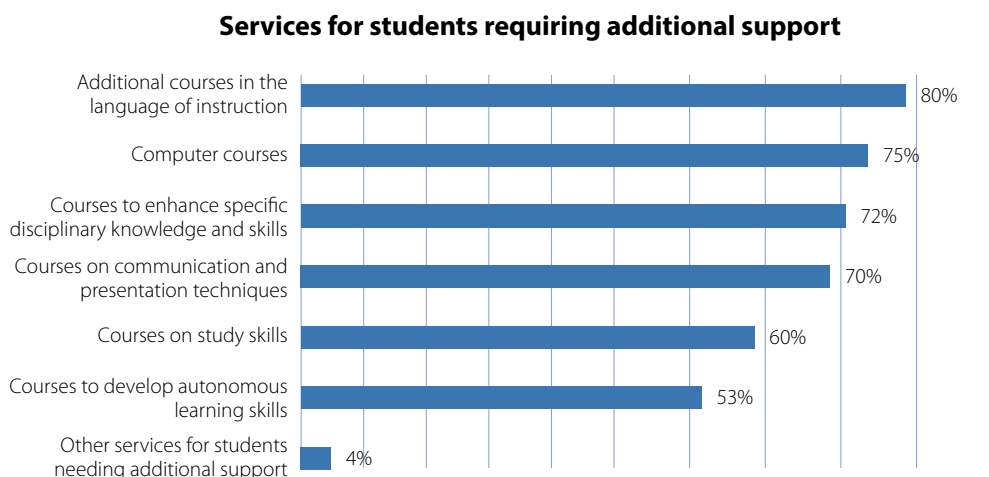
⁶³ A study of fairs shows that they tend to bolster social reproduction. They attract specific student categories (upper/middle/lower social classes) depending on the prestige of the group of institutions that are assembled (van Zanten and Legavre 2014). Further studies would be required to confirm this important finding.

Figure 25: Does your institution offer any of the following support services to enrolled students? (Q25)



Students with special needs receive the following additional support as illustrated in Figure 26. Again, the Irish institutions offer the strongest support to their students followed by those located in Germany and the United Kingdom. These initiatives indicate a growing awareness of students who require additional support, probably because of their secondary school preparation.

Figure 26: Does your institution offer any of the following to students who need additional support? (Q26)



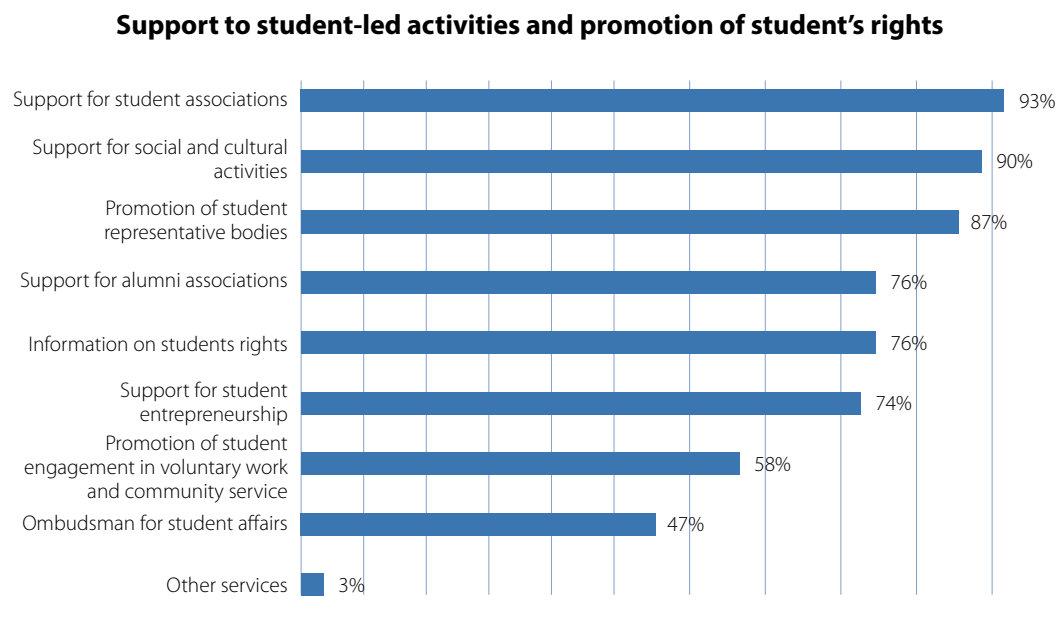
Student engagement in governance is the logical consequence of student-centred learning. Furthermore, because such engagement can be a factor of academic success, two questions sought to chart the involvement of students in governance and the extent of institutional support provided to student associations.

The answers show that students are most likely to have voting rights in their faculties and departments than at university level. Thus, 72% mention that students have voting rights in faculty and departmental bodies and 70% state that they are involved in committees at these two levels. By comparison, a slightly smaller percentage responded that students have voting rights in the university senate (66%) and the university board/council (58%).

Where students do not have voting rights, they usually have a consultative role; it is very rare that they are completely absent from the decision-making process. Thus, students are not involved in the university board or council in 10% of institutions, in the university senate in 3% of institutions and in faculty or department governing bodies in 3% of institutions.

In addition, institutions that support student-led activities and promote students' rights through the initiatives are listed in Figure 27.

Figure 27: Which of the following does your institution provide to students? (Q28)



These results show little disparity across Europe for the first six activities. However:

- Promotion of student engagement in voluntary work and community service is particularly emphasised in Ireland, Portugal and Spain (86%), the Russian Federation (95%), Ukraine and the United Kingdom (100%).
- Ombudsmen are most frequently found in Belgium (75%), the Netherlands (89%) and Spain (86%).

Institutions offer a range of services and activities to support entry into the labour market. Some of these are centralised and others are faculty-based:

- Centralised services and activities tend to include career guidance (75%), recruitment events and employer presentations (69%), work placement opportunities (63%), websites portal and social media facilitating contacts with employers (52%). In addition, the integration of transferable skills development into curricula and voluntary work seem to be promoted centrally in 46% and 37% of institutions, respectively.
- Faculty-based services tend to focus on integrating entrepreneurship into curricula (50%) and offering external mentoring opportunities (33%).

After graduation, institutions track their graduates' career development (cf. next section) and organise alumni services (Figure 27). Both are increasingly common in Europe. EUA's Trackit

report had identified the emergence of an alumni culture in Europe as a developing trend (EUA 2012: 42-43).

Student support services are key to student success. The results of the questionnaire show that dropout rates decreased over the last decade for institutions in countries that stood out as offering the largest range of services.⁶⁴ These are primarily located in Austria, Denmark, Finland, Germany, Hungary, Ireland, Netherlands, Spain and the United Kingdom. In all cases, their student support services appear to be strong and they seem to be providing a strong safety net.

4.7.2 Surveying students

If student success is founded upon good student support, it also requires good data collection in order to understand patterns of student success and how the institutions can address weaknesses in this area. This is particularly crucial given the growing diversity of the student population. Institutions are aware of this need and surveys are becoming increasingly common.

