Center for Higher Education Policy Studies

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The Bologna Process Independent Assessment

The first decade of working on the European Higher Education Area

Executive summary, overview and conclusions

The Bologna Process Independent Assessment reports

The consortium of CHEPS, INCHER-Kassel and ECOTEC have made an assessment of major elements of first decade of the Bologna Process in order to obtain an independent view on the progress of the Bologna Process.

The **current volume** contains the **Executive summary and major conclusions from the assessment**.

The study is published in two volumes online, the detailed assessment report (volume 1) and the case studies and appendices (volume 2). They are available on http://ec.europa.eu/education/higher-education/doc1290_en.htm
and through the CHEPS website: www.utwente.nl/cheps/publications.

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The first decade of working on the European Higher Education Area

The Bologna Process independent assessment
Executive summary, overview and conclusions

Authors

Don F. WESTERHEIJDEN corresponding author: d.f.westerheijden@utwente.nl	CHEPS
Eric BEERKENS	Nuffic
Leon CREMONINI	CHEPS
Jeroen HUISMAN	University of Bath
Barbara KEHM	INCHER-Kassel
Aleksandra KOVAČ	CHEPS
Predrag LAZETIC	INCHER-Kassel
Andrew MCCOSHAN	ECOTEC
Neringa MOZURAITYTĖ	ECOTEC
Manuel SOUTO OTERO	University of Bath
Egbert DE WEERT	CHEPS
Johanna WITTE	IHF, München
Yasemin YAGCI	INCHER-Kassel

Project supervision

Jürgen ENDERS	CHEPS
Jon FILE	CHEPS

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Executive Summary

Aims of the assessment study

This assessment study was contracted out by the European Commission and the Bologna Follow-Up Group (BFUG), to assess the extent to which the *operational objectives* of the Bologna Declaration of 1999 and subsequent communiqués have been achieved in the areas of curriculum reform, quality assurance, qualifications frameworks, recognition, mobility and social equity. It also evaluated the extent to which the operational objectives have led to the achievement of the *strategic objectives* of the Bologna Declaration, i.e. 'to establish the European area of higher education and to promote the European system of higher education world-wide'. The management of the Bologna Process was also included in the study. An international consortium of researchers undertook the project from 2008-2009. The study is *not* an evaluation of the *entire* Bologna Process as not all aspects of the process were identified as focal areas for the study.

Assessments were made against official statements of goals in the selected action areas taken from the Bologna Declaration and subsequent communiqués; the study was therefore limited to the collective level of the European Higher Education Area (EHEA) and to national implementation. Experiences of higher education institutions or of students could only be glimpsed intermittently.

Overall assessment

Overall, higher education across the 46 EHEA countries looks substantially different from 10 years ago—perhaps with the exception of the social dimension. Most 'architectural' elements of the EHEA, i.e. those involving legislation and national regulation, have been implemented in most countries. The impact of the established architecture on substantive goal achievement at the level of higher education institutions and study programmes is still wanting; however, institution-level impacts are not easily shown in our assessment of goal achievement at the level of the EHEA and countries.

The extent to which the key objectives of compatibility, comparability and attractiveness will be achieved is still partly an open question. First, it is too early to answer the question because achieving some of the desired outcomes will require many years of post-implementation experience (especially labour market effects and effects involving all three cycles). Second, even among highly performing countries, compatibility and comparability have not yet been fully achieved. Third, the operation of the intergovernmental process has emphasised policy initiatives and plans: the crucial question about outcomes of the process in terms of its key objectives (compatibility, comparability, attractiveness) has not been addressed to the same extent.

Most of the 46 countries have adopted new higher education legislation to introduce and regulate elements of the Bologna Process. Many countries have allocated additional funds for the implementation of new Bologna policies. The European Commission has also supported projects for the introduction of reforms.

There is a large difference in the speed of implementation between individual countries. While some countries have shown considerable progress in implementing almost all action areas, other countries have still to start on some. This creates a European Higher Education Area of different speeds of implementation and varying levels of commitment. Even the most 'advanced' countries have struggled with the implementation of at least one of the Bologna elements: there is no case of high performance across *all* elements. Newcomer countries (17 countries joined in 2001–2005, mostly in the East and South-East of the region) had to struggle to catch up with many—though not all—of the early starters.

The countries participating in the Bologna Process faced different challenges in their higher education systems, ranging from inefficiencies (e.g. high drop-out rates, low participation rates across a variety of dimensions) to limited systemic flexibility, and upgrading quality during rapid expansion. These different starting points, coupled to different management and governance arrangements, meant that the implementation of national reforms deviated from Bologna intentions. Divergence has been strengthened by the fact that key actors in different countries interpreted elements of the Bologna reform agenda differently.

In national implementation policies, the involvement of stakeholders in various stages of the policy process has had a positive impact, as have strong links between national and European-level actors. Where higher education systems were already in line with some elements of the Bologna 'model' (e.g. degree structure, qualifications frameworks), countries were able to focus more swiftly on in-depth implementation issues. A balanced mixture of supporting policy mechanisms (funding, regulation, policies in other areas, communication and information exchange) appeared to be crucial to the successful implementation of Bologna reforms.

Especially amongst countries that were relatively new to the Bologna process, a lack of resources and expertise to guide and influence the domestic policy process and subsequent implementation were significant handicaps.

Achieving the European Area of Higher Education

In all EHEA countries, many learners now have the option to continue second or third cycle studies in other institutions in the same country or in other EHEA countries. Yet establishing a fully transparent higher education area requires further efforts in the areas of recognition and student support.

Student mobility within the EHEA did not increase substantially in the period up to 2007 (the latest year for which comparable statistics were available). The main change between 1999 and 2007 was from short-term credit mobility (by 'free movers' and learners moving within the framework of European, national or regional programmes) to degree mobility. There was an absolute rise of 39%, equalling a relative increase of 4% (relative increase takes the growth of the student population into account) to the point where 2.0% of EHEA learners were pursuing a degree in another EHEA country. There is an east-to-west imbalance of student mobility within Europe. The imbalance may call the sustainability of student mobility into question.

Promoting the European system of higher education world-wide

Mobility from other parts of the world towards the EHEA has increased substantially and faster than international mobility has grown worldwide. Together, the EHEA countries attracted 30% of the world's foreign learners in 2007. Yet for internationally mobile learners the EHEA has little reality; they choose to study in countries and institutions without considering if they are part of the EHEA. Equally the EHEA is not seen as an area providing a uniform level of higher education degrees and the USA remains the most prestigious destination, attracting the top tier of learners (e.g. from China).

Cooperation of different types between higher education institutions from EHEA countries and counterparts abroad (e.g. Africa, Latin America) has increased.

The Bologna Process has become a major focus of attention for regional and sometimes also national higher education policy-making around the world (e.g. in China and in the USA).

Assessments of action areas

Degree and curriculum reform

All countries have adopted two-/three-cycle degree systems, with a range of 180–240 credits (in ECTS) for the first and 60–120 credits for the second degree. This goal has thus been fully achieved. The combination '180+120' credits (or in years of full-time study: '3+2') emerged as the prominent model in Europe, while there is flexibility to accommodate variations of the model. However, the percentage of learners studying in two-cycle programmes was below 50% in seven systems, including two large countries (Germany, Russia). Partly this reflects ongoing transition, especially in the four countries that joined the Bologna Process recently, but may indicate problems with the degree reforms if these percentages do not rise quickly.

Doctoral degrees have become more structured than before the Bologna Declaration in many countries; a diversity of models continues to exist as intended, and a nominal length of 3-4 years is the most common duration.

Short-cycle degrees of different nature, (mostly) connected to different cycles, were maintained or introduced in 26 countries' higher education systems.

All higher education systems use the European Credit Transfer and Accumulation System (ECTS), are in transition towards it, or use ECTS-compatible systems. This goal has been substantially achieved at the level of regulation, but the degree of use of ECTS in institutions and programmes needs attention, as well as linking allocation of credits to student workload and learning outcomes, which has been attained in only 12 higher education systems. In 13 systems 90% or more of study programmes have been modularised and there is no common understanding of the concept of 'modularisation' as a tool to foster mobility, flexibility and transferability. Curriculum reform has only been partly achieved and needs attention.

Quality assurance

The European Standards and Guidelines (ESG) for quality assurance have been adopted (2005). The Register of quality assessment agencies (EQAR) is established and operative (2008). All countries except one apply internal and external quality assurance on a system-wide scale; the extent to which these quality assurance systems (also in the higher education institutions) substantially comply with the ESG must be evaluated in the coming years. Applying compatible quality assurance systems does not guarantee the delivery of compatible quality of education. The latter must result from combining meaningful learning outcomes (ECTS) and qualifications frameworks (QF-EHEA and NQF).

The perceived diversity between countries in the quality of education being delivered needs to be reduced to achieve a coherent higher education system in the EHEA.

Qualifications frameworks

An overarching framework of qualifications for the European Higher Education Area (QF-EHEA) has been adopted (2005). Eight higher education systems have self-certified national qualification frameworks; the others should be finished by 2012. The extension of the deadline (originally it was 2010) shows that more effort is needed.

Actual impact of the qualifications frameworks (QF-EHEA and national qualifications frameworks) and the recent developments in quality assurance (the ESG) on the quality of higher education will depend on curriculum reform by higher education institutions.

