



PRESS BRIEFING

The European Higher Education Area in 2012:

Bologna Process Implementation Report



European
Commission



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CONTEXT

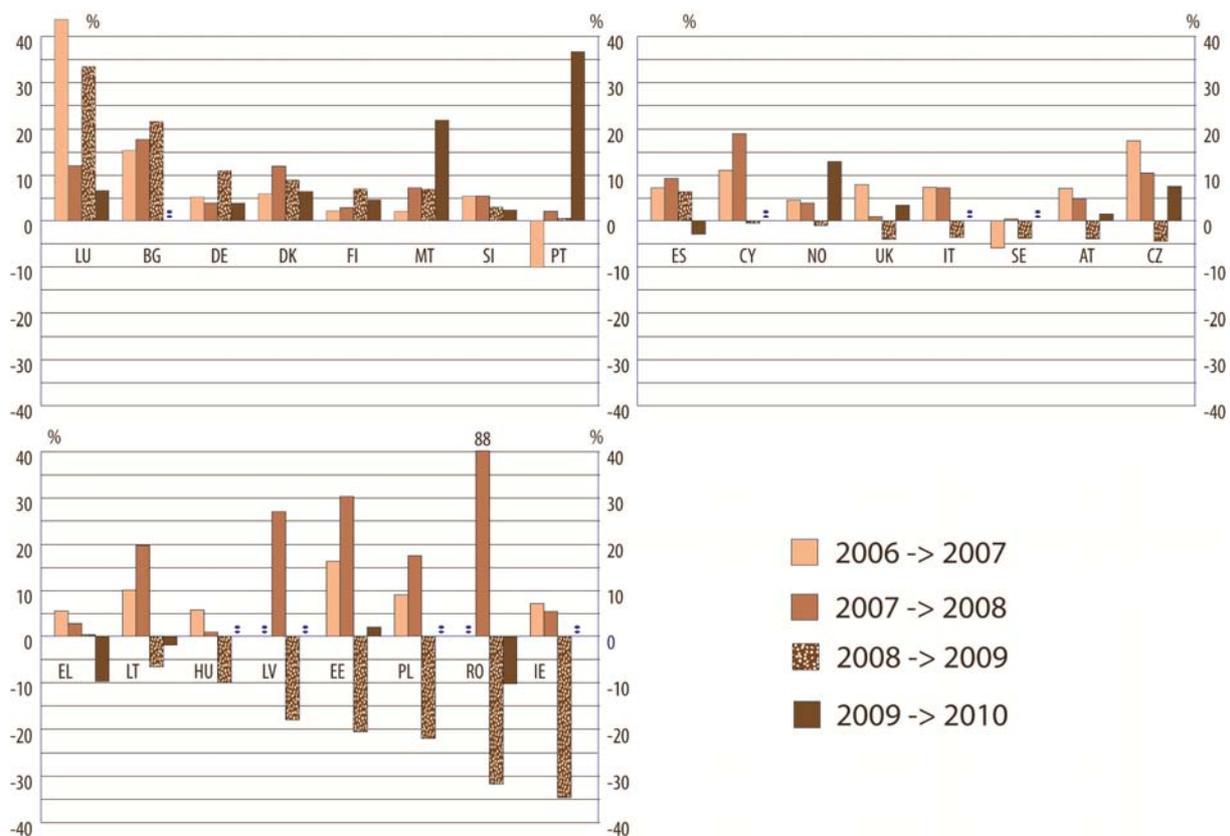
The Bologna Process Implementation Report is the result of a joint effort by Eurostat, Eurostudent and Eurydice and has been overseen by the Bologna Follow-Up Group. It describes the state of implementation of the Bologna Process in 2012 from various perspectives using data collected in 2011. Thus the report provides statistical data as well as contextualized, qualitative information.

The higher education landscape in 2012 has been transformed by the Bologna Process. All countries have made significant changes that have enabled the European Higher Education Area to emerge, and which have laid the ground for higher education that is serving an increasing range of societal demands. Higher education structures have been changed, quality assurance systems developed, mechanisms to facilitate mobility established, and a range of issues for the social dimension of higher education identified. The scale of a project that, on the basis of voluntary cooperation, agrees and implements common objectives for the higher education systems of 47 countries is unprecedented.

The Bologna Process continues to evolve through turbulent times, and in recent years the challenges for higher education have intensified. EHEA countries implement reforms in very different contexts. Student numbers vary enormously. Russia alone takes up more than 25 % of the student population of the whole EHEA, while students in Russia, Turkey, Ukraine, Germany, and the United Kingdom comprise more than 50 % of the total EHEA student population. In addition, while demographic changes are of concern to most countries, some face relatively big increases in the student population in the coming years, while other countries will experience a decline in numbers. This context needs to be taken into account when assessing the degree of progress that has been made in implementing reforms in different parts of the European Higher Education Area.

Differences also exist regarding the funding of higher education institutions. While in some countries all higher education institutions are funded primarily from public sources, in others there is a larger proportion of private institutions. In addition, levels of public expenditure vary greatly within the EHEA. Responses to the recent economic crisis also differ. While public expenditure increased considerably in some countries after 2008, there have been significant budget cuts in others. Overall, the result of the crisis so far is a decline in public expenditure on higher education.