Patterns in surveying students

- *After graduation*: 53% of institutions track their recent alumni regularly. More than 75% of institutions do so in the following countries: Denmark, Finland, Hungary, Ireland, Italy, the Russian Federation, and the United Kingdom. A further 21% track a sample of graduates. In a minority of cases (11%), tracking is done by some faculties or departments rather than by the institution. These results confirm the findings of EUA's Trackit report (EUA 2012: 1-30).
- *Alumni tracking* studies are focused slightly more frequently on those who leave with a Master's degree (87%), than on those who have earned a Bachelor degree (81%). This reflects the fact that in many countries students, as a matter of course, proceed from the Bachelor to the Master's level. Tracking doctorates shows a very quick progression since 2011 when a survey measured this activity at 23%.⁶⁵ It is now at 48% – a surprisingly high value.
- *Surveys on the general student experience*: 51% of the institutions track all students, notably in Belgium (75%), Denmark (71%), Finland (63%), Hungary (71%), Ireland (67%), Latvia (86%), the Netherlands (89%), Norway (73%), Portugal (64%), Slovakia (78%), Spain (72%) and the United Kingdom (100%). A further 25% track a sample of students and 18% do not use such an instrument.
- *Exit surveys at graduation*: 47% offer surveys to all their students on exit, with a further 25% to a sample of students; 22% do not use this type of instrument most notably in the Czech Republic, Greece, the Netherlands, Slovakia and Turkey.
- *Entry survey* on background and expectations of newly enrolled students comes as distant fourth with the number of "no" rising to 37%. They are most frequently used in Lithuania (83%) and Ukraine (71%).

⁶⁴ The results of the questionnaire show that, since 2010, student dropout rates have tended to remain the same or decrease in 45% and 23% of institutions, respectively. It should be noted, however, that 13% do not track dropout rates.

⁶⁵ Cf. EUA 2013a: 37. 112 institutions responded to this survey, including a particularly strong response from the United Kingdom (22).

- *Exit surveys for dropout students* are clearly not a frequent and systematic practice, except in Ireland (83%). Although 54% do not use them systematically, the open answers indicate that they are used on an irregular basis or at wide intervals and that some institutions are currently developing them. The *Trackit* study confirms how difficult these types of surveys are. When students drop out, they are unlikely to respond to a questionnaire. Institutions also have doubts about the credibility of the answers: students might feel relatively comfortable reporting such difficulties as funding, family obligations, changed career plans, but would be reluctant to report other reasons such as feelings of alienation or difficulties dealing with the complexity of universities (EUA 2012: 36-37).
- In addition, the open answers mention several examples of other types of instruments. By decreasing order of importance, these are teaching evaluations, assessment of administrative staff/services, and surveys of postgraduate and doctoral studies, alumni, and employers' expectations.

All these surveys are used "for strategic purposes, internal quality assurance, dialogue between central leadership and faculties", thus confirming the *Trackit* results (EUA 2012: 51-52). Specifically, the 2015 Trends results show that the central level is the primary user (68%), followed more distantly by the faculties and departments (16%). Only 4% state that they are not used, and a further 12% did not know or did not answer.

The results of the most frequently used instrument – the graduate surveys – support the following activities:

- They are "assessed for strategic purposes and to enhance the quality of teaching provision and services" (81%);
- "Marketing purposes/strategic positioning" (64%);
- Developing alumni services (51%);
- Communicating with the public ("published, for instance on the institution's website", 44%);
- Reporting to the "government and/or other relevant national/regional authorities" (42%). In 37% of cases, institutions are legally required to track graduates.

An open question provided an opportunity to indicate how surveys were used. Nearly 60% of respondents took the trouble of answering this question; this was the highest number of responses to any of the open questions. Ten pages of responses were collected and revealed three broad types of use:

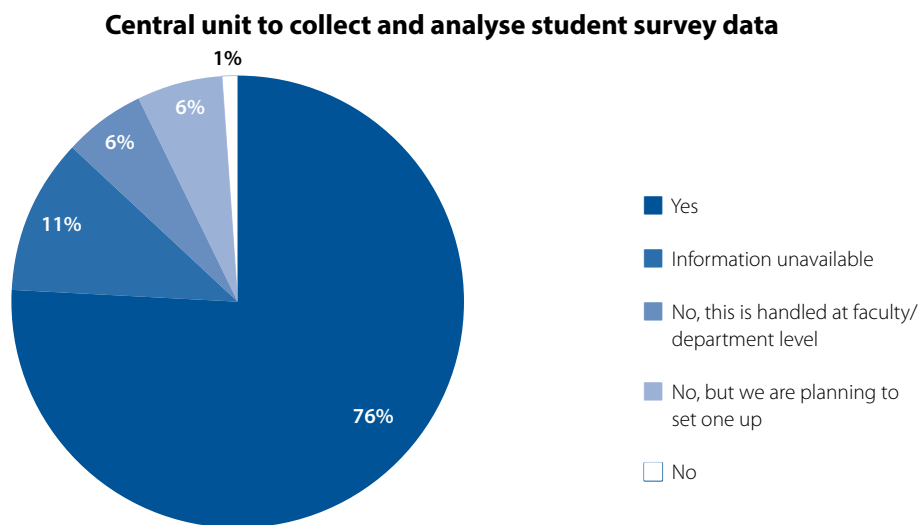
- To *evaluate the institution* and improve some of its aspects (e.g. the study programmes, the learning environment, etc.): surveys seem to be a regular part of the internal quality assurance arrangements and used as a basis for decision-making at various levels (e.g. the university's central level, the faculties, the departments and the pedagogical committees). Their results are fed into academic and institutional planning and are instrumental to improving the institution.

- *To evaluate people* (academic and administrative staff and students): surveys are sometimes used in the promotion process and as a basis for designing staff development modules. Surveys can also assist in identifying student-related issues, measure students' skills acquisition, improve academic advice and counselling and develop additional support services, etc.
- *To improve the interface with society*: surveys can help refine student recruitment strategies, adjust curricula to labour market needs and enhance career services.

Different constituencies within the university receive the results of these surveys, including the leadership at the university, faculty and departmental levels as well as the students.

These results show that the institutional research function⁶⁶ is developing quickly, partly as a response to multiple requests for institutional data, including for quality assurance and ranking purposes (EUA 2014a: 49). Thus, 76% of Trends respondents noted the existence of a central unit to analyse the collected data (Figure 28). The institutional research function develops and assists the university leadership and the academic staff in finding targeted ways of serving students and ensuring their success.

Figure 28: Is there a central unit (e.g. planning department, research unit) which analyses the data collected? (Q30.3)



Given the rapidly developing experience in this area, it would be useful to follow up the 2012 EUA *Trackit* report with a new study in order to assess whether the challenges identified in this report have been addressed (2012: 57-58).

4.8 Summary of key trends

The starting point of the Trends 2015 questionnaire was provided by the main conclusions of the *Trends 2010* report, which had identified the need to look at the Bologna reforms as an interconnected set of changes that find their coherence in the concept of student-centred learning. Significantly, the notion of student-centred learning redefines the respective roles of the learners and the teachers and requires institutions to provide the conditions for introducing new ways of learning and student engagement.

The Trends 2015 results confirm the pre-eminence of both internationalisation and ICT in the development and improvement of learning and teaching. Their importance is expected to grow further. The answers suggest that the quality of learning and teaching has improved thanks to student and staff mobility while ICT developments are expected to contribute to increasing the flexibility of access to the learning provisions and the effectiveness of classroom time.

Trends results appear to show little disparity in the European Higher Education Area concerning the ICT tools in place but differences within higher education institutions in respect of specific teaching innovations (whether ICT-supported or not), which tend to be piloted at the level of departments and faculties.

However, as far as current and future generations of students are concerned, these findings do not capture a possible disconnection between the way the students learn and the way they tend to be taught. This would require further study. Furthermore, it should be remembered that the ICT revolution is not over. Institutions will need to examine carefully how they can support students in this evolving environment, contribute to developing their skills in evaluating and analysing available information and transforming it into scientific understanding and knowledge, while also equipping them with the digital competences that will be required by their future professional environment.