Recognition policies

All Bologna countries except two have signed or ratified the Lisbon Recognition Convention (LRC); five have signed and ratified the LRC but their legislation is not in compliance with the LRC and 39 countries have signed and ratified the LRC and their legislation complies with the provisions of the LRC. This progress in (almost) achieving the official adoption of the LRC has shifted the discussion to realising the impacts intended by the measures. There are different interpretations of 'substantial differences' and other terms and practices around recognition, in particular the use of learning outcomes as a determinant for recognition. While room for interpretation is necessary, this creates uncertainty and requires more attention.

The Diploma Supplement is issued automatically and free of charge in most higher education institutions in 30 out of 46 countries. This needs further attention in the other 16 countries and in the remaining higher education institutions in the 30 countries. Awareness of the existence and meaning of the Diploma Supplement among learners and employers needs to be improved.

Policies for flexibility and widened participation: the social dimension

Since targeted social dimension actions started only recently in the Bologna Process, we can only give a short overview of the current situation. 39 higher education systems report underrepresentation of certain groups in their student body. Most commonly underrepresented groups include those from lower socio-economic backgrounds, and

people coming to higher education through non-traditional educational routes. Female learners are underrepresented in science and technology programmes in almost all countries, as well as in the second and third cycles of studies.

Policies suitable to widen participation and successful completion of studies such as recognition of prior learning (RPL), flexible study modes, counselling for learners and financial aid are available to varying degrees in varying numbers of countries (around one third would be the typical proportion for each of these policies). From the few available data, we could not conclude that these policies have been introduced with the aim of improving inclusion of underrepresented groups, or have been effective in this regard. There were very few signs of the social dimension being seen as a priority area in most Bologna Process countries, but from countries that have a good representation of all social groups in higher education we learned that successful social dimension policies need long, sustained effort.

Key challenges for the next years

Attention in the second decade of the Bologna Process needs to turn to the achievement of the substantive, strategic goals more than to further refinement of the architecture. Greater involvement of staff within higher education institutions and other non-state actors may be a key factor for successfully embedding many Bologna action areas in the practice of education. The capstone of the architecture and the bridge to focusing on the compatibility of the outcomes of education are national qualifications frameworks (NQFs). Their implementation in higher education institutions should make the common goals of the EHEA clearer to teachers and learners, showing a positive gain for teaching and learning. The NQFs are now on the critical path of the implementation of the EHEA and their completion by 2012 is necessary to make the EHEA a positive reality by 2020.

We have noticed a tendency to place highly relevant but broad and complex issues on the Bologna Process agenda, in particular the social dimension. Addressing such broad questions requires a patient and realistic approach to implementation, including concrete action lines.

There are different speeds in the implementation of the Bologna Process action areas across the 46 countries. This has to do with varying national agendas, with when different countries joined the Bologna Process, with differences in the distribution of authority nationally, with different experiences and traditions regarding higher education policy making, as well as with differences in resource levels that especially affect newcomer countries that have limited possibilities to obtain EU support.

A challenge for the Bologna Process is to keep up the political momentum and the interest of political leadership in the reform processes. This is needed to minimise the risk of the process becoming administration without much impact on the reality of higher education.

1 Goals and methodology

1.1 Aim of the study

The Independent Assessment of the Bologna Process was contracted out by the European Commission in cooperation with the Bologna Follow-Up Group (BFUG) in order to obtain an independent view on the progress of the Bologna Process in terms of:

- appraising the achievement of the *operational objectives* of the Bologna Declaration and subsequent communiqués, in particular in the areas of curriculum reform, recognition, quality assurance and mobility
- evaluating the extent to which the operational objectives have led to the achievement of the *strategic objectives* of the Bologna Declaration, i.e. 'to establish the European area of higher education and to promote the European system of higher education world-wide'.

We studied major aspects of the Bologna Process, focusing on the areas mentioned above as well as, at the request of the study's Advisory Board (representing the Bologna Follow-Up Group), the social dimension, the dynamics and management of the Process and the global dimension (see Table 1-1). The study is *not* an evaluation of the *entire* Bologna Process as not all aspects of the process were identified as focal areas for the study.

Table 1-1 Main elements of the study

Areas of action	*Operational and intermediate goals*	*Strategic goals*
Degree and curriculum reform (incl. ECTS, DS) Cooperation in Quality assurance Qualifications frameworks Recognition policies	Increased mobility	Compatibility and comparability of higher education systems in the EHEA
Policies for flexibility and widened access Management of the Bologna Process	Equality and equity of participation	Attractiveness and competitiveness of European higher education

1.2 Methodological approaches and constraints

The study's methodology consisted of the selection of objective, comparable indicators at the higher education system-level across as many of the EHEA countries as was feasible, beyond the policy-related data of the BFUG's regular *Stocktaking* (Rauhvargers, Deane, & Pauwels, 2009; Stocktaking Working Group 2005-2007, 2007; Working group, 2005), the

national reports underlying those studies, etc. in order to get an independent view of the different action areas and what has been achieved within them.[1] The study involved: desk research into existing studies from sources other than data collected by the Bologna Process participants; additional data collection to assemble statistics and qualitative indicators; twelve case studies (six country-wide; six thematic across three countries each); over 165 interviews for the case studies and on the management of the Bologna Process; and finally a nine-person International Expert Panel that contributed an international perspective on the Bologna Process and its achievements. Indicators drawn from *Stocktaking 2009* data and other studies were verified by higher education research experts, who also updated the information to reflect the 2009 situation and supplied much of the missing information on indicators that we had drawn from studies that did not cover all 46 countries. The experts were selected from the higher education research community; the major selection criterion was that they have no leadership role in implementation of the Bologna Process.

The assessment of the management of the Bologna Process at the European level is based mainly on interviews conducted in 2009 with selected national representatives in the Bologna Follow-Up Group and with representatives of consultative members in the follow-up structures. Interviewees were selected who had long experience in Bologna follow-up structures. The assessment tackles process management and dynamics at the European level (mainly the BFUG) and does not assess the management and dynamics of the implementation of the Bologna Process goals and means in different national contexts.

We studied the *effects* or *impacts* of the Bologna Process (strategic goals), as well as looking at the *implementation* process (operational goals) at the level of the Bologna Process as a whole. This is a task fraught with difficulties. First, the strategic goals of the Bologna Process have not been quantified. Quantified goals are much easier to measure than broad goal formulations. However, not quantifying the strategic goals as well as many intermediate ones was not an omission but a necessity in this intergovernmental process; setting deadlines for implementation of several action lines was already an achievement. The Bologna Process is not a single, fixed policy that can be 'assessed' in an ordinary sense, since its goals were often stated as general principles, subject to countries' interpretations, and goals were added or changed over time as experience and insight increased. Finding, defining and agreeing goals were important parts of the Bologna Process; leaving the interpretation of the goals and the choice of means to the participating countries is an essential characteristic of a voluntary international policy process. Our assessment is based on the current understanding of the main goals of the Bologna Process, taking their dynamism into account as well as the principle that interpretation and implementation is mainly the work of sovereign countries, along with agencies and higher education institutions within those countries. We recognise that the role of European bodies such as the European Commission and of intergovernmental structures such as the Bologna Follow-Up Group is primarily one of coordinating and supporting the activities of sovereign countries.

The second major challenge to address in the assessment is that other reforms and policies besides the Bologna Process also play a role in achievements, results and impacts. Methodologically, this raises the question of how much of the change over the past decade

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[1] The original 'action lines' have changed over the years, so we mostly refer to 'action areas'.

in the 48 higher education systems in the 46 EHEA countries [2] can be attributed to which policy.

The third issue stems from the fact that although the Bologna Process started over 10 years ago, many countries joined later, some action lines started later, and some countries needed more time to implement policies for internal reasons: implementation can therefore be expected to be still incomplete. Some policies need considerable time before they create an impact: e.g. in many countries in 2009 very few learners have had the experience of completing a new first cycle study programme and entering the labour market or continuing to a second-cycle programme. The extension of the Bologna Process to 2020 was a logical choice to enable the in-depth implementation of its current goals across all of the participating countries.

The final important challenge concerns the availability and comparability of data across all EHEA countries which was poor, especially on the social dimension and on crucial indicators of mobility.

With these caveats in mind, the following sections of this report outline our assessment of the progress made over the past decade across the different aspects of the Bologna Process that we were asked to focus on. To the extent that the focal areas of the different sections permit, we have structured the assessment in each chapter around the following questions:

- Which main goals were formulated in the course of the Bologna Process?
- What was the situation ten years ago, before the Bologna Declaration?
- What progress has been made over the past decade in terms of the objectives of the Bologna Process?
- How do we assess the current situation in terms of goal achievement?
- Which actions, reforms and policies have proved to be successful?
- Which actions, reforms and policies have proved to be less successful?

Two sections fall somewhat outside this structure. One concerns the strategic question of how far all of this has moved the EHEA towards its goal of becoming more attractive, where we also look at the global dimension of the Bologna Process. And we visit six case studies of 'highly achieving' countries to try to identify some conditions for the success in those countries in implementing the action areas we have studied.