Figure 1.10: Yearly changes in the public expenditure on tertiary education between 2006 and 2010



	LU	BG	DE	DK	FI	MT	SI	PT	ES	CY	NO	UK
2006-2007	43.7	15.4	5.3	5.8	2.3	2.2	5.5	-10.1	7.3	11.1	4.6	7.6
2007-2008	12.1	17.8	4.1	12.1	3.0	7.3	5.5	2.2	9.3	19.0	4.3	0.8
2008-2009	33.5	21.7	11.0	9.4	7.1	7.0	3.1	0.5	6.4	-0.5	-0.9	-3.5
2009-2010	6.7	:	3.7	6.5	4.7	22.0	2.5	36.7	-2.9	:	12.7	3.5
	IT	SE	AT	CZ	EL	LT	HU	LV	EE	PL	RO	IE
2006-2007	7.4	-5.9	7.2	17.5	5.6	10.1	5.8	:	16.4	9.1	:	7.2
2007-2008	7.3	0.4	4.8	10.5	2.9	19.8	1.0	27.1	30.3	17.6	88.3	5.5
2008-2009	-3.6	-3.8	-3.9	-4.4	0.3	-6.6	-10.0	-18.5	-20.6	-22.0	-31.7	-34.6
2009-2010	:	:	1.6	7.6	-9.7	-1.9	:	:	2.1	:	-10.2	:

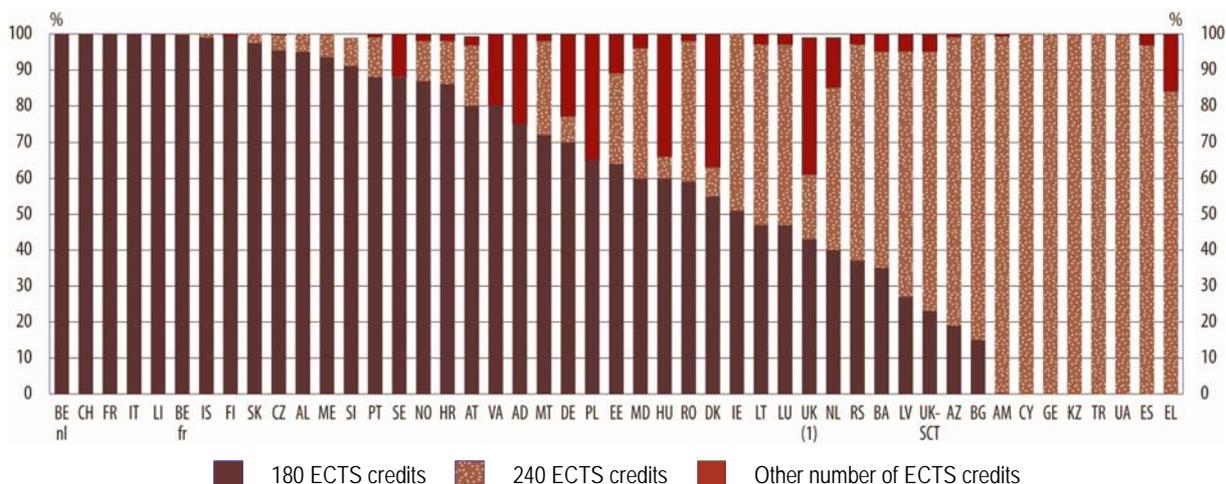
Notes: Within each group, data are sorted by the degree of change between 2008 and 2009.

Source: Eurostat (national accounts, government finance statistics, COFOG).

DEGREES AND QUALIFICATIONS

The commitment to adopt easily readable and comparable degrees and to establish a two cycle system are mentioned as the two first action lines in the 1999 Bologna Declaration originally signed by 29 countries and now being implemented in the 47 countries constituting the European Higher Education Area. But how successful has implementation been?

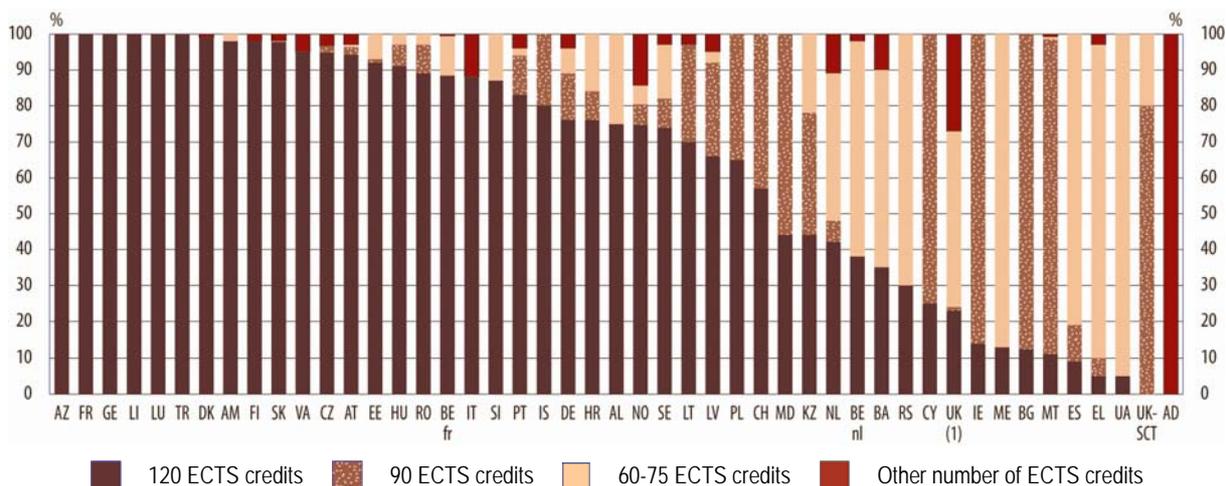
Share of first cycle-programmes having workload 180 ECTS credits, 240 ECTS credits or other number of credits, 2010/11



Source: BFUG questionnaire.

UK (1) = UK-ENG/WLS/NIR

Share of second-cycle (master) programmes with a workload of 60-75, 90, 120 or another number of ECTS credits, 2010/11



Source: BFUG questionnaire.

UK (1) = UK-ENG/WLS/NIR

There is no doubt that changes have taken place across the continent, and that today's European higher education landscape has been transformed by the Bologna Process. In just over half of the countries, the share of students studying in programmes corresponding to the Bologna two-cycle system is more than 90 %, and between 70-89 % in another quarter of the countries. At the same time, nearly all countries still have integrated long programmes in those fields which prepare for regulated professions and for which the EU directive 2005/36/EC and/or national legislation requires

5-6 years of studies: medicine, dentistry, pharmacy, architecture and veterinary medicine and to a lesser extent engineering, law, theology, psychology and teacher training.