The answers also show that introducing new ways of teaching is important to 57% of the institutions. The implementation of learning outcomes has continued to progress since 2010. Institutions are positive about the benefits of learning outcomes, albeit not in all countries. It is clear, however, that in many institutions their implementation appears to have taken place without changing in radical ways how curricula, including examinations, are developed. Therefore this area is still work in progress.

Moreover, slightly more than half of the institutions take into account advances in research and the views of employers and professional associations, as appropriate, when revising their curricula.

Nearly 60% of institutions report “a growing recognition of the importance of teaching”. This is demonstrated by a range of developments focused on both staff and students that support the enhancement of learning and teaching. Thus, staff policies seem to be benefitting from a more strategic approach: 65% to 84% of institutions report variously a focus on international recruitment, academic experience gained in another institution and, more generally, internationalising staff through staff mobility.

The quality of the teaching is supported by quality assurance processes, including student evaluations (93%) and by the work of academic development units (60%). While these are positive results, it should be noted that there is an over-reliance on the student questionnaire

as the sole method for evaluating teaching performance, instead of combining this with other instruments.

Changes in the learning environment, such as improving equipment, libraries and learning centres and creating common rooms for students and staff as well as centres for learning and teaching, seem fairly common. The reference to investment in the infrastructure is surprising given the economic crisis but it is difficult to evaluate the scope of these changes based on this questionnaire.

A variety of activities developed by institutions confirm the existence of targeted institutional strategies to increase and broaden access, whether it is through academic orientation and advice or bridging courses to bring secondary school leavers up to the level of introductory course work in higher education.

A range of different support services and pastoral care are available to support students during their time at university. While most institutions report dropout rates to have remained roughly stable since 2010, those offering the broadest range of student support services report a decrease.

Student involvement in governance is prevalent almost everywhere (albeit more at faculty than at central level) and many institutions provide support for student-led activities and volunteer engagement in the local community.

Three-quarters of the institutions report offering career guidance services to students before graduation. After graduation, the same proportion of institutions sustain alumni involvement in the university.

The use of student surveys is growing and is becoming increasingly sophisticated. A growing number of institutions are developing a range of instruments to track their students during and after their studies. The results of these surveys are used to improve the educational offer and institutions' responses to students' needs.

Is the glass half-full or half-empty? The data show that not all these positive developments are common everywhere and, therefore, more progress is needed. Furthermore, these findings would require confirmation through other means than quantitative surveys, which do not contribute to a better understanding of how these changes have been implemented. For instance, the existence of internal quality processes does not necessarily signal the development of a genuine quality culture. The lack of disparity in the use of ICT shown by this survey would require further investigation in order to reconcile it with the findings of other studies, etc. The impact of the economic crisis is bound to act as a break on change, at least in some countries. This would also require a specific study.

PART V:

Universities in the next decade⁶⁷

The key findings of the report can be found at the end of each of the previous sections, and in the executive summary. Building on these, the intention of this short, concluding section is to highlight four clusters of issues that are likely to be particularly important for universities in supporting further improvement and innovation in their teaching and learning activities. EUA will advocate for action on these issues at policy level and through collaboration with its members with a view to promoting mutual learning and an exchange of views among its diverse membership.

5.1 Maintaining the momentum: the importance of learning and teaching

As documented in the report, learning and teaching in European higher education institutions is changing as institutions respond to the Bologna reforms and to diverse national agendas and global developments. Many institutions are broadening their access, supporting a variety of learners and increasingly using information and communication technologies to provide more effective learning environments and added flexibility for learners. They are also engaging more within their local communities, with employers, business, and industry while also extending their reach internationally.⁶⁸

While many of the changes observed in this report provide a rather positive picture, the following issues should be addressed if progress is to be continued and consolidated in future:

1. **Lifelong access to learning for a diverse student body:** Trends results show that student success is based upon several interconnected aspects. The starting point is to ensure that all levels of education adequately prepare students for higher education. Cooperation is required across these levels, and in particular with secondary level schools, in order to ensure a good transition into higher education. Once students are enrolled, their success hinges on what takes place both inside and outside university classrooms, whether these are “click or brick”. The most effective universities are those that offer a full array of closely coordinated and linked student support services – academic and pastoral care – with a stress on student engagement through their involvement in governance, volunteer activities in the community, etc.

⁶⁷ This chapter was written by Michael Gaebel, Andrée Surssock and Lesley Wilson.

⁶⁸ Cf. Skúlason 2015 for a very enlightening view of European universities.

An increasing number of institutions are also pursuing their relationship with their students well beyond graduation, for example through developing alumni services. More importantly, institutions are increasingly involved in offering lifelong learning opportunities to a range of different learners. This requires strong commitment from the universities themselves as well as support from policy makers at different levels, as underlined by EUA in its 2008 Lifelong Learning Charter.⁶⁹ While at present lifelong learning is often offered as a fee paying service, the growing trend towards e-learning and blended learning may well blur the existing boundaries between lifelong learners and more traditional students.

2. Student-centred learning and preparation of graduates for the labour market and society:

While there is a general consensus on the importance of these two topics, what it actually means in practice is not always clear, especially in times of budget cuts in many systems. The Trends report underlines once more that efforts made to promote student-centred learning and better equip students for the workplace and society take different shapes, depending upon the discipline, the type of programme, its level and its learning outcomes, and very importantly the profile and mission of the institution in question.

However, the *Trends 2015* report does point to the importance of promoting active learning and interdisciplinarity and ensuring that teaching is ICT-supported and research-led. It is also expected that the impact of ICT on learning is likely to be significant as blended forms of learning spread. The use of learning analytics and flipped classrooms are some of the early and positive manifestations of the changes that digitalisation brings to student learning. In future, the impact of the Open Science movement and increased use of ICT in university administration will also have to be taken into account.

There is consensus around the importance of developing graduates' transversal skills but little knowledge of how this is incorporated into intended and achieved learning outcomes and translated into learning activities. The Trends questionnaire did not address this aspect specifically but the feedback received about learning outcomes in general was mixed. Comparative research would be useful in assisting policy-making and institutions in this area. It would be also important to examine closely whether and how learning-outcome approaches take into account both the diversity of learning styles and the extensive mix of skills that are required to function in complex environments. Greater engagement in the community through involvement with different external stakeholders is surely one way in which such skills can be acquired ensuring real benefits for society, students and institutions.

3. Development and implementation of effective internationalisation strategies: The report underlines the continued importance of internationalisation for higher education systems and institutions. As time passes, student and staff mobility are becoming a better understood and more strategic and integrated element of internationalisation, as institutions become increasingly aware of their impact and strategic potential for both teaching and research. Internationalisation is also perceived as a mechanism for preparing students for global citizenship and for developing a range of partnerships and research collaborations. Once again ICT will probably also play a more important role in the future, for example, in realising the 'international classroom'. This does not mean that this will become a substitute for mobility exchanges but rather a complementary component.

In developing their international strategies, as in other areas, institutions need to consider the benefits, consequences and even risks of different approaches, including the costs involved

and sustainability prospects; they also need to reflect on the proper balance between cooperation and competition with other universities. The positive and negative impacts of specific national strategies for internationalisation of higher education also need to be taken into consideration, particularly when these are defined narrowly as national instruments of economic competitiveness or political diplomacy.

5.2 Organisational structures and human resources

Trends 2015 also addressed the framework conditions for teaching and learning at institutional level. The following aspects should be addressed in creating environments that support improvements in teaching and learning.

Internal organisational change: The developments described in the report suggest that changes in learning and teaching often impact on the internal organisation and management of institutions. Thus, adjustments to the number and size of units (faculties, departments, institutes) might be required to ensure they are fit for purpose, for example to facilitate interdisciplinarity. Similarly, developing shared institutional quality frameworks and standards that enable and support diversity and innovation may result in reviewing the balance between centralised management and more devolved responsibilities.