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[2] Belgium (Dutch and French speaking communities) and the UK (England/Wales/Northern Ireland and Scotland) reported as two different higher education systems in a number of respects. Therefore, part of our statements will be about 48 higher education *systems*, others about 46 *countries*.

2 Assessments and conclusions

2.1 The assessment of degree and curriculum reform

Stated goals

Degree reform

- Adoption of a system based on two main cycles, undergraduate and graduate, with the first cycle lasting a minimum of 3 years (1999); later extended to three cycles (2003);
    - Credits for the first degree should range between 180 and 240 credits in the European Credit Transfer and Accumulation system (ECTS), for the second degree between 90 and 120 credits, with a minimum of 60 credits (QF-EHEA 2005);
    - No goal was formulated regarding student enrolment in the two-cycle structures, but by aiming at implementation by 2010 (1999), transition of the large majority of learners to these structures was an implicit aim.
- On short cycle programmes, no goal was stated; the possibility to introduce or maintain them was left to countries (2005).
- Doctoral education: need for structured doctoral programmes, normal workload of 3-4 years, no overregulation of doctoral education (2005); developing and maintaining a wide variety of doctoral education.
- Within each cycle, opportunities for mobility shall be created in the structure of degree programmes (2009).

Curriculum reform

- The establishment of a credit system such as the ECTS as a means of promoting student mobility (1999), of greater flexibility and transferability (2001) and of international curriculum development (2003);
    - Establishment of the ECTS is meant to promote greater flexibility and transferability (2001); this implies tri-/semesterisation, modularisation of study programmes and a fair proportion of elective courses. (This point is further connected to our chapter on widening participation.)
    - Proper implementation of ECTS based on learning outcomes and student workload (2007); in connection with national qualifications frameworks (2003; QF-EHEA 2005);

What was the situation ten years ago, before the Bologna Process?

Degree reform

- Degree structures were a completely national matter, the spectrum of national models and their internal logics was immense. While more than half of the national systems (30) had a type of two-cycle structure pre-Bologna, these were not necessarily 'Bologna-type' structures.

- Systems with long first-cycle degrees often had their first degrees located at Master's-level, while systems with two cycles tended to view even long first degrees from abroad as being at Bachelor's level. This was particularly an issue between European and US higher education.

- For learners from outside Europe, it was difficult to enter into European higher education directly at graduate level in systems without two cycles. This was often only possible on the basis of individual arrangements for credit recognition.

Curriculum reform

- ECTS was used as a transfer instrument in the context of international student exchange only to a very limited extent, mainly within the Erasmus programme, and not more broadly as an instrument to make curricula more learner-centred and flexible. The idea that higher education curricula should be modularised was not shared across Europe.

- Discussions on curricular reforms, the general direction such reforms should take, and learner-centredness and flexibility as guiding principles for such reforms had advanced in only a few countries (e.g. in the UK).

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

Degree reform

- All higher education systems in the EHEA today display some form of two-cycle structure. Also many pre-Bologna two-cycle structures have been adapted in the context of the Bologna Process. Twenty systems reported that they allow various combinations. The single model most commonly adopted in practice in 19 higher education systems is a first degree of 180 credits and a second degree of 120 credits (180+120 credits, or 3+2 years of full-time study). However, in these systems several combinations are often legally possible. Only a small minority of countries have opted for other main models: 240+120 credits (5 systems), 240+60 credits (1 system), or 180+90 credits (1 system).

- In 36 European higher education systems, certain fields of study are exempted from the Bologna-type two-cycle structure. The subjects most commonly exempted include medicine (31), dentistry (29), veterinary studies (23) and pharmacy (20 systems).

- In 29 systems, 90-100% of learners study in 'Bologna-type' structures. In seven Bologna member states less than 50% of the learners are studying in reformed degree programmes, among them two large systems—Germany and Russia.

- Doctoral programmes have been subject of attention since 2003. Variety in doctoral studies continues to exist, as intended by ministers.

- Short-cycle degrees are present in 26 higher education systems. The role and (quantitative) importance of this qualification level varies, but is substantial in a good handful of European higher education systems (esp. Cyprus, France, Latvia, Luxembourg, Spain, Turkey and UK-Scotland).

Curriculum reform

- Nearly all systems (43) use ECTS or are in transition towards it (Spain and Turkey); the few exceptions all use ECTS-compatible systems (Latvia, Lithuania, Sweden, and the UK-E/W/NI and Scotland).

- There is today a common European discourse on curriculum reform, in which concepts such as student workload and learning outcomes (see also the section on the qualifications frameworks, below) play a key role. The aim of moving from a teacher-centred to a learner-centred approach to curriculum design is widely shared among the countries.

Overall assessment

Degree reform

- All countries have implemented a two-cycle system with the first cycle lasting a minimum of three years. This goal has been fully achieved.

- All countries adopted a credit range of 180-240 credits for the first and 60-120 credits for the second degree. This goal has been fully achieved.

    - As no explicit standard was formulated for the cumulative number of credits needed for the award of the second degree, the existing variety (from mostly 240 to 360 credits) does not diminish goal achievement.

- The percentage of learners studying in the first two cycles is below 50% in seven systems. This needs attention. Whether this reflects ongoing transition (especially in the five countries that joined the Bologna Process recently) or deeper problems with the two-cycle structure in these countries should be evaluated.

- Certain knowledge areas (above all in the medical field) are exempted from the reforms in a substantial number of countries but included in others. This may call for a clarification of the possibilities and goals of (two-/three cycle) programmes in these fields.

- Short programmes of different types have been included in 26 higher education systems in different cycles; in eight higher education systems they cater for more than 15% of learners.

- Doctoral degrees have become more structured than before the Bologna Declaration in many countries; a diversity of models continues to exist as agreed, and a nominal length of 3-4 years is the most common duration.

Curriculum reform

- All higher education systems use ECTS, are in transition towards it, or use ECTS-compatible systems (see above). This goal has been substantially achieved at the level of regulation.

    - The degree of use of ECTS in institutions and programmes needs attention. The majority of participating systems (28) apply ECTS (or a compatible system) across the board, but six systems use it in less than 75% of non-doctoral programmes.

  - Only 12 systems use both student workload and learning outcomes as the basis for the allocation of credits. Proper and system-wide use of ECTS needs further attention.

- In only 13 systems 90% or more of study programmes have been modularised and there is no common understanding across all EHEA countries of the concept of 'modularisation' as a tool to foster increased mobility, flexibility and transferability. This goal has only been partly achieved and needs attention.

- While no explicit goal regarding the proportion of elective courses in a typical degree programme was formulated, the fact that 21 systems typically have less than 25% of electives in a degree programme requires attention in light of the aims of greater learner-centeredness and flexible, more individually tailored learning paths.

Which actions, reforms and policies have proved to be successful?

Degree reform

- Many European countries significantly adjusted their degree structures in the context of the Bologna Process. There was a widespread readiness to accept the need for more compatibility in the diversity of European higher education systems at the turn of the century.

- Without any standard-setting in this area, '180+120 credits' (or in years of full-time study: '3+2') emerged as the prominent model in Europe, while allowing for enough flexibility to accommodate other needs through variations of this model.

- The Bologna Process was flexible enough to accommodate the short-cycle degrees that were maintained or introduced in many countries' higher education systems.

Curriculum reform

- From the same motivation for compatibility that led countries to accept degree reform, ECTS (or compatible systems) and modularisation were almost universally accepted as the preferred way to organise course units within the curriculum—with sometimes profound changes to curricula that affect all learners. However, beyond approval in principle, their implementation is not yet complete.

- The Bologna Process has made Europe a major area in the world for generating ideas and instruments for curriculum reform to tackle the needs of today's knowledge societies. Other regions are very interested to learn from the EHEA in this respect.

Which actions, reforms and policies have proved to be less successful?

Degree reform

- No standard for the length of first and second degrees has been formulated at a European level: credit ranges were agreed (180–240 credits + (60)90–120 credits in general) and connected to learning outcomes (qualifications frameworks). Whether the absence of a uniform credit size per cycle is seen as a deficiency, strength or just a fact depends on one's interpretation of the goals of 'comparability' and 'compatibility'. It also depends on the degree of tolerance for differences before they are called

'substantial', and on the application of competence-orientation (learning outcomes) in the recognition practices of degrees throughout the EHEA.

- In many countries, Bologna-type two-cycle structures were not seen as suitable for certain subjects, predominantly in the medical field. Some countries have implemented Bologna-type models even in this area (e.g. the Netherlands, Switzerland), while systems with a long tradition of two-cycle structures (e.g. Ireland, the UK) have not included medicine and other subjects among their two-cycle programmes. Further systematic European-wide discourse on this issue might be useful, especially on goals and options for first-cycle graduates.

Curriculum reform

- Many systems still struggle with two 'text-book concepts' in the implementation of ECTS: 'student workload' and 'learning outcomes'. Only in 12 systems is ECTS being applied on the basis of both concepts. Using both requires significant paradigm shifts amongst academics and not merely technical adaptations.

- In six systems that have accepted ECTS as the national credit system, it is used in less than 75% of study programmes. In this area implementation is still ongoing.

- Where modularisation and ECTS have been implemented, it is not yet clear whether they have contributed to facilitating student mobility and flexibility in individual study paths. In some countries, such as Austria and Germany, recent student protests have occurred partly because learners hold that the contrary is the case.