There is no single model of either first or second cycle programmes in the EHEA: in the first cycle, most countries have a combination of 180 ECTS and 240 ECTS and/or another duration. In the second cycle, the most common model is 120 ECTS. The 180+120 ECTS credits (“3+2”) model is therefore the most widespread, but a number of other combinations can be found.

Changes to degree structures have been made to serve wider societal and educational goals, relating to the broad purposes and quality of higher education. In this context, the report shows significant differences in the share of first cycle degree holders that actually continue their studies in the second cycle. In some countries, the high levels of direct progression between the first and second cycle could be an indication that the first cycle may not yet have been developed as a qualification giving access to the labour market.

A number of common instruments have been developed within the Bologna Process to help in the process of transformation towards more student-centred systems. These include ECTS, Diploma Supplement and National Qualifications Frameworks. While the use of these instruments continues to grow and develop, usage is not always systematic, and a number of shortcomings remain. To be successful, these tools all require the delivery of higher education to move towards a learning outcomes orientation, focusing on what the student is expected to know, understand and be able to do. This contrasts with the more traditional input-oriented approach to higher education focusing on the transmission of defined curriculum content. The shift towards a learning outcomes approach, however, is a major cultural transformation that is taking time to become firmly established. There is a strong need for focused attention on this issue in the future.

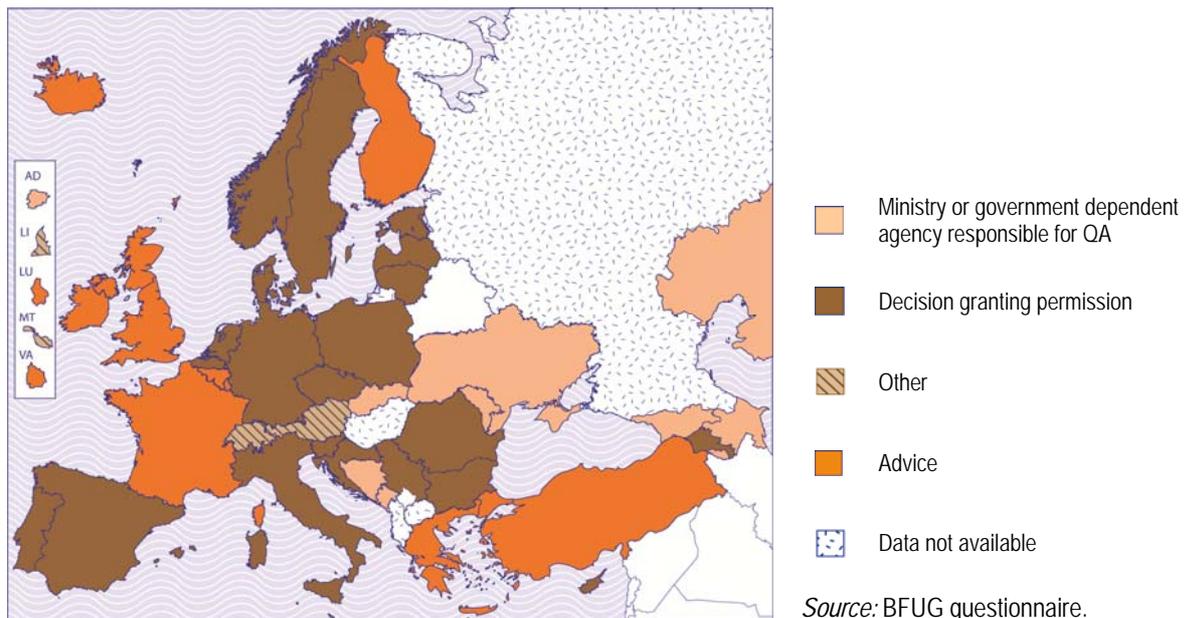
This report also finds continuing problems regarding recognition of qualifications. The problems are no longer about the legal framework for recognition, as national ratification of the Lisbon Recognition Convention is now almost universal, and countries are amending national legislation in accordance with its main principles. However, in the vast majority of countries (30) it is higher education institutions that take decisions on recognition of foreign qualifications for the purpose of further studies. Those staff within the institutions who are actually taking these decisions may not always have sufficient knowledge of the overarching legal framework, and in some cases insufficient experience in assessing foreign qualifications or credits. Thus, ensuring that the principles of the Lisbon Recognition Convention are properly implemented in institutional practice remains a significant challenge.

QUALITY ASSURANCE

Since the Bologna Process was launched in 1999, there has been a rapid transformation of external quality assurance in Europe. The development of the European Higher Education Area can certainly be seen as a catalyst to this process with quality assurance clearly linked to establishing stakeholder confidence. When the European Standards and Guidelines (ESG) for quality assurance were adopted in 2005, this gave a boost to European cooperation in the domain. The European Quality Assurance Register for Higher Education (EQAR) was established three years later, and by January 2012, 28 agencies in 13 countries were listed on the Register.

Although practically all EHEA countries have established some form of external quality assurance system, there are significant differences in purpose and approach. The majority of systems across the EHEA are primarily supervisory in character. Indeed 21 systems have established agencies with decision-making powers – including countries where the agency makes a proposal for decision and the government is responsible for the actual decision. 11 systems have agencies that are advisory and more enhancement-oriented in character. Four countries (Austria, Liechtenstein, Malta and Switzerland) point to a mixed situation, with different agencies having different orientations (see Figure 3.1).