Technological developments also drive changes in organisational structures, including considering how to link (digital) libraries, centres for learning and teaching and overall data management facilities that collect and analyse data, for example, in relation to tracking students and graduates, or combining data from learning analytics.

As a result of such changes, staffing levels and profiles may need to be reassessed, in particular the availability of senior positions to coordinate and manage newly defined responsibilities. In parallel, the spread of technology-assisted learning may be leading to a redefinition of academic staff roles, with different functions being distributed to different staff members (e.g. designing and delivering a course, testing students, advising students, etc.) This would be an important development to watch.

Staff development is pivotal to ensure that they are committed to the changes that are being introduced: *Trends 2015* revealed that this is by no means accepted everywhere. It would be useful to understand better the sociocultural and organisational factors that make it welcome in some places and unacceptable in others, including possible national and disciplinary differences.

Staff profiles are also changing in other ways. Several studies have shown that strengthened and more professional institutional management is associated in many systems, albeit to different degrees, with the growth in the number of “hybrid” administrative staff. These “new higher education professionals” generally hold postgraduate degrees and are recruited specifically to support organisational change, in particular to senior posts that directly support academic or high-level administrative functions (QA, international office, research coordination, data collection and management, financial planning and risk assessment, etc.). While this development is not equally distributed across Europe, it would be useful to understand the implications of this trend.

5.3 The growth of marketisation in higher education: blurring the lines between public and private?

In recent years, the dividing line between public and private is no longer as clearly defined as it was previously. This can be explained to some degree by cuts in public funding due in part to weak economic growth. However, even in systems where public funding is still very much the norm the importance of private contributions is growing. Examples include fees levied for lifelong learning programmes, differentiated tuition levels for non-EU international students and greater private industry funding for research and innovation. There are also more visible forms of marketisation, such as the acquisition of vulnerable public and private higher education institutions by profit-making companies.

Leaving aside the question of who pays for higher education and focusing on learning and teaching, the recent growth in the number of online providers is likely to open up a broader range of opportunities for collaboration, be it with educational bodies, private companies catering for professional development, or non-commercial entities focused on community education or lifelong learning.

The interest shown by investment capitalists in MOOC platforms suggests that this is potentially a very profitable area, with a worldwide reach and the unrivalled capacity to collect information on millions of learners. For the time being, however, MOOCs are free, and the fees paid to obtain optional certificates are low. However, their business model has not yet stabilised and will require close monitoring. This is but one aspect that needs further attention and follow-up.

It would be important to track the visible and less visible forms of marketisation and the impact that private funding may have on institutional mission, academic principles and values, as well as the balance between public funding and returns on investment. Similarly, it would be worth monitoring where and how this is happening, and particularly if there is a difference in the way different sub-regions of Europe address these issues and with what impact.

5.4 A common European agenda

The Trends report shows that across Europe higher education institutions and systems face broadly similar challenges. However, due to very different national and regional traditions, as well as political, economic, and social circumstances, the context and thus the possibilities for change and development differ considerably from country to country. They have been further exacerbated by continued economic crises and, increasingly, demographic developments.

The Bologna Process has shown that change is possible through building common policies on a voluntary basis, as well as through peer learning and sharing good practice that also builds trust across systems and between institutions. In the interests of all, opportunities need to be identified to strengthen further the common framework provided by the EHEA. Progress could be achieved by focusing on high priority areas, such as the use of ICT, pushing for coordinated policies, common approaches and instruments, for example, legal and funding frameworks, and recognition procedures.

Moreover, given the ongoing globalisation of higher education and research and the importance attached to internationalisation, further consolidating the EHEA and enhancing its international visibility are of strategic importance.

The results of the *Trends 2015* report suggest that in comparison to previous years, national policy making has been particularly important in determining action while there have been fewer Europe-wide policy initiatives. This has also come at a time when Europe faces considerable challenges that would require joint European approaches.

Both the Bologna Process and the European Commission, through the development of its various mobility and capacity building programmes and its support to the “Modernisation of Higher Education” Agenda have proved to be important in triggering major changes in the past years. The Bologna Process was particularly effective when it provided a vision for the EHEA and was able to engage a wide range of stakeholders, including students and higher education institutions, through active participation and dialogue.

Given the changed circumstances and the major challenges facing Europe and European higher education, which is documented in the report, it is hoped that the European Commission and the Bologna Process will once more take action working in partnership with stakeholders to tackle these challenges and to further the construction of Europe and the EHEA.

APPENDIX

1. Trends in European Higher Education 2015 – Questionnaire for heads of higher education institutions

Structure of the questionnaire

The questionnaire is divided into seven thematic sections:

- I. The institution and its context
- II. The enhancement of teaching and the role of academic staff
- III. Student lifecycle
- IV. Study programmes
- V. E-learning
- VI. Internationalisation
- VII. Quality assurance, qualifications frameworks and recognition

I. The institution and its context

This section asks for the contact details of the person answering the questionnaire and some basic information on your institution. This will help us to gain a better understanding of the answers you will provide later on in the questionnaire.

1. Please provide the name and contact details of the person filling in the questionnaire.

First name:
Last name:
Position:
E-mail:

2. Please select your country/higher education system and institution from the drop down menu below. If your institution does not appear in the list of institutions, please choose "other" from the list and provide the requested information on the next page.

Country/higher education system	
Institution	

NB: In a number of European countries (Belgium, Germany, Spain, UK), responsibility for higher education is devolved from national to regional level. If you are based in one of these countries, please answer for your region whenever the question refers to 'national' or 'country'.

2.1 If "other", please provide the name of your institution.

In the original language:
In English:
Web address of the institution:

3. When was your institution founded? Please state the (approximate) year (yyyy).

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4. Which community do you see your institution primarily as serving?*Please choose one option.*

Local	<input type="checkbox"/>
Regional	<input type="checkbox"/>
National	<input type="checkbox"/>
European	<input type="checkbox"/>
Worldwide	<input type="checkbox"/>

5. How would you describe the profile of your institution? Please choose one option.

Primarily teaching oriented	<input type="checkbox"/>
Primarily research based	<input type="checkbox"/>
Both teaching oriented and research based	<input type="checkbox"/>

6. What is the total number of students enrolled at your institution?*Please provide approximate and available figures based on the 2012-2013 academic year.*

	Full-time	Part-time
Short cycle degree (pre-Bachelor)		
Bachelor (first cycle)		
Master (second cycle)		
Doctorate (third cycle)		
Degree students studying outside the Bologna framework		
Non-degree students		
Other – please specify below		
Total number of students		
<input type="checkbox"/> If you ticked "other" above, please specify here:		

7. What is the total number of staff employed by your institution?*Please provide approximate and available figures based on the 2012-2013 academic year.*

Academic staff	
Administrative staff	
Total number of staff	

8. Which statement best describes the situation at your institution?*Please choose one option.*

The realisation of the European Higher Education Area (EHEA) has generally been very positive	<input type="checkbox"/>
The realisation of the EHEA has had mixed results	<input type="checkbox"/>
The realisation of the EHEA has been negative	<input type="checkbox"/>
The realisation of the EHEA has made no difference	<input type="checkbox"/>

9. Since 2010, how important have national reform initiatives on the following issues been for your institution? Please choose one option for each item.

Initiatives linked to/in the area of	Low importance	Medium importance	High importance	There have been no reforms or initiatives	I do not know
Bologna degree structure					
Implementation of learning outcomes					
Learning and teaching generally					
Lifelong learning					
Widening access and participation					
Internationalisation					
Student recruitment					
Research policy					
Tuition fees					
Institutional funding					
Governance and autonomy					
Quality assurance					
Other – please specify below					
<input type="checkbox"/> If you ticked "other" above, please specify here:					

10. Since 2010, how important have the following developments been for your institution? Please choose one option for each item.