2.2 The assessment of cooperation in quality assurance

Main goals stated

- Promotion of European co-operation in quality assurance with a view to developing comparable criteria and methodologies (1999).

- An agreed set of standards, procedures and guidelines on quality assurance, to explore ways of ensuring an adequate peer review system for quality assurance and/or accreditation agencies or bodies (2003).

- A European register of quality assurance agencies (EQAR) based on national review (2005).

What was the situation ten years ago, before the Bologna Process?

- Most countries had introduced forms of quality assurance in the 1980s-1990s, in response to national concerns. In Central and Eastern Europe, accreditation had been introduced to support the major transformation of higher education to the needs of a post-communist society. In other parts of Europe, massification and budget restrictions had necessitated new steering mechanisms for higher education, often including internal and external quality assurance but mostly without accreditation.

- Diversity was the axiom of European higher education policy. International standards of higher education and international compatibility were considerations mainly in small countries and in the countries going through post-communist transition.
- International networks of quality assessment agencies were emerging around the turn of the century (ENQA for the EU, CEEN in Central and Eastern Europe, INQAAHE worldwide), focusing on professionalization of the agencies first of all but with interest in international aspects of their quality judgements as well.

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

- The most common adaptation until 2005 was the introduction of accreditation (with a clear yes/no outcome) or similar procedures to increase international transparency on the status of qualifications. Participation of learners and international representatives is common now in many quality assurance systems.
- Further adaptations of quality assurance were spurred by the ESG: for external quality assessment agencies the requirement that they themselves be evaluated on a regular basis was new, while for higher education institutions the ESG called for internal quality assurance of areas that had not always been covered before. The most profound impact on quality assurance came, however, from the stipulation in the ECTS that was made even more explicit in the Qualifications Framework for the EHEA (QF-EHEA) that curricula should be designed from a student perspective, with learning outcomes and student workload as main pillars.

Assessment

- All countries but Bosnia-Herzegovina apply internal and external quality assurance on a system-wide scale.
    - This does not imply that all higher education institutions in these countries have functioning internal quality management. This is a major issue in Part 1 of the ESG and therefore will be evaluated through ESG-guided external reviews in future.
    - Applying compatible quality assurance systems does not guarantee the delivery of compatible quality of education. This must result from combined meaningful learning outcomes (ECTS) and qualifications frameworks (QF-EHEA and NQF).
- The European Standards and Guidelines (ESG) have been established (2005).
- The EQAR is established and operative (2008).
- ESG reviews of quality assessment agencies are in progress: ENQA reviewed 44 agencies, all judged positively; EQAR listed 17 agencies (as of late 2009).
- With continued attention to the use of all parts of the ESG in future, the formal elements of cooperation in quality assurance may be said to have been achieved. Attention should turn now to increasing compatibility of practices to ensure higher levels of confidence in the quality of higher education EHEA-wide.

Which actions, reforms and policies have proved to be successful?

- The adoption of the ESG is a significant achievement of international cooperation in the Bologna Process, especially in light of its connection since 2008 with the European Quality Assurance Register for Higher Education (EQAR), which is the first mechanism in Europe intended to identify bona fide quality assurance agencies operating within the EHEA, independent of their status (public or private) or origin (inside or outside the EHEA).

- By the end of 2009, 17 quality assessment agencies had successfully been evaluated for 'substantial compliance' with the ESG and were registered on the EQAR. Forty four quality assessment agencies were accepted as full members of ENQA also on the basis of substantial compliance with the ESG (these include all EQAR-registered agencies).

- Quality assurance systems, partly due to EHEA-level targets, now often include international reviewers in visiting teams and representation of students' views. Other stakeholders (e.g. professional organisations) remain less visible in visiting teams in most quality assurance systems.

Which actions, reforms and policies have proved to be less successful?

- Our case study of three countries showed that in quality assurance, as in degree reform, national histories and national agendas are strong drivers of the actual changes made. Measures for EHEA-wide compatibility have not yet led to the increase in trust needed to make 'stressless' international recognition of degrees a common practice. At the moment, the ESG reviews of quality assessment agencies vary so much in their actual processes that it would be unreasonable to expect them to result in an increase in international trust in the short-term, although until ESG and QF-EHEA have been implemented in more countries, we cannot make this a firm conclusion.

- Implementation of the new quality demands from the ESG and QF-EHEA at the level of study programmes in higher education institutions has only just started in many countries. Internal and external quality assurance systems designed in line with the ESG are found in 16 higher education systems.

- The quality assurance measures in the Bologna Process focus on the activities of the legislature and of (national, regional or specialised) quality assessment agencies. This tends to be a top-down approach, which within higher education institutions may lead to the reaction that these are externally-imposed requirements rather than instruments owned by academics and learners to develop a quality culture. Discipline-based initiatives such as the Tuning project are important complementary actions to engender more 'shop-floor' level involvement in the Bologna Process.

2.3 The assessment with regard to qualifications frameworks

Main goals stated

- An overarching framework of qualifications for the European Higher Education Area [QF-EHEA] (2003).

- Member States should elaborate a framework of comparable and compatible qualifications for their higher education systems (2003), by 2010 (deadline defined in 2005; deadline extended to 2012 in 2009).

What was different ten years ago, before the Bologna Process?

Qualifications frameworks in terms of learning outcomes and graduates' competences were hardly heard of in higher education. Ireland and UK-Scotland belonged to the forerunner countries in the world where qualification issues were discussed. Qualifications frameworks became an action line in the Bologna Process from 2003 onwards.

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

- Establishing the QF-EHEA is a major achievement. It carries promises to ease recognition and mobility, both within and across countries. The role of the QF-EHEA in promoting the global dimension was re-emphasised in the London communiqué (2007).
- Qualifications frameworks are at the crossroads between degree structures (including short degrees), quality assurance, recognition and the social dimension (flexible learning paths, recognition of prior learning).
- Parties concerned are satisfied that the QF-EHEA is in the main coordinated with the EQF-LLL of the EU. One country (Malta) self-certified its NQF against both in a single exercise, showing their compatibility in practice.

Assessment

- An overarching framework of qualifications for the European Higher Education Area [QF-EHEA] has been adopted (2005).
- Eight higher education systems have self-certified national qualification frameworks. The extension of the deadline shows that more effort is needed here.

Which actions, reforms and policies have proved to be successful or less successful?

- Implementation of national qualifications frameworks remains on the agenda of ministers; they now urge all countries to achieve implementation by 2012.
- How the arrival of the ESG and the QF-EHEA together with national qualifications frameworks will actually have impact on the quality of higher education being delivered to learners will depend on curriculum reform by higher education institutions, taking place within national qualifications frameworks.
    - Thoroughness of approach is more important than rushing to meet deadlines, yet maintaining speed of process is important because of the crucial place of qualifications frameworks in easing recognition and hence mobility.
    - Commitment of academics, curriculum and quality officers in higher education institutions is the main critical success factor.

  - Support and guidance from national and European levels remain important; the Coordination Group for qualifications frameworks, led by the Council of Europe, is a natural place for these tasks at the EHEA-level.

- Trust at the 'shop-floor' level in higher education institutions and in the rest of society that application of the QF-EHEA in national qualifications frameworks stands for a common European level of higher education is crucial for the smooth recognition of credits and degrees both within and among countries. Regulations can only create conditions for a high-trust situation, they cannot enforce it. Communication policies and subject-level approaches such as the Tuning project may play a role in this respect.

2.4 The assessment of recognition policies

Main goals stated

- Implementation of the Diploma Supplement as a tool to make degrees easily readable and comparable (1999).

- A system of credits should be established—such as in the ECTS—as a means to recognise learning (also lifelong learning) by the universities concerned (1999).

- The Lisbon Recognition Convention should be ratified by all countries participating in the Bologna Process and every learner should receive the Diploma Supplement automatically and free of charge (2005).

What was the situation ten years ago, before the Bologna Process?

- Many initiatives aimed at creating greater transparency in higher education surfaced in the past decades. Several of them emerged before the Bologna Declaration and were subsequently formally incorporated into the process. This applies inter alia to the LRC, ECTS and the DS. The Lisbon Recognition Convention emerged within the framework of the Council of Europe and UNESCO. The Diploma Supplement was developed jointly by the European Commission, Council of Europe and UNESCO. Other measures on recognition such as ECTS, ENICs and NARICs were developed in the EU, Council of Europe and UNESCO frameworks.

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

- The main legal framework for academic recognition is the Lisbon Recognition Convention. The LRC has now been ratified by all but two countries in the EHEA (Greece and Italy). In most countries, national legislation now complies with the Convention at least formally. Exceptions are Albania, Azerbaijan, Bosnia & Herzegovina, Moldova and Ukraine.

- The Diploma Supplement is now issued automatically and free of charge by most higher education institutions in 30 of the 46 countries. The formal adoption of the Diploma Supplement has thus progressed in the last ten years.

- The ECTS has now been adopted in 43 EHEA countries. Other EU measures relevant to recognition have not been adopted in the Bologna framework and therefore only have legal effect in the 27 EU countries (and sometimes in the EEA countries). Most important here are the directives related to the recognition of professional qualifications.