Main outcome of external evaluation by QA agency, 2010/11



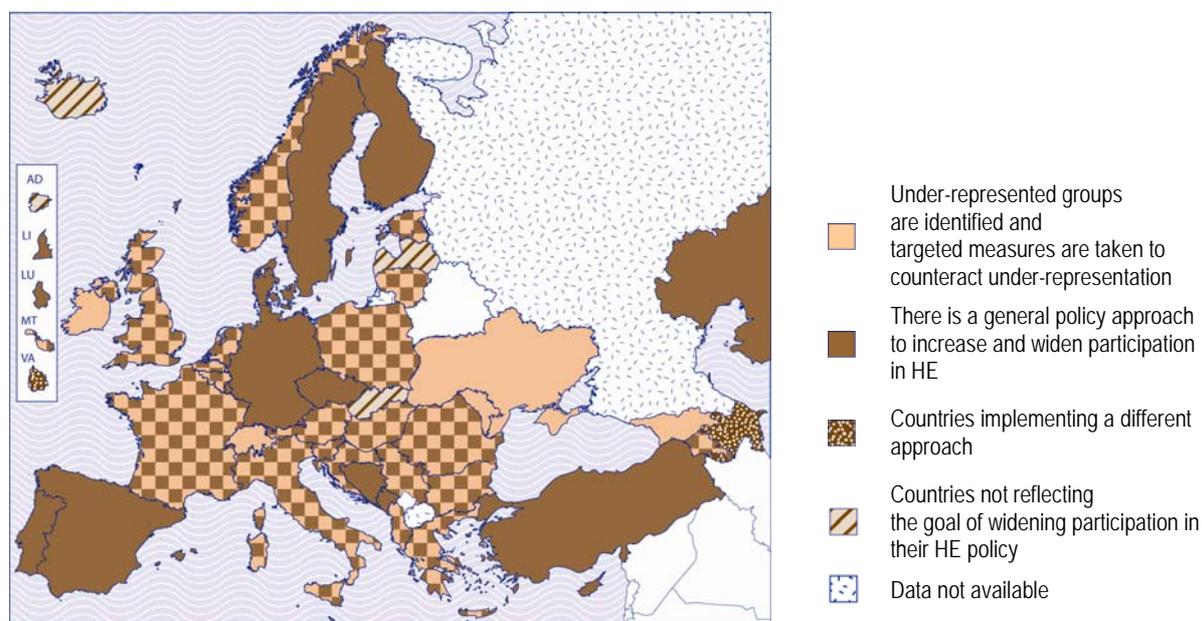
Despite the major developments that have taken place since the launch of the Bologna Process, a number of challenges remain. Many external quality assurance systems fail to take a holistic view of quality, with student services being the most commonly neglected key issue. With regard to stakeholder participation in external quality assurance, there is also some way to go before students systematically participate in all relevant processes. Participation of other key stakeholders such as employers also needs to be improved in the future. Moreover, despite the development of the European Quality Assurance Register, many countries still do not allow higher education institutions to be evaluated by agencies from outside their country.

SOCIAL DIMENSION

The social dimension is understood as the process of widening access to higher education so that the student body "entering, participating in and completing higher education at all levels should reflect the diversity of our populations" and the Bologna texts also emphasise the "importance of students being able to complete their studies without obstacles related to their social and economic background" (London Communiqué 2007, p. 5).

Despite the fact that one of the most significant trends in the European higher education in the past decade has been the noticeable expansion of the sector, this expansion has so far not benefited all societal groups in equal measure. However, almost all EHEA countries are trying to address this issue and they do so using various policy approaches. Most of them combine policy actions focusing on selected societal groups with general policy measures targeting all students (or prospective students). These measures commonly include financial support schemes, outreach programmes as well as the provision of alternative access routes to higher education, and guidance and counselling services.

National policy approaches to widening participation in higher education, 2010/11



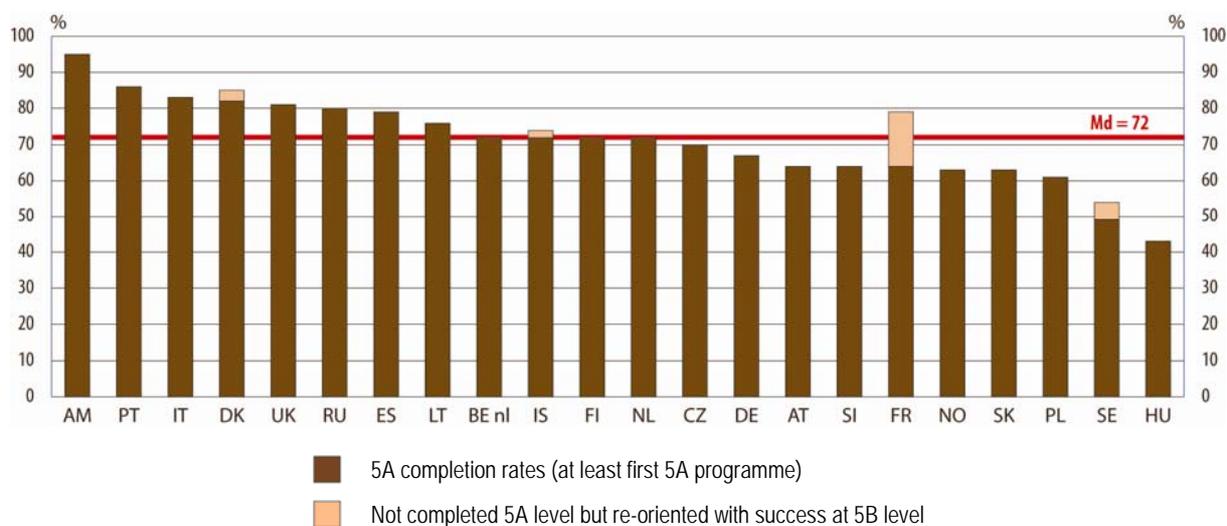
The social dimension is also inextricably connected with national practices regarding financial arrangements. The European Higher Education Area demonstrates a remarkable diversity of fee and support systems. The realities vary from situations where no students pay fees and most receive financial support to those where all pay fees and few receive financial support. The in-country and between-country levels of fees and support are also extremely diverse across countries. Thus students across the EHEA are studying in very different social and economic conditions.