	Low importance	Medium importance	High importance
Demographic change			
Economic crisis			
Use of information and communication technologies in teaching, research, management, etc.			
European Commission initiatives in research and innovation (policies and funding)			
European Commission initiatives in education (policies and funding)			
Internationalisation			
Rankings and league tables			
Growing competition with other HEIs			
Enhanced cooperation with other HEIs			
Collaboration within your region (i.e. with other universities, communities, employers)			
University-business cooperation			
Other – please specify below			
<input type="checkbox"/> If you ticked "other" above, please specify here:			

11. In the medium term, how important will the following developments be for your institution? Please choose one option for each item.

	Low importance	Medium importance	High importance
Demographic change			
Economic crisis			
Use of information and communication technologies in teaching, research, management, etc.			
European Commission initiatives in research and innovation (policies and funding)			
European Commission initiatives in education (policies and funding)			
Internationalisation			
Rankings and league tables			
Growing competition with other HEIs			
Enhanced cooperation with other HEIs			
Collaboration within your region (i.e. with other universities, communities, employers)			
University-business cooperation			
Other – please specify below			
<input type="checkbox"/> If you ticked "other" above, please specify here:			

II. The enhancement of teaching and the role of academic staff

This section concerns the enhancement of teaching and the role of academic staff at your institution: what support does your institution provide to enhance teaching? What requirements do academic teachers have to fulfil?

12. Do the following statements reflect the current situation at your institution?

Please choose one option for each item.

	Yes	To some extent	No	I do not know
There is a growing recognition of the importance of teaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research plays a more important role than teaching for the career development of young academics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is increasingly difficult to find people who are motivated to teach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students value good teaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students prefer to study with top researchers and professors, regardless of how good they are as teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is a tendency for professors to pass on their teaching duties to assistants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Innovative teaching methods and techniques are being introduced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The development of courses is tied to new research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. Has there been a systematic effort to introduce or enhance the following at your institution? Please choose one option for each item.

	Yes	No, but we are planning this	No	Information unavailable
Optional courses to enhance teaching skills (preparation or training courses)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory courses to enhance teaching skills (preparation or training courses)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peer feedback system (i.e. teachers provide feedback on each other's teaching)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portfolios in which teachers document their teaching practices (e.g. pedagogical materials, forms of student assessment)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research on learning and teaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition of good teaching (e.g. annual awards, career development, incentives)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below				
<input type="checkbox"/> If you ticked "other" above, please specify here:				

14. At your institution, is there a unit for pedagogical or didactic development? Please tick all that apply.

Yes, at central level	<input type="checkbox"/>
Yes, at faculty/department level	<input type="checkbox"/>
No	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

15. Which of the following is applied in the assessment of academic staff at your institution? Please choose one option for each item.

	Yes	No
Teaching performance is evaluated regularly	<input type="checkbox"/>	<input type="checkbox"/>
Research performance is evaluated regularly	<input type="checkbox"/>	<input type="checkbox"/>
Heads of departments/deans of faculties regularly discuss teaching performance with all academic staff	<input type="checkbox"/>	<input type="checkbox"/>
Student feedback questionnaires are considered in the evaluation of teaching performance	<input type="checkbox"/>	<input type="checkbox"/>
There are processes in place to intervene if a teacher's performance is consistently poor	<input type="checkbox"/>	<input type="checkbox"/>

16. Are the following seen as strategic goals for staff recruitment at your institution? Please choose one option for each item.

	Yes	No
Enhancing the diversity of academic staff (in terms of experience, gender, age, nationality)	<input type="checkbox"/>	<input type="checkbox"/>
Hiring staff who have studied or worked at another institution	<input type="checkbox"/>	<input type="checkbox"/>
Internationalising staff	<input type="checkbox"/>	<input type="checkbox"/>
Hiring national staff who have international experience	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:		

17. Have the following issues been addressed at your institution? Please choose one option for each item.

	Steps have been or are being taken	Under discussion	No	Information unavailable
Adapting physical spaces to meet the requirements of different teaching approaches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investing in science labs, computer labs, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Developing libraries and learning resource centres	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating common spaces for increased student-staff interaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating shared work spaces for increased staff-staff interaction and collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introducing green (ecological) initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

III. Student lifecycle

This section asks for information on the student body: how does your institution support its students, and how are they prepared for life after graduation?

18. How has the total enrolment at your institution changed during the last five years? Please choose one option.

It has increased by more than 10%	<input type="checkbox"/>
It has increased by less than 10%	<input type="checkbox"/>
No change	<input type="checkbox"/>
It has decreased by less than 10 %	<input type="checkbox"/>
It has decreased by more than 10%	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

19. What are the main factors behind these changes in enrolment?**19.1. If enrolment has increased, what have been the main reasons?***Please choose a maximum of three options.*

Changes in admission policies	<input type="checkbox"/>
Stronger emphasis on widening access and participation	<input type="checkbox"/>
Changes in tuition fees	<input type="checkbox"/>
Changes in loan or grant systems	<input type="checkbox"/>
Financial situation of students and their families	<input type="checkbox"/>
Improved employment opportunities for graduates	<input type="checkbox"/>
Youth unemployment	<input type="checkbox"/>
Immigration	<input type="checkbox"/>
Changes in demography	<input type="checkbox"/>
Institutional mergers	<input type="checkbox"/>
International recruitment	<input type="checkbox"/>
Changes in secondary education	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

19.2. If enrolment has decreased, what have been the main reasons?*Please choose a maximum of three options*

Changes in admission policies	<input type="checkbox"/>
Changes in tuition fees	<input type="checkbox"/>
Changes in loan or grant systems	<input type="checkbox"/>
Financial situation of students and their families	<input type="checkbox"/>
Improved employment opportunities for graduates	<input type="checkbox"/>
Uncertain employment prospects for graduates	<input type="checkbox"/>
Emigration (out of your country)	<input type="checkbox"/>
Changes in demography	<input type="checkbox"/>
Institutional mergers	<input type="checkbox"/>
International recruitment	<input type="checkbox"/>
Changes in secondary education	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

20. How do you expect student enrolment at your institution to develop in the future? Please choose one option.

It will increase	<input type="checkbox"/>
It will decrease	<input type="checkbox"/>
It will remain at the current level	<input type="checkbox"/>
Impossible to predict	<input type="checkbox"/>

21. How has the composition of the student body in your institution changed over the last five years? Please choose one option for each item.

	Increased	Decreased	No change	Information unavailable
Full-time students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part-time students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mature students*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Socio-economically disadvantaged students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students without standard entry qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students from ethnic minority groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EU students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-EU students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:				

*As defined in your national context

22. Does your institution have targeted strategies to attract the following student groups? Please choose one option for each item.

	Yes	No	Information unavailable
Part-time students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mature students*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Socio-economically disadvantaged students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students without standard entry qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students from ethnic minority groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EU students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-EU students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:			

*As defined in your national context

23. Does your institution have a strategy regarding lifelong learning (LLL)? Please choose one option.

Yes	<input type="checkbox"/>
No, but we are in the process of developing one	<input type="checkbox"/>
No	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

24. Does your institution offer any of the following to prospective students?*Please tick all that apply.*

Academic orientation and advice	<input type="checkbox"/>
Outreach programmes to secondary schools (information events at schools, schools visiting your institution)	<input type="checkbox"/>
Bridging courses (i.e. enabling graduates from secondary school or other education sectors to access higher education)	<input type="checkbox"/>
Recognition of prior learning	<input type="checkbox"/>
Other special admissions policies (e.g. for disadvantaged groups, non-traditional students)	<input type="checkbox"/>
Open days/educational fairs	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

25. Does your institution offer any of the following support services to enrolled students? Please tick all that apply.

Academic introduction to the institution	<input type="checkbox"/>
Academic advice	<input type="checkbox"/>
Psychological counselling services	<input type="checkbox"/>
Mentoring/tutoring	<input type="checkbox"/>
Targeted support services for lifelong learners	<input type="checkbox"/>
Special support for first-year students	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

26. Does your institution offer any of the following to students who need additional support? Please tick all that apply.