Assessment

- Introduction of ECTS: see section 2.1 on degree and curriculum reform.
- Of all Bologna countries, 2 have not yet signed or ratified the LRC, 5 have signed and ratified the LRC but their legislation is not in compliance with the LRC and 39 countries have signed and ratified the LRC and their legislation complies with the provisions of the LRC. Ratification and adaptation of legislation are to be completed in the remaining countries.
- The Diploma Supplement is issued automatically and free of charge in most higher education institutions in 30 out of 46 countries. This needs further attention in the other 16 countries and in the remaining higher education institutions in the 30 countries.

Which actions, reforms and policies have proved to be successful?

- The near EHEA-wide implementation of formal Bologna requirements such as the Lisbon Recognition Convention has been a major achievement. (Almost) achieving this has shifted the discussion to a more detailed level of realising the impacts intended by the measures.

Which actions, reforms and policies have proved to be less successful?

Some major remaining issues are associated with making instruments such as the Lisbon Recognition convention work in practice.

- There are different interpretations of the notion of 'substantial differences' and other terms and practices around recognition. While room for interpretation is necessary, this does create uncertainty and requires more attention.
- The use of learning outcomes as a determinant for recognition has an obvious role to play in making qualifications more transparent for learners, credential evaluators and employers. If qualifications are described in terms of learning outcomes the process of evaluation and recognition will be simplified and better informed thus allowing fairer judgments to be made. Furthermore, learning outcomes will help the systematic recording of information about qualifications in Diploma Supplements.
- The awareness of the existence and meaning of the Diploma Supplement among learners and employers still needs to be improved.
- The Bologna Ministers committed themselves to issuing the Diploma Supplement to all graduates automatically, free of charge and in a widely spoken European language by 2005. This goal has not yet been achieved fully in all Bologna countries.

2.5 The assessment of policies for flexibility and widened participation

Main goals stated

Widening of access

- Creation of more flexible learning pathways into and within higher education (2005), and to widen participation at all levels on the basis of equal opportunity (2007).
- Recognition of prior learning, including the recognition of non-formal and informal learning (2007).
- The student body entering, participating in and completing higher education at all levels should reflect the diversity of populations (2007). Widen participation at all levels (2007).
- Development of measurable targets for this area by each country (2009).

Improved conditions for completing studies

- Providing appropriate studying and living conditions for learners to overcome obstacles related to their social and economic background (2003).
- Helping learners, especially from socially disadvantaged groups, in financial and economic terms and providing them with guidance and counselling services with a view to widening access (2005).
- Flexible curricula (2007).
- Flexible learning, in the context of lifelong learning (2007).

Other

- Encourage equal participation in mobility programmes (2001, 2005).

What was the situation ten years ago, before the Bologna Process?

- Public good and social cohesion arguments had a place in higher education debates in different countries traditionally, with needs-based grant systems, available in a number of countries, as a clear example of policies in this direction. Although it had been mentioned before (Prague communiqué, 2001), the social dimension only became an explicit action area in the Bologna Process in 2005.
- The national level had—and still has—responsibility for developing and implementing policies to achieve participation goals, as well for assuring links with other action areas, for example, supporting the mobility of less-wealthy learners (e.g. through the portability of student support).

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

Since targeted social dimension actions started only recently in the Bologna Process, we cannot draw conclusions on the contribution of actions *within* the Bologna Process as yet. We can only give a short overview of the current situation.

- 39 out 48 systems report underrepresentation of certain groups in their student body. Most commonly underrepresented groups include people from lower socio-economic backgrounds (low income and low education parents), and people coming to higher education through non-traditional educational routes.

- While participating fairly proportionally overall, females are underrepresented in science and technology programmes in almost all countries, as well as in the second and third cycles of studies.

- In the majority of Bologna higher education systems, prior learning is recognised either as a basis for access or to offer exemptions in certain fields. Widespread use of RPL is found in two groups of countries:

  - Countries with nationally established RPL procedures to assess non-formal and informal prior learning as a basis for access, yet with varying degrees of application: Belgium, Denmark, France, Finland, Germany, Ireland, Luxemburg, the Netherlands, Norway, Portugal, Slovenia, Spain, Sweden and the United Kingdom (E/W/NI as well as Scotland). In these higher education systems, the proportion of learners accessing higher education through RPL reached up to circa 15% (United Kingdom–England, Wales and Northern Ireland).

  - Countries without nationally established procedures but with widespread application of RPL at the institutional level: Austria and Switzerland.

- Around one-third of the countries offer part-time studies, distance education, courses offered at non-traditional times (e.g. weekends, evenings) or other kinds of flexible learning modes. However, it is not possible to conclude that these modes of provision have been introduced with the aim of improved inclusion of underrepresented groups.

- Special guidance and counselling for learners is available in most higher education systems, with varying degrees of quality and availability. Most common is guidance and counselling in educational, psychological and career questions, and special guidance to support people with disabilities, offered either at national and/or institutional levels. In around one-third of the systems, such services are widespread and in another third services are available but at an insufficient level in terms of quality or availability.

- Regarding funding resources for social dimension purposes, a small number of countries in the north-west of the EHEA are characterised by high direct financial aid for learners (corrected for purchasing power parity), low student payments to higher education institutions and high percentages of GDP invested in higher education (Denmark, Finland, Sweden and UK-Scotland) while another set of countries in the south and east show low direct financial aid for learners, high student payments to higher education institutions and low percentages of GDP invested in higher education (Albania, Armenia, Azerbaijan, Bosnia & Herzegovina, Bulgaria, Croatia, Georgia and Serbia). The other 26 systems for which we have information do not differ very much from the combined average.

Assessment

Widening of access

- 16 systems have nationally established procedures to assess prior learning as a basis for access to higher education, 2 systems show widespread usage of RPL through institutional regulations. Other systems make limited use of RPL for accessing higher education, and in 8 systems there are neither nationally established procedures for RPL nor is it used in higher education institutions. The implementation of RPL is still very much in progress.
- Flexible learning paths involve many instruments, e.g. part-time studies, non-traditional teaching times (e.g. evenings, weekends), distance education, short cycle programmes, modularisation and elective courses.
    - Modules and electives were discussed in section 2.1 on degree and curriculum reform, as were short cycle programmes.
    - Part-time studies and studies at non-traditional times are provided in most or all institutions in 20, respectively 23, higher education systems.
- In 19 systems many higher education institutions offer distance education.
- Instruments for wider access need continued attention: provision of flexible study paths in order to widen access to and increase participation in higher education is not a widespread practice.
- In most of the higher education systems that we have data for, there are not yet signs of access actually being widened, or of increasing participation of disadvantaged groups. (Note: this goal was set clearly only in 2007, which makes its assessment difficult at this moment in time.)

Improved conditions for completing studies

- Student guidance and counselling services are widely available and of reasonable quality in 19 higher education systems. This goal deserves more attention.
- In 33 higher education systems, levels of financial aid for learners are very low, which also needs more attention.

Other

- Equal participation in mobility programmes: no data available.
- There were very few signs of the social dimension being seen as a priority area in most Bologna Process countries. This needs more attention.

Which actions, reforms and policies have proved to be successful?

- The case studies on increasing participation exemplify some widespread actions taken at the national level in high-performance countries, such as:
    - A clear and explicit identification of underrepresented groups and the development of tailor-made measures (i.e. educational programmes) targeted at these groups.

  - The provision of guidance and counselling to underrepresented groups at the pre-higher education levels of education.
  - The provision of sufficient financial support for learners.

- The case studies also showed that countries which have a relatively good representation of all social groups in higher education, or which have a good record of implementing methods to achieve this, have traditionally had such concerns on their policy agendas; successful social dimension policies appear to need long, sustained effort.
- Inclusion of the social dimension as an action line in the Bologna Process was stated by interviewees (national representatives in the Bologna Process) to be important for:
  - Raising awareness of participation issues in national policy making agendas.
  - Providing a platform to work on these issues at the Bologna level.
  - Providing opportunities for the participating systems to learn from each other.

Which actions, reforms and policies have proved to be less successful?

- Direct links between the implementation of the Bologna Process and widening access, increasing participation and ensuring completion of studies are not yet evident. For instance: some means that have implications for the social dimension (e.g. RPL, modularisation) are mainly identified with other action lines (e.g. change of degree structures). Furthermore, these goals became clear only in 2007. This situation also relates to the unsystematic development of the social dimension action line.
- The social dimension does not have a high priority in all national Bologna agendas. For instance, in the national reports for *Stocktaking 2009*, 12 systems left the social dimension section completely or mostly blank. On the other hand, 22 countries included a national action plan, indicating a certain degree of awareness and in many cases the existence of supporting policies.
- The definition of underrepresented groups varies across countries depending on national dynamics and conditions (e.g. some ethnic minorities are important in some countries but hardly present in others). As a result there are a wide variety of mechanisms associated with the social dimension at a national level and this makes the formulation of common policies within the Bologna Process difficult.
- Despite the key role of the national level in achieving social dimension goals, the introduction of common frames at the Bologna level to trigger action at the national levels is seen as important by many interviewees (national and international level representatives)
- Regular collection of extensive, sufficient and comparable data on the socio-economic conditions of learners is needed to develop better guidance strategies, to monitor progress and to raise awareness at the national level. The data currently available at the Bologna level is insufficient to guide such actions.