The extent to which systems are able to meet students' needs, providing them with adequate services to support them along their study paths is also an essential issue for the social dimension. The report indicates that student services are characterised by a great heterogeneity of arrangements. Although the information provided by central authorities suggests that in most EHEA countries higher education institutions ensure provision of a relatively wide range of student services, the reporting does not allow a full evaluation of whether these services are accessible to all students and to what extent they respond to the needs of the diverse student body. This lack of data will need to be remedied in future reporting.

EFFECTIVE OUTCOMES AND EMPLOYABILITY

In the EHEA, an increasing percentage of the population is achieving a higher education qualification. However, not all those who enter higher education actually finish. While available data are imperfect, they indicate that more than 60 % of higher education entrants are graduating in almost all systems with a first and/or second cycle qualification. However a substantial percentage of students drop out before graduating. Moreover only a small minority of countries have adopted comprehensive national strategies addressing non-completion, and in some countries there are no targeted measures to tackle this problem.

Completion rates in tertiary type A programmes (%), 2008



	AM	PT	IT	DK	UK	RU	ES	LT	BE nl	IS	FI	NL	CZ	DE	AT	SI	FR	NO	SK	PL	SE	HU
5A completion rates (at least first 5A programme)	95	86	83	82	81	80	79	76	72	72	72	72	70	67	64	64	64	63	63	61	49	43
Not completed 5A level but re-oriented with success at 5B level	:	:	:	3	:	:	:	:	:	2	:	:	:	:	:	:	15	:	:	:	5	:

Notes: Cross-section cohort: Austria, Belgium (Flemish Community), Hungary, Lithuania, Poland, Portugal, Slovakia, the United Kingdom and Russia. True cohort: the Czech Republic, Denmark, Germany, Spain, Finland, France, Iceland, Italy, the Netherlands, Norway and Sweden. Method unknown: Armenia.

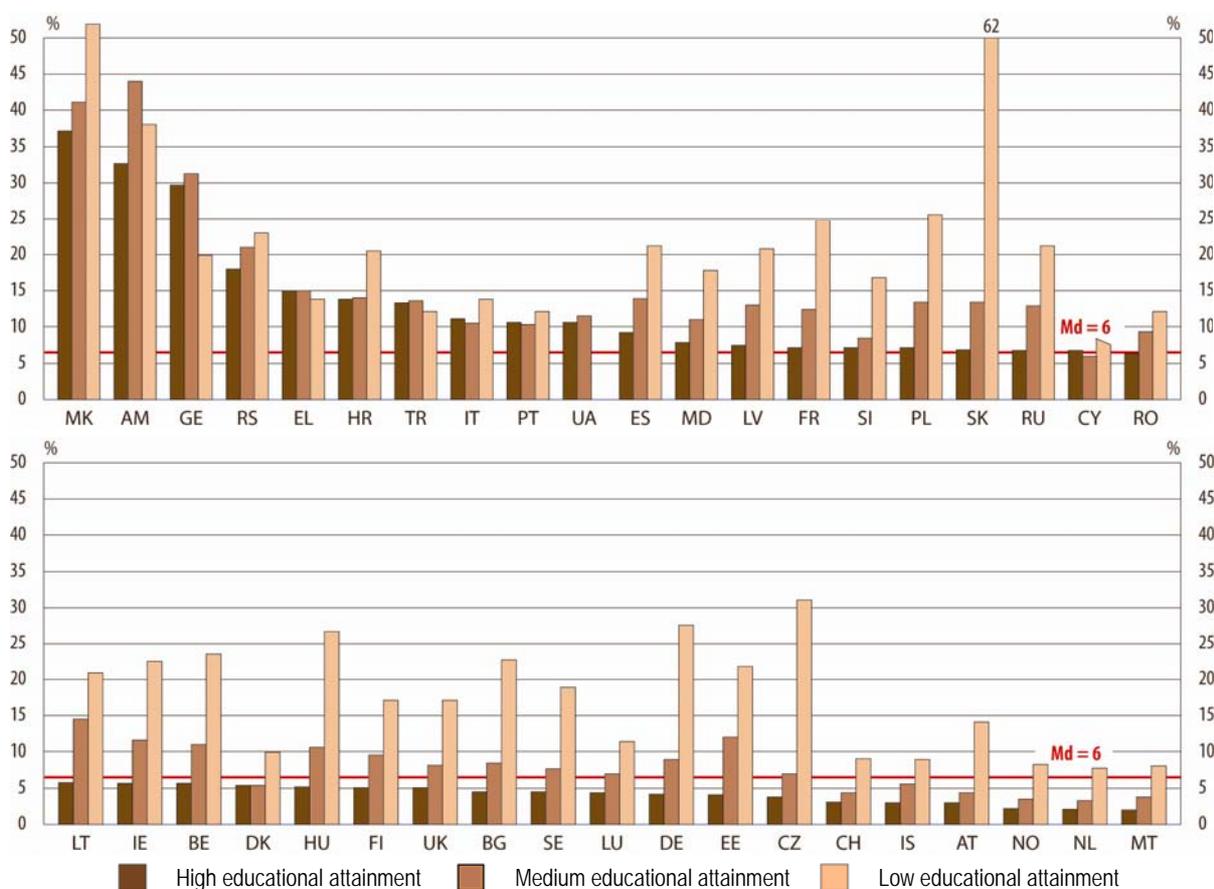
The median is calculated for ISCED 5A completion rates only.

Source: Eurostat, UOE ad-hoc module on completion rates.

Although the notion of "employability" is widely used in policy debate, there are problems in defining the indicators that can reliably show whether the situation is improving or worsening. Instead, data usually reflect the labour market situation for higher education graduates in relation to people with lower educational attainment levels.