Courses to enhance specific disciplinary knowledge and skills (math, sciences)	<input type="checkbox"/>
Courses on communication and presentation techniques	<input type="checkbox"/>
Courses to develop autonomous learning skills (time management, goal-setting, working to deadlines)	<input type="checkbox"/>
Courses on study skills (note-taking, learning strategies, test preparation, academic writing)	<input type="checkbox"/>
Computer courses	<input type="checkbox"/>
Additional courses in the language of instruction (national language or other)	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

27. Does your institution provide any of the following to promote the employability of graduates? Please choose one option for each item.

	Yes, across the institution	Yes, in some faculties	No, but we are planning this	No
Career guidance		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work placement opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruitment events/employer presentations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External mentoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integrating transferable skills development into curricula	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integrating entrepreneurship into curricula	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Website portal and social media facilitating contacts with employers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:				

28. Which of the following does your institution provide to students?*Please tick all that apply.*

Support for student associations	<input type="checkbox"/>
Support for alumni associations	<input type="checkbox"/>
Information on students' rights (e.g. brochure)	<input type="checkbox"/>
Ombudsman for student affairs	<input type="checkbox"/>
Promotion of student representative bodies	<input type="checkbox"/>
Promotion of student engagement in voluntary work and community service	<input type="checkbox"/>
Support for social and cultural activities (e.g. cafes, cinema clubs, theatre, music)	<input type="checkbox"/>
Support for student entrepreneurship	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

29. What type of governing bodies does your institution have?*Please tick all that apply.*

Senate	<input type="checkbox"/>
Board/Council	<input type="checkbox"/>
Faculty/departmental governing bodies	<input type="checkbox"/>

29.1. How do student representatives participate formally in the governance of your institution? Please tick all that apply.

	Senate	Board/ Council	Faculty/ Department
Voting rights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultative role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership of committees (e.g. quality assurance, curricular)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
They are not involved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:			

30. Which of the following surveys are systematically conducted?*Please choose one option for each item.*

	All students	A sample of students	Not conducted
Entry survey on backgrounds and expectations of newly enrolled students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Survey on general student experience (i.e. current students)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exit surveys for students who drop out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exit surveys at graduation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:			

30.1. If student surveys are systematically conducted, is the collected information used (e.g. for strategic purposes, internal quality assurance, dialogue between central leadership and faculties)? Please choose one option.

Yes	<input type="checkbox"/>
Yes, at faculty/department level	<input type="checkbox"/>
No, not really	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

30.2. Please provide a brief description of how student surveys are used at your institution.

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30.3. Is there a central unit (e.g. planning department, research unit) which analyses the data collected? Please choose one option.

Yes	<input type="checkbox"/>
No, this is handled at faculty/department level	<input type="checkbox"/>
No, but we are planning to set one up	<input type="checkbox"/>
No	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

31. Does your institution collect student feedback/evaluations on the following?

Please choose one option for each item.

	Yes	No
Teaching (through questionnaires or other means)	<input type="checkbox"/>	<input type="checkbox"/>
Support services (e.g. advising, career services)	<input type="checkbox"/>	<input type="checkbox"/>
General learning environment (e.g. classrooms, libraries)	<input type="checkbox"/>	<input type="checkbox"/>

32. Does your institution systematically track the employment of graduates? Please choose one option.

Yes, we regularly track all recent graduates	<input type="checkbox"/>
Yes, but only in some faculties/departments	<input type="checkbox"/>
Yes, we track a sample of graduates	<input type="checkbox"/>
No	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

32.1 If yes, please indicate after which study cycle you track the employment of graduates. Please tick all that apply.

First cycle (Bachelor)	<input type="checkbox"/>
Second cycle (Master)	<input type="checkbox"/>
Third cycle (Doctorate)	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

32.2 If yes, how do you use data from graduate tracking? Please tick all that apply.

It is assessed for strategic purposes and to enhance the quality of teaching provision and services	<input type="checkbox"/>
It is published, for instance on the institution's website	<input type="checkbox"/>
It is used to develop alumni services	<input type="checkbox"/>
Institutions are legally required to track graduates (e.g. as part of funding allocation, external quality assurance)	<input type="checkbox"/>
It is provided to government and/or other relevant national/regional authorities	<input type="checkbox"/>
It is used for marketing purposes/strategic positioning	<input type="checkbox"/>
There is no distinct use	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

33. What do your Bachelor graduates do after graduation? Please provide an estimate or approximate figure, making sure that the numbers provided add up to 100%.

Continue at our institution for a Master in the same discipline	
Continue at our institution for a Master in another discipline	
Start another programme at our institution (e.g. Bachelor, certificate course)	
Leave the institution to work or continue studies elsewhere	
Other – please specify below	
Total	100%
<input type="checkbox"/> If you ticked “other” above, please specify here:	

34. Where do your Master’s students come from? Please provide an estimate or approximate figure, making sure that the numbers provided add up to 100%.

Our institution, same discipline	
Our institution, different discipline	
Other institution, same discipline	
Other institution, different discipline	
Total	100%

35. Have the following increased or decreased since 2010? Please choose one option for each item.

	Increased	Decreased	No change	Information unavailable
Enrolment at Bachelor level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enrolment at Master’s level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enrolment at doctoral level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preference for studies that lead to a professional degree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student drop-out rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students working while studying	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment opportunities for Bachelor degree graduates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment opportunities for Master’s degree graduates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked “other” above, please specify here:				

IV. Study programmes

This section asks for information on changes to study programmes and the introduction of student-centred learning at your institution.

36. Have learning outcomes been developed? Please choose one option.

Yes, for all courses	<input type="checkbox"/>
Yes, for some courses	<input type="checkbox"/>
No, but we intend to develop them	<input type="checkbox"/>
No	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

36.1. If yes, what effect has the introduction of learning outcomes had so far?*Please choose one option for each item.*

	Strongly agree	Agree	Disagree	Strongly disagree
Course contents have been revised	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Course duplication has been reduced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Learning paths have become more flexible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teaching methods have changed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperation among teaching staff has improved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall quality of teaching has improved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examinations have been revised	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition of credits or degrees from other institutions has been enhanced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition of prior learning has become easier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students are more aware of their learning objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student pass rates have improved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

36.2. If no, what have been the reasons for this?

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37. Are professional associations and employers involved in curriculum development? *Please choose one option.*

Yes, they are closely involved	<input type="checkbox"/>
Yes, they are occasionally involved	<input type="checkbox"/>
No, they are rarely or never involved	<input type="checkbox"/>

38. Have the following been implemented at your institution to enhance learning and teaching provision? *Please choose one option for each item.*

	Used throughout the institution	Used in some faculties/ departments	Under discussion	No	Information unavailable
Information and communication technologies (e.g. e-learning, blended learning)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peer learning (i.e. students learning with each other)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teaching in small groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Problem-based or project-based learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internships or work placements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration on learning and teaching with other HEIs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration on learning and teaching with non-HEI partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internationalisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:					

39. Does your institution offer joint programmes with partners in your country?*Please tick all that apply.*

Yes, with higher education institutions that are similar to us (i.e. if you are a university, your joint programmes are with other universities)	<input type="checkbox"/>
Yes, with higher education institutions that are different from us (i.e. if you are a university, your joint programmes are with university colleges)	<input type="checkbox"/>
Yes, with partners that are not higher education institutions	<input type="checkbox"/>
No	<input type="checkbox"/>

V. E-learning

This section inquires to what extent digital or e-learning has been integrated into your institution's learning and teaching mission, and what has been the impact so far.