2.6 The assessment of mobility

Main goals stated

- Promotion of mobility by overcoming obstacles to the effective exercise of free movement (1999) of learners, teachers, researchers and administrative staff, emphasizing the social dimension of mobility (2001).
- Increasing the international competitiveness of the European systems of higher education. Ensure that the European higher education system acquires a world-wide degree of attraction (1999).
- Portability of national loans and grants (2003).
- Improve the availability of data on mobility (and the social dimension) across all the countries participating in the Bologna Process (2007).

What was the situation ten years ago, before the Bologna Process?

Mobility questions were seen in a national perspective, although through EU programmes such as Erasmus and Tempus some international stimuli had entered into the policy debate. The motivations for countries' interest in mobility questions varied and consisted of different mixes of educational, cultural and economic rationales. Student mobility figures in general rose in the 1980s and 1990s after the introduction of the main EU mobility programmes.

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

- The main change between 1999 and 2007 [3] has been the shift in focus from short-term credit mobility (by 'free movers' and learners moving within the framework of European, national or regional programmes) to degree mobility.
- In terms of degree mobility, developments already apparent before the Bologna process intensified, for instance the mobility of learners from outside of Europe to Europe. The east-to-west pattern of mobility was also apparent before 1999.
- All mobility flows before the Bologna Declaration involved much smaller numbers of learners than in 2007.

Attractiveness of the EHEA in terms of degree mobility

- Students' degree mobility has continued to increase since the Bologna Declaration. The EHEA has been particularly successful in attracting learners from outside the EHEA. The numbers of learners coming to the EHEA increased by 116% in absolute terms between 1999 and 2007 (compared to a global growth in foreign learners of 60%). In relative terms, the share of non-EHEA foreign learners in EHEA countries has grown by more than 60%, comprising 2.6% of the student population within the EHEA in 2007 (compared to 1.6% in 1999). The increased learner mobility towards the EHEA cannot be fully attributed to the Bologna process. Many countries have intensified their campaigns to recruit learners from outside Europe and developments after 1999 in other major destination countries like the United States (9/11/2001) or Australia may have contributed to the shift towards Europe.
- Many of these new foreign learners opted for the 'old' EU countries as their study destinations. Traditional destinations such as the UK, Germany and France have remained strong players. Countries where the numbers of foreign non-EHEA learners have decreased are mainly in the South-eastern part of the EHEA.

Internal degree mobility in the EHEA (full degrees abroad)

- Internal student mobility showed much more modest growth. In absolute numbers the growth is still quite impressive at 38%, but given growing student populations in most countries in relative terms this represents only a 4% growth: in 1999, 1.9% of the total number of EHEA learners were foreign learners from other EHEA countries, while in 2007 this was 2.0%.
- In these mobility movements a clear east-to-west pattern can be detected. The main receivers are in general small senders and vice versa. Most uneven in this respect is the UK, with almost 20% incoming foreign learners but with only 0.5% of its learners studying elsewhere in the EHEA. Fairly balanced mobility involving substantial learner numbers is only found in two countries—Ireland and Malta.

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[3] The latest relatively comparable data on student mobility are from 2007; this limits our possibilities to address changes that may have taken place in the last few years.

Internal credit mobility in the EHEA (a recognised part of a programme abroad)

- In terms of credit mobility there is a need for better data. Current national data sources are either not sufficient or methodologies and definitions are not compatible with other countries' sources. The two sources that are available, Erasmus statistics and Eurostudent surveys, are limited (Erasmus does not include free mobility figures; Eurostudent includes less than half the countries participating in the EHEA), but both indicate a slight growth in the number of credit-mobile learners in the EHEA.

- Erasmus statistics show an increase, although predominantly in outward mobility from Erasmus countries in Central and Eastern Europe. Participation in Erasmus is however smaller than 'free-moving' mobility.

- The data from the Eurostudent Survey (where 'free-movers' are included) shows promises for data improvement in the future, but from the current data points (2000, 2005, 2008) we cannot conclude that there is an upwards or downwards trend. There seems to be a mixed pattern, but these results are probably influenced by changes in methodologies and definitions over the reporting period.

Assessment

Promotion of student mobility within the EHEA

- EHEA-wide credit mobility: data of sufficient quality are not available.

- EHEA-wide diploma mobility: absolute rise of 39%, equalling a relative increase of 4%,[4] to the point where 2.0% of EHEA learners were pursuing a degree in another EHEA country.

- Distribution across countries of credit mobility: no comparable data available.

- Distribution across countries of diploma mobility: 29 countries witnessed a growth in foreign learners from other EHEA countries; 11 countries showed decreasing numbers. 6 countries did not have data of sufficient quality.

- There is an east-to-west imbalance in student mobility. This imbalance needs attention for student mobility to remain sustainable.

World-wide attractiveness

- The EHEA had less than 25% of the world's foreign learners in 1999 and its share increased to over 30% by 2007. The EHEA's attractiveness is increasing. The goal is apparently being achieved but needs continued attention to ensure satisfactory progress and better balance across the EHEA countries (see also next point).

- Twenty-five countries witnessed a growth in foreign learners from outside the EHEA countries; 15 countries showed decreasing numbers. 6 countries did not have data of sufficient quality.

- Portability of grants and/or loans is possible in 38 out of 46 countries and, although it is spreading, needs further attention.

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[4] Relative increase takes the growth of the student population into account.

- Availability of data on mobility: Data on diploma mobility has shown considerable improvement. Data on credit mobility has shown some improvement but not for all countries of the EHEA. Data on staff mobility (teachers, researchers, administrative staff) remains very poor. This needs further attention.

2.7 Conclusions and assessment of the global dimension

As an action line, the global dimension started to emerge in 2005 and took off in 2007, in a spirit of 'both competitiveness and cooperation'. After the ministerial meeting of 2009, the first global Bologna Policy Forum took place, focusing future attention amongst other things on worldwide recognition of degrees and on fair and fruitful 'brain circulation'. Mobility figures apart, it is too early to give an assessment like in the other action areas of this report, so we remain more descriptive here.

The global dimension has two main facets in the Bologna Process. One is the attractiveness of European higher education for the rest of the world as indicated in worldwide student mobility. We showed earlier that incoming mobility from outside the EHEA is growing faster than international mobility worldwide; Europe's higher education is indeed becoming more attractive. This result is mainly associated with the cumulative effect of national policies as until 2007, our final year of mobility data, there were hardly any specific actions in the Bologna Process directed at the global dimension. This is now changing and decisive actions to improve supportive policies to facilitate student and staff mobility (visas, social security coverage, work permits, pensions) are among the EHEA countries' commitments for 2010 and beyond.

Another facet of the global dimension may be an unexpected side effect: the Bologna Process has become an inspiration for the development of higher education cooperation policies all around the world. This side effect triggered the development of global policy forums.

An international expert panel identified elements that have been adapted or adopted across the world regions that they hailed from (Africa, Arabia, Australia, East Asia, Latin America and North America):

- In the USA, interest in the Bologna Process concerns mostly student mobility from Europe to US postgraduate studies (three-year bachelors are now more often recognised than before) and the Tuning project, which has inspired 'Tuning USA'. From the focus on Tuning one can conclude that there seems to be some hesitation in the USA to use 'abstract' instruments such as QF-EHEA, while approaches such as Tuning give a central role to academics and the professions.

- In China, student mobility to Europe and research cooperation form the core of interest, but the government is also looking at the Bologna Process including degree structures in its development of a strategic plan for higher education until 2020.

- In Latin America, Tuning also was the main element of interest, in the form of an international project among specialists from eight Latin American and seven European universities; the project was however not followed up.

- The Asian-Pacific Brisbane communiqué (2006), like the Bologna Process, was a sustained process at least until 2008, covering 52 countries, with a cooperation structure to support follow-up actions.
- Other recent initiatives for regional integration of higher education are evident in several world regions, e.g. Southern Africa, the Gulf Cooperation Council, Eastern Asia (Japan – Korea – China) and South Asia.
- The effects of the Bologna Process include increased cooperation between higher education institutions from EHEA countries with counterparts abroad; this is mentioned in the USA, Latin America and Asia.

More critical points about the Bologna Process from other countries' perspectives included:

- Learners do not seem to take a country's membership of the EHEA into consideration when choosing a destination for international mobility; they look at individual countries and institutions. Equally the EHEA is not seen as an area providing a uniform level of higher education degrees.
- The USA remains the most prestigious destination, attracting the top tier of learners (e.g. from China).
- Further information provision remains necessary to give a complete picture of the coherence of the reforms in the Bologna Process to stakeholders in other parts of the world.

2.8 The assessment of 'across-the-board high performance' cases

A detailed assessment of these high performance cases is seriously limited by the characteristics of the Bologna Process as a dynamic, international process and by the complexity and ambiguity of the relationships between means, goals and ends in the different countries. Furthermore there are limitations to the information available on core indicators. The choice of cases was made in coordination with the European Commission and our study's Advisory Board; the main target was to select cases that could provide good practices for others to use as benchmarks either as 'high achievers' (Ireland, the Netherlands) or as countries that showed high levels of activity compared with others in similar circumstances (among the original signatories: Norway). A secondary argument was the spread of cases across the EHEA; we included countries that showed high levels of activity compared with other 'late-joiners' (Georgia, Serbia, Turkey).