Statistical information on unemployment ratios shows that obtaining a tertiary qualification improves the employment prospects of young people in most countries. Similarly, in all countries, people with high educational attainment find their first job faster than the group of people with only secondary education. However, there are differences among tertiary education graduates, and those who graduated within the last three years can face difficulties entering the labour market. Indeed, in half of the EHEA countries, the unemployment ratio of recent graduates is higher than 10 %, which is more than three times the median rate for young people three or more years after graduation.

Unemployment ratio of people aged 20-34 by educational attainment level (%), average 2006-2010



	MK	AM	GE	RS	EL	HR	TR	IT	PT	UA	ES	MD	LV	FR	SI	PL	SK	RU	CY	RO
High	37.2	32.7	29.7	18.0	15.2	13.8	13.3	11.1	10.6	10.6	9.3	7.9	7.5	7.2	7.2	7.2	6.9	6.8	6.8	6.4
Medium	41.1	44.0	31.3	20.9	14.8	14.0	13.6	10.5	10.3	11.5	13.9	11.0	13.0	12.4	8.5	13.4	13.4	12.9	6.0	9.4
Low	51.9	38.1	19.9	23.0	13.8	20.5	12.1	13.8	12.1		21.2	17.8	20.8	24.7	16.8	25.6	61.7	21.2	7.6	12.1
	LT	IE	BE	DK	HU	FI	UK	BG	SE	LU	DE	EE	CZ	CH	IS	AT	NO	NL	MT	
High	5.8	5.7	5.7	5.4	5.2	5.1	5.1	4.5	4.5	4.4	4.2	4.1	3.8	3.1	3.0	3.0	2.2	2.1	2.0	
Medium	14.5	11.6	11.0	5.4	10.6	9.6	8.2	8.5	7.7	7.0	9.0	12.0	7.0	4.4	5.6	4.4	3.5	3.3	3.8	
Low	20.9	22.5	23.5	9.9	26.7	17.1	17.1	22.7	18.9	11.4	27.6	21.8	31.1	9.1	9.0	14.1	8.3	7.8	8.1	

Notes: Data refers to 2010 in Georgia and Ukraine. For this reason, the Bologna median does not include these two countries.

Data are based on small sample size in most medium and small countries.

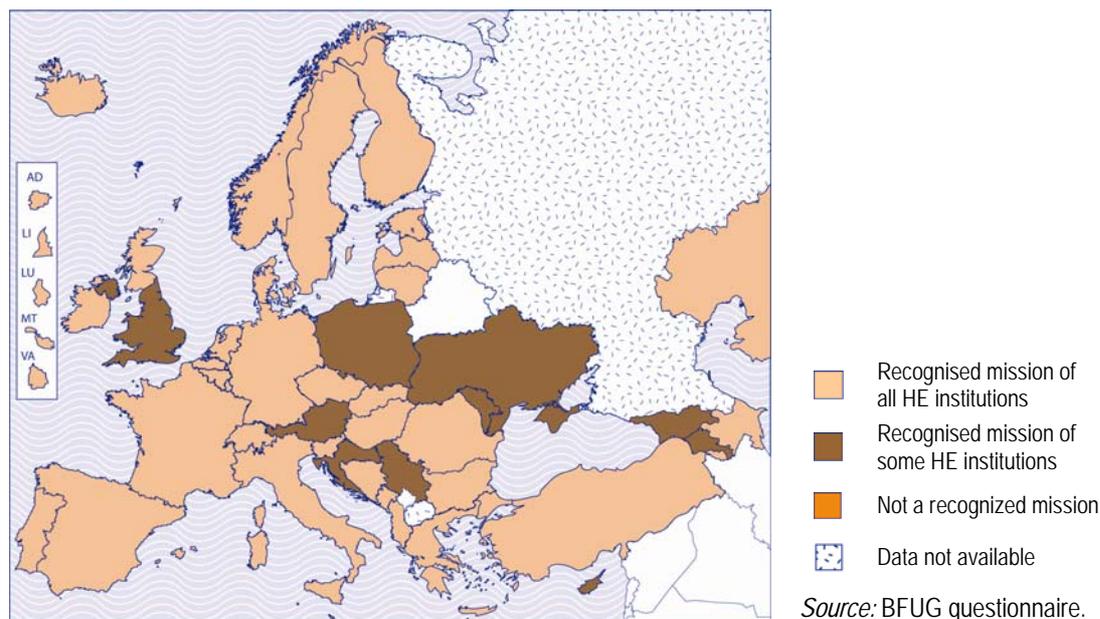
Data are sorted by the unemployment ratio of the highly educated. The median value refers to the unemployment ratio of the highly educated.

Source: Eurostat, Labour Force Survey (LFS).

LIFELONG LEARNING

The concept of lifelong learning in higher education is subject to various local, regional or national interpretations. Nevertheless lifelong learning is now a recognised mission of all higher education institutions in more than three-quarters of EHEA countries. In the rest of the EHEA countries, it is a recognised mission of at least some higher education institutions.