Note: the term "e-learning" is used as a generic expression for all learning based on the use of information and communication technologies (ICT) to support learning and teaching. This may involve a variety of technologies and tools to support learning in different contexts, ranging from face-to-face settings, distance-learning or a combination of both (usually called blended learning).

40. Does your institution have a strategy or policy regarding e-learning?*Please choose one option.*

Yes, we have a strategy or policy in place	<input type="checkbox"/>
No, but we are developing a strategy or policy	<input type="checkbox"/>
Some faculties/departments have developed their own strategy or policy	<input type="checkbox"/>
No	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

41. So far, what has been your institution's experience with e-learning?*Please tick all that apply.*

It works well	<input type="checkbox"/>
It changes the approach to learning and teaching	<input type="checkbox"/>
It improves the quality of learning and teaching	<input type="checkbox"/>
It takes time to introduce	<input type="checkbox"/>
It is costly, but worth the investment	<input type="checkbox"/>
It is costly and not worth the investment	<input type="checkbox"/>
It is not very flexible	<input type="checkbox"/>
We are not yet certain about the benefits	<input type="checkbox"/>
There are no real benefits	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

42. Which of the following information technology (IT) systems or tools does your institution use or provide for its students? Please choose one option for each item.

	Yes, for all students	Yes, for some students	Not yet, but we are planning to provide this	No	Information unavailable
University email accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wi-fi access throughout the institution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to computer rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online access to libraries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campus licences for software needed by students for their studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online study course catalogue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personalised study portal (registration, transcripts, grades, study plan, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repositories (for course materials, source books, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student portal (general information on course schedules, cancelled classes, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social media to communicate with students or alumni (wikis, blogs, Facebook, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electronic student portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online examinations and tests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:					

43. Does your institution offer any of the following?

Please choose one option for each item.

	Yes, across the institution	Yes, in some faculties	Yes, by some teachers	Not yet, but we are planning to offer this	No	Information unavailable
Online courses						
Online degree programmes						
Blended learning courses (parts of a course are studied in class, others through distance or online learning)						
Blended learning degree programmes (parts of a degree are studied in class, others through distance or online learning)						
Joint online learning offered with other higher education institutions						
MOOCs						
Other – please specify below						
<input type="checkbox"/> If you ticked "other" above, please specify here:						

44. What is your institution's most important objective regarding the development of e-learning in the future? Please choose one option.

To provide more learning opportunities for students who are not based on campus	<input type="checkbox"/>
To provide more learning opportunities for on-campus students	<input type="checkbox"/>
To increase the effectiveness of classroom time (e.g. in-depth learning, critical thinking, individual assessment)	<input type="checkbox"/>
To provide a more flexible learning offer, leaving it to the student to decide whether they learn on or off campus	<input type="checkbox"/>
To provide learning opportunities for adult learners	<input type="checkbox"/>
To enhance internationalisation	<input type="checkbox"/>
We do not intend to develop or extend e-learning in the near future	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

VI. Internationalisation

This section looks at internationalisation as a driver for institutional change. What steps has your institution taken to internationalise? Have these had a significant impact on learning and teaching?

45. Does your institution have an internationalisation strategy? Please choose one option.

Yes, we have a strategy in place	<input type="checkbox"/>
Yes, as part of the general institutional strategy	<input type="checkbox"/>
No, but we are developing a strategy	<input type="checkbox"/>
No	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

46. Where would your institution like to enhance its international attractiveness? Please choose a maximum of three options.

European Union (28 member states)	<input type="checkbox"/>
Eastern Europe (non-EU)	<input type="checkbox"/>
Asia	<input type="checkbox"/>
China specifically	<input type="checkbox"/>
India specifically	<input type="checkbox"/>
Russia specifically	<input type="checkbox"/>
USA/Canada	<input type="checkbox"/>
Latin America	<input type="checkbox"/>
Brazil specifically	<input type="checkbox"/>
Middle East	<input type="checkbox"/>
Northern Africa	<input type="checkbox"/>
Africa	<input type="checkbox"/>
Republic of South Africa specifically	<input type="checkbox"/>
Australia/New Zealand	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

47. Does your institution undertake the following activities to support its internationalisation? Please choose one option for each item.

	Yes	No, but we are planning this activity	No	Information unavailable
Student exchanges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student work placements/internships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff exchanges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Degree programmes taught in English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Degree programmes taught in languages other than English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Summer schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internationalisation at home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International marketing (e.g. through participation in fairs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International student recruitment campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic partnerships with a select number of foreign institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capacity-building projects with partners in developing countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participation in international higher education networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offshore campuses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MOOCs and other types of online learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

48. Do you think that in recent years, internationalisation has contributed to improving learning and teaching at your institution? Please choose one option.

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

48.1. If yes, which of the following has contributed most to the enhancement of learning and teaching? Please choose a maximum of three options.

Staff mobility	<input type="checkbox"/>
Student mobility	<input type="checkbox"/>
International staff	<input type="checkbox"/>
International students	<input type="checkbox"/>
International collaboration in learning and teaching	<input type="checkbox"/>
International research collaboration	<input type="checkbox"/>
Additional income/funding for the institution	<input type="checkbox"/>
Teaching in English	<input type="checkbox"/>
Teaching in other foreign languages	<input type="checkbox"/>
Increased emphasis on language learning	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:	

49. In your view, has internationalisation had any negative effects? Please choose one option.

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

49.1. If yes, please comment briefly on the negative effects of internationalisation at your institution.

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50. Does your institution offer joint programmes with institutions in other countries?

Please tick all that apply.

Yes, at the first cycle (Bachelor)	<input type="checkbox"/>
Yes, at the second cycle (Master)	<input type="checkbox"/>
Yes, at the third cycle (Doctorate)	<input type="checkbox"/>
Yes, in other non-degree activities	<input type="checkbox"/>
No	<input type="checkbox"/>

50.1. If yes, what are the main challenges associated with these programmes? Please choose one option for each item.

	Not at all challenging	Somewhat challenging	Very challenging	Extremely challenging	Information unavailable
Integration of programmes into the institution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality assurance process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legislative constraints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sustainability of funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Differences in fee structures between partner institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional work for staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Imbalanced mobility between partner institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low student interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language barriers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – <i>please specify below</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:					

VII. Quality assurance, qualifications frameworks and recognition

This section considers structures for quality assurance (QA) and the recognition of credits and degrees at your institution, as well as the impact of qualifications frameworks.

51. Does your institution have an institutional quality assurance policy and system?

Please choose one option.

We have an institutional QA policy and an integrated approach to QA at institutional level	<input type="checkbox"/>
We have an institutional QA policy, but the QA systems are faculty/department based	<input type="checkbox"/>
Both QA policy and systems are faculty/department based (i.e. there is no institutional approach)	<input type="checkbox"/>
We have a QA policy, but the QA processes are being developed	<input type="checkbox"/>
We have QA processes in place, but no QA policy	<input type="checkbox"/>
We neither have a QA policy nor a QA system	<input type="checkbox"/>

52. Do your students participate actively in quality assurance activities (i.e. as members of university or faculty QA committees)? Please choose one option.

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

53. Has your institution (or a unit within it) been evaluated, audited or accredited in the last five years by a foreign quality assurance agency? Please choose one option.

