



Trends 2003

Progress towards the European Higher Education Area

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Summary

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Executive Summary

Aims of the study

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

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

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

Awareness and support of the Bologna Process

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

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

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

The role of HEI in the Bologna Process

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

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

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

The role of students in the Bologna Process

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

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

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

Academic quality and graduate employability as compatible aims

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

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

Promotion of mobility in Europe

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

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

Public funds for mobility have been increased in the majority of EU countries but only in a minority of accession countries. However, the number and level of mobility grants for students is

not sufficient to allow for equal access to mobility for those from financially less privileged backgrounds.

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

Attractiveness of the EHEA and the national higher education systems

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

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

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

Higher Education as a public good

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

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

Higher Education in the GATS

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

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

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

Degree structures, qualification frameworks and curricula

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

As for the HEIs, 53% have introduced or are introducing the two-tier structure while 36% are planning it. In other words, **almost 90% of HEIs in the Bologna countries have or will have a**

two-tier structure. Only 11% of HEIs see no need for curricular reform in this process. About 55% of HEIs in SEE have not yet introduced the two-tier structure.

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

Europe is divided in two halves regarding the organisation of these third-tier doctoral studies. In half of the countries, doctoral students receive mainly individual supervision and tutoring, while in the other half, taught doctoral courses are also offered in addition to individual work. HEIs still face the challenge of how to cooperate, with the support of governments, at doctoral level nationally and across Europe, and whether or not this should involve **the setting-up of structured doctoral studies, particularly in interdisciplinary and international settings.**

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

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

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

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

Joint Curricula and Joint Degrees

Joint Curricula and Joint Degrees are intrinsically linked to all the objectives of the Bologna Process and have the potential to become an important element of a truly European Higher Education Area. Nevertheless, and in spite of the appeal in the Prague Communiqué, Joint

Curricula and Joint Degrees still do not receive sufficient attention, as is confirmed by the fact that most Ministries and Rectors' Conferences attach only medium or even low importance to these. More than two thirds of the Ministries claim to give some kind of financial incentive to the development of Joint Curricula/Joint Degrees but the extent of such support is not known.

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

HEIs and national higher education systems in the EHEA would lose an enormous opportunity to position themselves internationally if they were not to focus their attention more than before on systematic – including financial - support for the development of Joint Curricula/Joint Degrees.

Of course, such support would entail amendments and changes in the existing higher education legislation of many countries, as **in more than half of the Bologna Process countries, the legislation does not yet allow the awarding of Joint Degrees**. It would also call for the elaboration of agreed guidelines and definitions for Joint Curricula/Joint Degrees, both at national and European level, and would rely on enhanced networking between the HEIs themselves.

Recognition

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

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

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

Two thirds of the Ministries, more than half of the HEIs and slightly less than 50% of the student associations expect that the Bologna Process will greatly facilitate academic recognition procedures. While HEIs are rather optimistic with regard to the smoothness of recognition

procedures of study abroad periods, in many countries, however, institution-wide procedures for recognition seem to be quite under-developed, and the recognition of study abroad periods often takes place on a case-by-case basis. Even where formal procedures exist, students, as the primarily concerned group, often say they are unaware of these. Almost 90% of the students' associations reported that their members occasionally or often encounter recognition problems when they return from study abroad.

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

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

Credits for transfer and accumulation

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

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

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

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

Autonomy and Quality Assurance

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

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

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

Internal quality assurance procedures seem to be just as widespread as external ones and mostly focus on teaching. 82% of the heads of HEIs reported that they have internal procedures to monitor the quality of teaching, 53% also have internal procedures to monitor the quality of

research. Only a quarter of the HEIs say they have procedures to monitor aspects other than teaching and research. At the moment, however, internal procedures are not yet developed and robust enough to make external quality assurance superfluous.

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

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

Lifelong learning

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

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

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

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

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

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

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

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

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

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

Diversification of institutional profiles

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

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

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

CONCLUSIONS: TOWARD SUSTAINABLE REFORMS OF HIGHER EDUCATION IN EUROPE?

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

1. HOLISTIC BOLOGNA

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

2. SYSTEMIC BOLOGNA

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

3. AMBIVALENT BOLOGNA

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

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

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

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

4. FURTHERING BOLOGNA

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

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

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

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

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