Lifelong learning as a recognised mission of higher education institutions, 2010/11

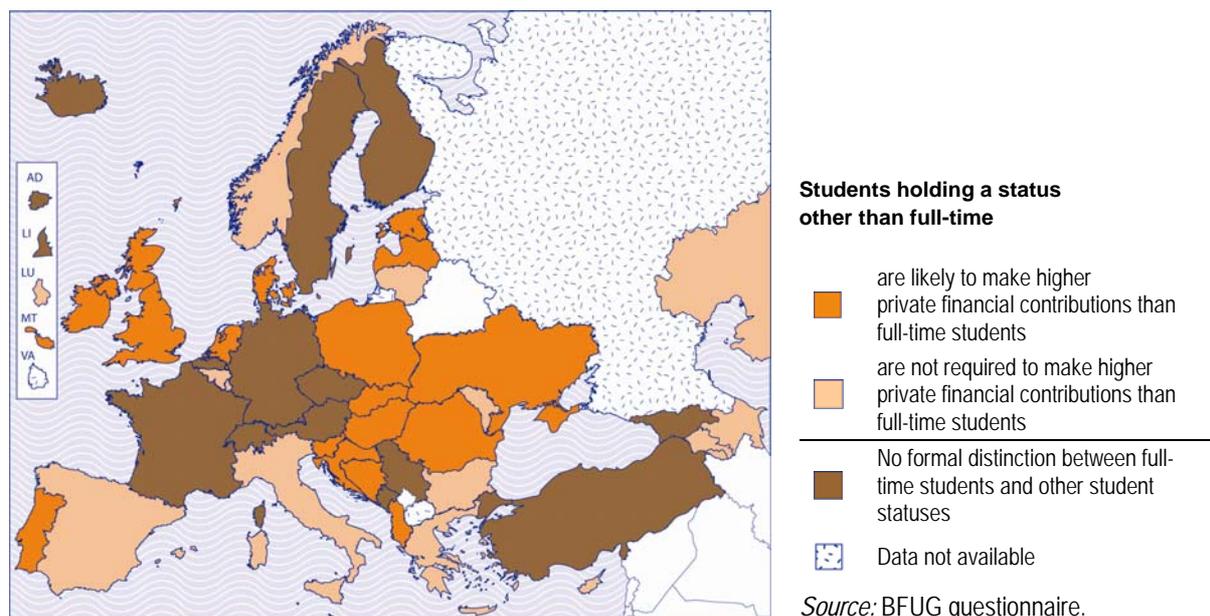


Most countries recognise the need to enhance flexible delivery of higher education programmes and they address this issue through various policy actions. While in some countries lifelong learning in higher education embraces a wide range of activities, in others, the list is still relatively limited. Overall, lifelong learning in higher education appears as a mosaic of different types of learning provision with the number of elements varying from one country to another. From a financial perspective, lifelong learning in higher education commonly involves diverse sources. Higher education institutions rarely dispose of specifically earmarked budgets to cover their lifelong learning provision. Most commonly, institutions finance lifelong learning activities from their general budgets, which are often combined with other financial means. Comparable data on the extent to which lifelong learning is financed from public sources is difficult to obtain.

Lifelong learning is closely associated with the development of systems to recognise learning acquired outside of formal education. Here countries tend to divide into two groups. Either they already have a well-established system of recognition of prior learning or they have not yet started their activities in this field. A relatively small number of countries are situated at intermediary stages, which could indicate that despite the policy attention accorded to this topic, only minor developments are actually taking place across the EHEA.

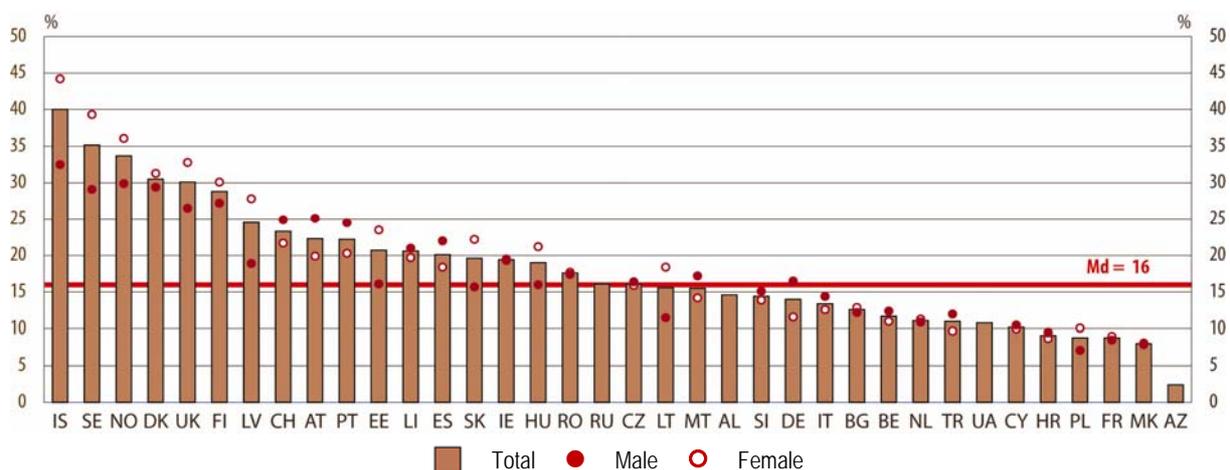
Around two-thirds of countries have established an official student status other than the status of a full-time student. Often such students (e.g. part-time students) are associated with lifelong learning programmes. Yet studying with a formal status other than full-time often requires higher private financial investment than studying under traditional arrangements. Therefore, the existence of alternative student statuses needs to be seen in close relation to financial arrangements that apply to each category of students.

Impact of formal student status on financial arrangements related to higher education studies, 2010/11



Looking at the degree of participation of non-traditional learners (in particular mature students and delayed transition students) in formal higher education programmes, the report shows that situations vary significantly. Participation rates of mature students are as low as 2 % of the total student population in some countries. At the other end of the spectrum are the Nordic countries and the United Kingdom, where mature students represent around one third of the total student population. This suggests that EHEA countries address the needs and expectations of “lifelong learners” with very different degrees of intensity.