Yes, as a mandatory evaluation (replacing the evaluation by our national QA body)	<input type="checkbox"/>
Yes, as a non-mandatory evaluation (in addition to the mandatory evaluation carried out by our national QA body)	<input type="checkbox"/>
No, but we are considering it	<input type="checkbox"/>
No	<input type="checkbox"/>

53.1 If yes, what were your criteria for choosing a foreign quality assurance agency? Please choose one option for each item.

	Very important	Somewhat important	Not so important	Not at all important
Agency's international reputation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency's expertise in a specific field/discipline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency's methodological approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affordability of the service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Better recognition of degrees abroad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency's geographical proximity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency's working language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency is a member of ENQA*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency is registered in EQAR**	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:				

*European Association of Quality Assurance Agencies

** European Quality Assurance Register

54. Does your institution have an institutional policy or guidelines for the recognition of credits and degrees? Please choose one option.

Yes	<input type="checkbox"/>
No, but we intend to develop a policy or guidelines	<input type="checkbox"/>
No	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

55. In your institution, who is responsible for recognition decisions on the following? Please tick all that apply.

	A central office	Faculty	Department	Individual academic teachers	Other – please specify below	Information unavailable
Degrees from other institutions in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Degrees from abroad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Periods of study in other institutions in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Periods of study abroad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition of non-formal and informal learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:						

56. Does your institution recognise prior learning? *Please tick all that apply.*

Yes, as a part of an alternative admission procedure (i.e. prior learning could replace the formal secondary school entry qualification requirements)	<input type="checkbox"/>
Yes, as a way of gaining credits which count towards a study programme	<input type="checkbox"/>
Yes, as equivalent to a full degree (i.e. on the basis of prior experience that is seen as equivalent to a Bachelor degree, students could enter a Master's programme)	<input type="checkbox"/>
No	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

57. How many students returning to your institution from study abroad encounter problems with credit recognition? *Please choose one option.*

Fewer than 5% have problems	<input type="checkbox"/>
Fewer than 50% have problems	<input type="checkbox"/>
Over 50% have problems	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

57.1 Are these recognition problems associated with certain faculties or are they encountered across the institution? *Please choose one option.*

Situated in certain faculties	<input type="checkbox"/>
Found across the institution	<input type="checkbox"/>

57.2 Please provide a brief description of the recognition problems encountered at your institution.

--

58. Do you evaluate your recognition procedures regularly? *Please choose one option.*

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Information unavailable	<input type="checkbox"/>

58.1 If yes, how are they evaluated?

--

59. Do you have a national qualifications framework (NQF)? *Please choose one option.*

Yes	<input type="checkbox"/>
Yes, but it is not yet in use	<input type="checkbox"/>
No	<input type="checkbox"/>

59.1. If yes, do you find it useful in relation to the following? Please choose one option for each item.

	Very useful	Somewhat useful	Not so useful	Not useful at all
Promoting transparency and comparability between degrees and across education sectors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting the development of learning outcomes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancing international mobility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assuring the quality of education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting the recognition of prior learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promoting lifelong learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancing employability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify below	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> If you ticked "other" above, please specify here:				

60. Would you or one of your colleagues be available to answer any follow-up questions to this survey on the phone?

Yes, please contact me for future queries	<input type="checkbox"/>
Yes, please contact my colleague for future queries	<input type="checkbox"/>
No	<input type="checkbox"/>

61. If we may contact you, please confirm your contact details and provide us with your telephone number.

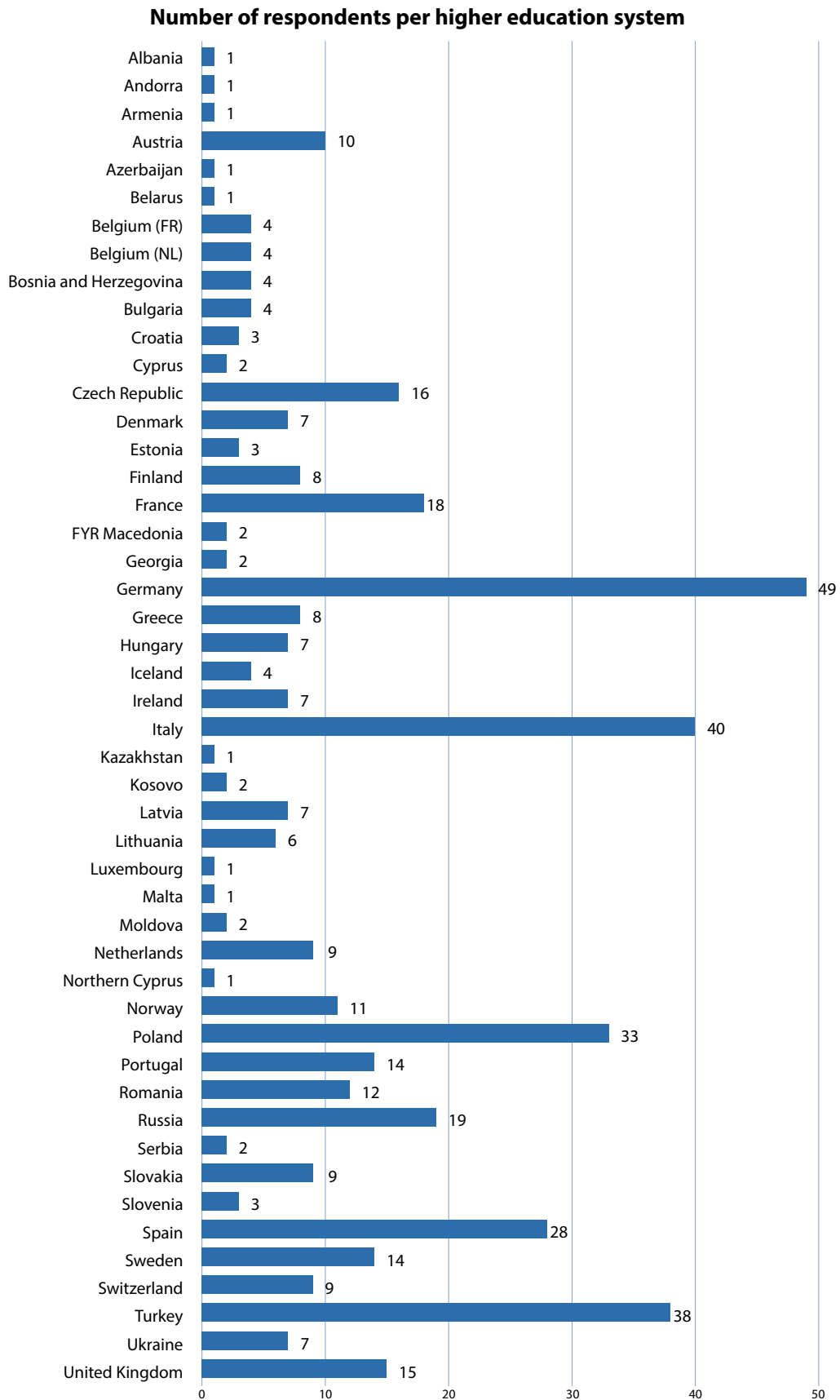
First name:
Last name:
Position:
E-mail:
Telephone:

62. If we may contact your colleague, please provide his or her contact details.

First name:
Last name:
Position:
E-mail:
Telephone:

2. Country distribution of Trends 2015 respondents

Figure 29: Trends respondents per country



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Databases

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EUROSTAT

<http://ec.europa.eu/eurostat>

UNESCO

<http://data.uis.unesco.org/index.aspx?queryid=142&lang=en>

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