What was the situation ten years ago, before the Bologna Process?

- The general contexts for reform in the six countries were defined individually and were quite diverse. Among the cases were post-socialist countries coping with challenges of political-economic change as well as politically and economically relatively stable Western European countries.
- More specifically, focusing on higher education policy a wide variety of steering approaches, policy agendas, policy styles and policy instruments was found.

- Most importantly, the systems had to deal with quite different challenges in their higher education systems, ranging from inefficiencies of all sorts, e.g. high drop-out rates (Serbia), corruption (Georgia), low participation rates across a variety of dimensions, the need for a robust quality assurance system (Ireland), to limited flexibility in the system (the Netherlands), and maintaining and upgrading quality in a rapidly expanding higher education system (Turkey). Consequently, systems had to deal with very different key challenges.

- Despite this variety, the common denominator was that most national policies in higher education targeted domestic issues. In most cases, specific issues were dealt with in a relatively short timeframe (apart from legislative changes), and not as a decade-long reform.

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

- The Bologna Process has created a common focus in domestic higher education policies. In all six higher education systems we see a general sense of urgency for reform, with the initial concrete ideas for reform being in line or at least compatible with the Bologna action lines.

- The need to tackle domestic issues and the pressure to live up to Bologna objectives proved to be an important stimulus for reform.

- The urgency with which reforms were pursued does not imply that all stakeholders happily agreed with the policies and solutions suggested (note also the current protests against higher education policies—Bologna-related or not—in a number of EHEA countries). Noteworthy are concerns from learners and academic staff.

- The Bologna Process was seen as a lever, key driver or as 'just' one of the factors pushing for reform. The implementation of national reforms in practice therefore often implied deviations from Bologna intentions. The Bologna Process has also changed its objectives over time, as have domestic higher education policies.

- This trend of divergence has been strengthened by the fact that elements of the Bologna reform agenda were interpreted differently by different countries and by key domestic higher education stakeholders.

- Related to this, all cases, despite being examples of overall high performance, struggled with the implementation of at least one of the Bologna elements: there is no case of high performance across all indicators/elements. In this respect, we can speak of uneven implementation of the objectives.

- In most countries, the structural elements are in place (three-cycle systems, DS, ECTS), but softer elements (European dimension, social dimension) are less developed.

- Moreover, even regarding the structural elements we see considerable diversity (the way systems deal with ECTS and the Diploma Supplement, etc.). Diversity is not at odds with the international and open character of the Bologna Process, yet can make compatibility across the EHEA difficult (for example, in practice the length of cycles is still measured in terms of years of study rather than by assessing achieved learning outcomes).

- Taking these elements together, we conclude that much reform has taken place, but at different speeds, with different policy emphases, and with different and changing policies and policy instruments across the six cases.

Which actions, reforms and policies have proved to be successful?

- The involvement of stakeholders in various stages of the policy process has had a positive impact on goal achievement. This is particularly evident in the countries where stakeholders were involved in exploring problems and solutions and in setting directions for strategies and policies.
- Strong links between national policy entrepreneurs and bodies and the diverse European-level actors have had a positive impact on implementation (this is particularly noteworthy in the case of quality assurance).
- Cases where higher education systems were already in line with a number of elements of the Bologna 'model' struggled less than the others to reach Bologna objectives. They were able to focus more swiftly on in-depth implementation issues.
- Supporting policy mechanisms (funding, regulation, policies in other areas, communication and information exchange)—and a balanced mixture of these mechanisms—are crucial to the successful implementation of Bologna reforms.
- Policy monitoring is an effective instrument to foster goal achievement, allowing for a reflection on policy aims and—if needed— the adjustment of policies.

Which actions, reforms and policies have proved to be less successful?

- The operation of the intergovernmental process (*Stocktaking* and its underlying national reports) has emphasised policy initiatives and plans. The crucial question of the outcomes of the process in terms of its key objectives (employability, compatibility, comparability) has not been addressed by this process (and perhaps could not have been).
- Even in high-performing countries, not all of the objectives have been addressed. In particular, the social dimension has been neglected in terms of concrete policies and actions. This hints at the ambitious nature of the Bologna Process in wishing to achieve many reforms in a relatively limited amount of time; spreading attention thinly across a wide portfolio of complex and interrelated policy issues did not characterise the policy process in high-performing countries.
- In addition, in all cases we noted particular political/cultural issues at stake that complicated the realisation of some of the elements of the Bologna Process (e.g. lack of experience with a quality culture).
- Not all countries, but certainly countries relatively new to the Bologna Process, mentioned a lack of resources and expertise to guide and influence the domestic policy process and subsequent implementation as significant constraining factors.

2.9 Assessment of the management of the Bologna Process

Main goals stated

The follow-up structure should:

- Organize 'constant support, supervision and adaptation to the continuously evolving needs' (1999).
- Pursue the ways of 'intergovernmental cooperation' in collaboration with stakeholder organizations, especially higher education institutions and learners, as partners (1999).

To make this more explicit, we interpreted adequate management of the process as:

- The division of tasks between Bologna Follow-Up Group (BFUG), BFUG Board and the Bologna Secretariat should be clearly defined, avoiding duplication of tasks.
- Work should be transparent and open to individual country initiatives.
- The process should be well coordinated ensuring a good internal and external flow of information about developments.
- The process should be supported administratively by a politically independent Bologna Secretariat.

What was different ten years ago, before Bologna?

- Higher education in Europe was a policy field considered to belong almost exclusively to national policy making. Interviews confirm that it was rare that individual ministry representatives communicated and learned from each other, and if it happened, this was in e.g. the Council of Europe setting or as a part of European Union ministerial meetings.
- Barriers for more convergence and communication between higher education authorities in Europe were structurally very different higher education systems and regulation practices, and we noted the non-existence of a 'common higher education language'.
- Some initiatives to stimulate mobility of students had already been initiated e.g. creation of the Erasmus mobility programme and instruments like ECTS and the Lisbon Recognition Convention.
- Broader cooperation between higher education authorities in different European countries was mainly limited to regional cooperation e.g. Nordic or Baltic countries.
- Representation of universities, labour unions and student unions at the European level existed in less formalized structures and with more limited mandates. European universities were represented through two organizations, the Association of European Universities (CRE) and the Confederation of European Union Rectors' Conferences. Student unions were represented by the ESIB, but that organization was much smaller than ESU now is, and cooperated with other stakeholders and authorities only in much more informal ways.

The following statements all are paraphrases from our interviews. Some of these mirror conclusions reached in other chapters through other methods.

What progress has been made over the past decade in terms of the objectives of the Bologna Process?

- A common higher education language and functional structures have been created, which promote communication between countries about higher education.
- The Bologna Process structure is unique because it is pan-European, inter-governmental, and includes stakeholder organizations as consultative partners. This structure is characterized in interviews as very different and more effective when compared with structures in the European Union.
- Work within the BFUG is characterized by informality in the plenary BFUG and its subgroups. Openness of the process towards individual country initiatives is usually praised as a major strength of the process.
- Bilateral communication between individual ministries responsible for higher education increased. The current Bologna structures are described as a good platform for information exchange and networking.
- Stakeholder organizations (representatives of higher education institutions, learners, employers and employees) are consulted much more in decision-making on higher education at the European level and within many national contexts.

Assessment

- The existing Bologna Follow Up structure is intergovernmental and involves stakeholder representatives adequately.
- It is characterised as open to individual country initiatives and in general has proved capable of supporting and supervising the process adequately.
- The extent of adaptation to continuously evolving needs is not as satisfactory and the current structure, although effective for the purposes of consensus seeking and political negotiation over changing process goals, is not able to answer properly to the challenges of the implementation phases of the process. The goals and desired outcomes are not defined precisely, and in some cases are not well communicated nationally, which leads to different implementation across Europe.
- The BFUG and its Board are not equally used by all Bologna Process members. The discussions are said to be often dominated by representatives of a small number of countries and by some consultative members. There is no clear division of work between the BFUG and its Board. The Board functions to some extent as a small BFUG rather than preparing BFUG meetings, as it discusses documents that have to be discussed again at BFUG meetings, which is the only group with decision-making power.
- In a number of countries the communication of discussions and political actions between BFUG and national higher education actors in charge of policy and implementation is intermittent or non-existing. The lack of continuity among persons representing countries on the BFUG is the most frequently mentioned reason for this.

- The Bologna Follow-Up Group's Secretariat has sometimes been criticized for being under the political influence of the hosting countries especially in the process of drafting the communiqué of the ministerial meeting.

Which actions, reforms and policies have proved to be successful?

- The Bologna Follow Up Group has established itself as a good platform for preparing strategic decisions about higher education in the European Higher Education Area.
- The level of political commitment towards the Bologna process goals has remained stable and high over the past 10 years.
- The involvement of stakeholders at the European level has proved crucial for the dissemination of information about the Bologna Process at the national level as well.
- As a result of the financial support of the European Commission, much of the work of Bologna follow-up structures has been made possible. Even more important is the financial support for the concrete implementation of many Bologna process means e.g. student mobility, ECTS implementation, qualification frameworks, and the Tuning project. The support for ECTS coordinators and counsellors and later for Bologna promoters (later called Bologna experts) contributed to the dissemination of good practices.
- The establishment of the Bologna Secretariat located in the host country of the next ministerial meeting helped the administration of the process at the European level and contributed to the continuity of the discussions.