Percentage of students enrolled in tertiary education, total and by gender, 30 or more years old, 2008/09



	IS	SE	NO	DK	UK	FI	LV	CH	AT	PT	EE	LI	ES	SK	IE	HU	RO	RU
Total	40.0	35.2	33.7	30.5	30.1	28.8	24.5	23.3	22.3	22.2	20.7	20.6	20.1	19.6	19.4	19.0	17.6	16.1
Male	32.5	29.1	29.9	29.4	26.5	27.2	18.9	24.9	25.1	24.5	16.1	21.0	22.0	15.7	19.5	16.0	17.4	:
Female	44.2	39.3	36.1	31.3	32.8	30.1	27.8	21.7	19.9	20.3	23.5	19.7	18.4	22.2	19.3	21.2	17.7	:
	CZ	LT	MT	AL	SI	DE	IT	BG	BE	NL	TR	UA	CY	HR	PL	FR	MK	AZ
Total	16.1	15.6	15.5	14.6	14.4	14.0	13.4	12.6	11.7	11.1	11.0	10.8	10.2	9.1	8.8	8.8	8.0	2.4
Male	16.4	11.5	17.2	:	15.1	16.5	14.4	12.2	12.4	10.9	12.0	:	10.5	9.5	7.1	8.5	8.1	:
Female	15.9	18.4	14.2	:	13.9	11.6	12.6	12.9	11.0	11.3	9.7	:	10.0	8.7	10.1	9.0	7.9	:

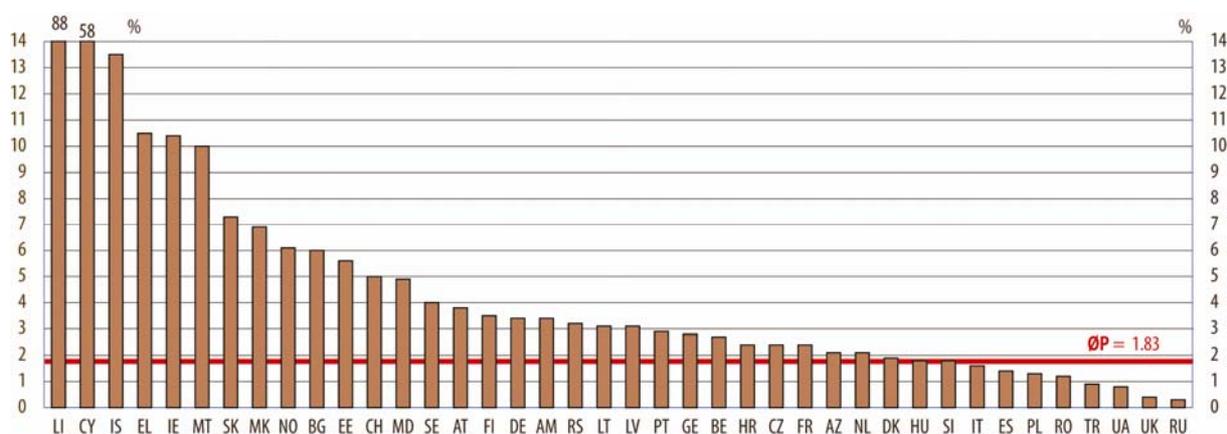
Source: Eurostat, UOE.

MOBILITY

The promotion of student and staff mobility has been given a new boost by the setting of a target for the EHEA countries: "In 2020, at least 20 % of those graduating in the European Higher Education Area should have had a study or training period abroad" (Leuven/Louvain-la-Neuve Communiqué 2009).

Statistical data to gauge the current reality is, however, as yet neither fully available nor reliable, especially for credit mobility. Indeed the Erasmus programme data is currently the only reliable guide for the scale of credit mobility. Nevertheless considerable methodological improvements have been made to capture a wider range of mobility data, particularly in the field of credit mobility, and an accurate picture should emerge in the coming years.

Outward degree mobility rate – tertiary education graduates from a country of the EHEA graduating inside the EHEA as a percentage of the total number of graduates of the same country of origin, 2008/09



LI	CY	IS	EL	IE	MT	SK	MK	NO	BG	EE	CH	MD	SE	AT	FI	DE	AM	RS	LT
87.8	58.5	13.5	10.5	10.4	10.0	7.3	6.9	6.1	6.0	5.6	5.0	4.9	4.0	3.8	3.5	3.4	3.4	3.2	3.1
LV	PT	GE	BE	HR	CZ	FR	AZ	NL	DK	HU	SI	IT	ES	PL	RO	TR	UA	UK	RU
3.1	2.9	2.8	2.7	2.4	2.4	2.4	2.1	2.1	1.9	1.8	1.8	1.6	1.4	1.3	1.2	0.9	0.8	0.4	0.3

Notes: The following destinations inside the EHEA were not included: Albania, Andorra, Bosnia and Herzegovina, Holy See and Montenegro.

For outward mobility in terms of graduation, data refer to foreign students instead of mobile students for the following countries of destination: Armenia, Azerbaijan, Belgium, Bulgaria, Czech Republic, Finland, France, Georgia, Greece, Iceland, Italy, Latvia, Liechtenstein, Malta, Poland, Portugal, Russia and Turkey.

Source: Eurostat (UOE data collection).

Currently, all but two countries show an incoming degree mobility rate of less than 10 % in the European Higher Education Area. The vast majority of countries have values below 5 %. This is also true concerning outward degree mobility rates of graduates inside the EHEA. The weighted average for this mobility flow is currently slightly below 2 %. For outward mobility of students going outside the EHEA for study, the rate for the majority of countries is less than 1 %. However, as these figures are related only to degree mobility, statistical information on credit mobility has to be added and taken into consideration when assessing progress towards the 20 % benchmark. The current projection of short-term trends in the framework of the Erasmus programme anticipates 7 % by 2020, while other sources of reliable credit mobility data also need to be identified and added.

The reporting also reveals that flows typically follow East-West patterns both in European and global terms. In the EHEA, South and Eastern Europe tend to have more outward students and North and

Western European countries more incoming students. Hardly any country can claim to have genuinely balanced mobility and even when flows reach similar numbers, the countries sending and receiving students differ significantly.

A number of obstacles that prevent students from benefitting from mobility periods abroad have been identified by reporting countries as well as by Eurostudent information. However, mechanisms to follow the evolution of these perceived obstacles are absent in many parts of Europe and many countries also lack a clear strategy to improve the situation.