Which actions, reforms and policies have proved to be less successful?

- The existing Bologna Process structures (BFUG and its Board) are not equally used by all Bologna Process members. The discussions are said to be often dominated by representatives of a small number of countries and by some consultative members.
- There is no clear division of work between BFUG and BFUG Board. The Board functions partly as basically a smaller BFUG, discussing documents that have to be discussed again at BFUG meetings, which is the only group with decision-making power.
- The work of the BFUG tends to be increasingly bureaucratized and overburdened by reporting and administrative preparation of the next ministerial summit. This takes away time and energy needed for policy discussions on e.g. more precise definition of the goals of the Bologna Process needed in the implementation process.
- In many countries the transfer back and forth of discussions and political actions between BFUG and national higher education actors in charge of policy and implementation is intermittent or non-existing. Lack of continuity of country representation in the BFUG is the reason most frequently mentioned in interviews. Some interviewees wondered if frequent changes of persons reflected lower levels of countries' political interest and commitment.

- Accepting new countries into the Bologna Process was not followed by effective support mechanisms to help the implementation of Bologna action lines in these 'new' countries.

- Sanctions (e.g. losing membership of the Bologna Process) for non-participation and non-implementation are unthinkable, yet participants would want to be able to ensure active participation and implementation in all countries.

- The management of the process lacks precisely defined goals, which is an obstacle for coherent implementation in different countries. This needs balancing with focusing on ultimate aims rather than on mechanistic implementation of means. However, very broadly defined goals do not allow for the proper monitoring of the process.

- The Bologna Follow-Up Group Secretariat is sometimes criticized for being under the political influence of the hosting countries, especially in the process of drafting the communiqué of the ministerial meeting.

- The imperative of belonging to the European Higher Education Area was used in many countries to advocate other reforms, which are part of the national reform agendas but are not mentioned in the Bologna Process documents. The result is that in a number of countries almost all higher education reforms including reforms of governance and funding are communicated nationally as belonging to the Bologna Process. The criticisms towards Bologna Process visible through student protests and the critical voices of some academics often target reforms not mentioned in official Bologna Process documents.

3 Overall conclusions

3.1 General observations

Beyond and across the different action areas, some general observations can be made concerning the achievement of the goals of the Bologna Process in its first decade.

- Higher education across the EHEA countries looks substantially different from ten years ago—perhaps with the exception of the social dimension. Degree structures and curricula have been reformed, other policies and instruments have been much more widely applied (LRC, ECTS, DS, quality assurance, qualifications frameworks, etc.) and all of this has contributed to making European higher education more attractive in the world.

- The discourse about higher education within the EHEA has changed from an almost exclusively national affair with some international influences to one where national policy is systematically considered within a Europe-wide framework, with the exception of very few countries.

- Higher education has gained a much more significant position on the overall national and European political agendas as a result of the Bologna Process.

- Most Bologna Process member countries have adopted new higher education legislation to introduce and regulate elements of the Bologna process. Many countries have allocated additional funds for the implementation of new Bologna policies.

- There is a large difference in the speed of implementation between individual countries. While some countries have shown considerable progress in implementing almost all action areas, other countries have still to start on some. This creates a European Higher Education Area of different speeds of implementation and varying levels of commitment.

- The extent to which the key objectives of compatibility, comparability and attractiveness (desired outcomes of the Bologna Process) will be achieved is still partly an open question. First, it is too early to answer the question across all participating countries because achieving some of the desired outcomes will require many years of post-implementation experience (especially labour market effects and those involving all three cycles). Second, even among countries that were on the whole high achievement cases, compatibility and comparability have not yet been fully achieved.

- From a learner perspective a similar conclusion applies to inter-cycle mobility. In all EHEA countries learners now have the option to continue second or third cycle studies in other EHEA countries, given the principle of the recognition of first cycle degrees. Yet establishing a fully transparent higher education area requires further efforts in the areas of recognition and student support. Student mobility within the EHEA has not increased substantially.

- Mobility towards the EHEA has increased substantially.

- Increasing staff mobility both within and outside the EHEA also needs further implementation of supporting policies, especially those regarding social security, pension funds and work permits.

- The operation of the intergovernmental process (stocktaking, national reports) has emphasised policy initiatives and plans. The crucial question about the outcomes of the process in terms of its key objectives (compatibility, comparability, competitiveness) has not been addressed to the same extent.

- Monitoring achievements nationally as well as for the EHEA as a whole needs better data. The focus should be on sound and comparable indicators that give insight into goal achievement.

3.2 Summary assessment

Strategic goal: Establishing the European Higher Education Area

- Most 'architectural' elements of the EHEA, i.e. those involving legislation and national regulation, have been implemented. Goals in need of further attention have been identified above.

  - Countries that joined the Bologna Process later, as a general rule have not yet fully caught up with the extent of implementation achieved in many, though not all, countries that joined from the beginning.

  - No country is perfect: even 'high-achieving' countries that joined from the beginning need to give further attention to some action areas.

- The impact of established architecture on substantive goal achievement at the level of higher education institutions and study programmes is far from having been achieved; however, this is not easily shown in a formal assessment of goal achievement at the level of the EHEA and countries.

  - Greater involvement of staff within higher education institutions and other non-state actors may be a key factor for successful implementation of many Bologna action areas in the practice of education.

  - The perceived gap in the provided quality of education between countries needs to be reduced to achieve a coherent higher education system in the EHEA.

  - Attention in the second decade of the Bologna Process needs to turn to the achievement of the substantive, strategic goals more than to further refinement of the architecture.

- Data on key outcomes such as widened participation and mobility need serious improvement to enable better assessment.

Strategic goal: Promote the European system of higher education world-wide

- The growing 'market share' of the EHEA in worldwide student mobility proves that European higher education has become more attractive since the Bologna Declaration.

  - The growth of mobility is concentrated in some Western European countries. Overall, then, the goal has been reached, but the geographical imbalance may require further attention.
  - International observers and students do not perceive the EHEA as an area providing a uniform level of higher education degrees.

- Cooperation between higher education institutions from EHEA countries and counterparts abroad has increased.
- The Bologna Process has become a major focus of attention for regional and sometimes also national higher education policy-making around the world (e.g. in China and in the USA).
- Further information provision remains necessary to give a complete picture of the coherence of the reforms in the Bologna Process to stakeholders in other parts of the world.

3.3 Key challenges for the next years

Maintain political momentum in the Bologna Process

A challenge for the Bologna Process is to keep up the political momentum and the interest of political leadership in the reform processes. This is needed to minimise the risk of the process becoming a bureaucratic process with little impact on the reality of higher education.

We have noticed a tendency to place highly relevant but broad and complex issues on the Bologna Process agenda, in particular the social dimension. Addressing such broad questions requires a patient and realistic approach to implementation, including concrete action lines which can be successfully monitored from the point of view of goal achievement.

Different degrees and speeds of implementation

There are different speeds in the implementation of the Bologna Process action areas across the 46 countries. This has to do with varying national agendas, with when different countries joined the Bologna Process, with differences in the distribution of authority nationally as well as with different experiences and traditions regarding higher education policy making. Yet an additional contributing factor to the differing implementation patterns across different countries is a lack of financial resources in many newcomer countries to the Bologna Process, given that most of the international financial support for the introduction of Bologna-related reforms comes from European Commission programmes, to which some newcomers have limited access (mostly only through the Tempus programme). This difference is most visible in student mobility. There is a need for more systemic assistance and support for these countries. Until now, support has been provided by the Council of Europe and some individual countries, but more organised action by the BFUG and more bilateral action and cooperation between different ministries should be encouraged.

Making reforms a reality: Qualifications frameworks and the involvement of teachers and students

Now that most of the architecture of the EHEA is in place, the crucial step is to make this structure into a reality that is 'lived and loved' by teachers and learners, for this is the level where the EHEA is being created. Regulations and policies can only create the conditions for the actual process of teaching and learning, and the current wave of resistance and protests (even if much of this is directed at issues that are not inherently part of the Bologna Process) shows that the EHEA is not yet sufficiently accepted by learners and teachers as a positive, interesting and challenging project. The strategic idea of creating compatibility of higher education outcomes across Europe appears to be experienced as rules that make higher education more hemmed in by regulations, 'school-like' and with less room for short-term (credit) mobility.

The capstone of the architecture and the bridge to focusing on the compatibility of the outcomes of education should be the national qualifications frameworks (NQF). Their implementation in higher education institutions should make the common goals of the EHEA clearer to teachers and learners, showing a positive gain for teaching and learning. The NQFs are now on the 'critical path' of the implementation of the EHEA and their completion by 2012 is necessary to make the EHEA a positive reality by 2020. The 2012 deadline is important, because if it takes on average some three years (until 2015) to adapt curricula to an NQF—some programmes will be due for renewal earlier, others later—, then the first major cohort of learners of the renewed programmes will graduate from the first cycle after three years (2018) and from the second cycle one to two years later (2019–2020). 2020 will then be the year when the EHEA's content as well as its architecture becomes a reality.