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EUA Publications 2010

Trends 2010:

A decade of change in European Higher Education by Andrée Sursock & Hanne Smidt

Co-authors:

Howard Davies

Jonna Korhonen

Gerard Madill

Lesley Wilson

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Executive Summary (pagg. 6-10) INTRODUCTION: THE SCOPE OF THE REPORT

- 1. The aim of the *Trends 2010* report is two-fold. Firstly, to situate and analyse –from the viewpoint of higher education institutions the implementation of the Bologna Process in the context of the much broader set of changes that have affected higher education in Europe in the past decade. Secondly, to propose an agenda for the future of both the Bologna Process and the EHEA
- 2. The report is based on a unique longitudinal analysis of responses to two survey questionnaires to higher education institutions (821 responses) and national rectors' conferences (27 responses), which have been compared to *Trends III* (2005) and *Trends V* (2007) results. The quantitative data were supplemented with qualitative data collected through 28 site visits in 16 countries, two focus group discussions and five semi-structured interviews of regulated professional organisations.

PART I: THE BOLOGNA PROCESS IN CONTEXT

3. Higher education has been affected by a number of changes in the past decade, including higher rates of participation, internationalisation, the growing importance of knowledge-led economies and increased global competition. These changes have resulted in to two main European policies: the Bologna Process and the Lisbon Strategy, including the Modernisation Agenda for Universities. 4. Both these broader international developments and the two specific European policy processes have been translated into policy change at national level affecting principally external quality assurance, autonomy, funding and research but also the shape and size of many higher education systems. These fundamental changes, along with the implementation of the core Bologna reforms, have altered deeply all activities of HEI s, and their partnerships with other HEI s and with their stakeholders, and have at the same time increased their strategic capacity and their professionalism. 5. The Bologna Process has been increasingly embedded in this wider set of European and national policies. Where other national policy changes are at work, the Bologna Process adds yet another layer to a sometimes heavy change agenda. These changes, including those inscribed in the Bologna Process, are deep and significant, often requiring changes in attitudes and values, and always requiring effective institutional leadership. They are time and resource consuming, especially on staff members. Explaining the purposes of the reforms and convincing staff members of their benefits remains a major challenge and crucial to success.

PART II: EUROPEAN HIGHER EDUCATION INSTITUTIONS IN THE BOLOGNA DECADE

- 6. Higher education institutions and national rectors' conferences continue to be committed to the creation of the European Higher Education Area (EHEA), which they view as being globally positive and beneficial to students and institutions. The Bologna Process has introduced unifying elements that are shared by institutions across 46 countries although the diverse cultural, national and institutional contexts have led to considerable variety in implementation.
- 7. The Bologna Process has been characterised by a series of 'action lines' and tools that have been developed over the years to make the EHEA a reality and to ensure the realisation of a number underlying objectives (e.g. mobility, quality and social agenda). Although the Bologna tools and action lines are interlinked, this has not necessarily been clear to institutional actors because of the evolving nature of the policy agenda.

Degree structures and their acceptance by the labour market

- 8. A large majority of institutions have implemented the new Bologna degree structure: from 53% of institutions in 2003 to 95% in 2010. In some cases, however, the change has not led to meaningful curricular renewal, but rather to compressed Bachelor degrees that leave little flexibility for students.
- 9. A range of measures which affect both teaching and learning are being implemented in order to enhance the student experience. These can be seen at all three levels. At the Bachelor level there is

a greater emphasis on increasing and widening access, on student-centred learning and on flexible learning paths, with the attendant need for more and better targeted student support services. At the level of the second cycle, the Master degree has been introduced as a new, separate qualification across Europe in the last decade. This has proved to be a very flexible degree, albeit one that is defined differently depending upon national and institutional contexts. At the Doctoral level, the last decade has been characterised by the rapid expansion of Doctoral schools and more attention is being paid to the supervision and training of Doctoral students.

10. Employability has moved increasingly to the forefront of concerns at all levels and poses particular challenges at Bachelor level. It is difficult to assess employers' acceptance of these new first-cycle qualifications because the first graduate cohorts are recent, few institutions track their alumni's employment, and the ISCED 5 band still aggregates the Bachelor and the Master thus hindering detailed statistical analyses of employment patterns. There are strong indications, however, that many institutions expect their Bachelors to continue to the Master's level. Employers seem to accept Masters and Doctorates with relative ease.

Building flexible curricula: tools for implementation in institutions

- 11. There is some progress in shifting to modularisation, learning outcomes and to student-centred learning but this paradigm shift requires further resources to support smaller student-staff rations, adapted classrooms and staff development.
- 12. Implementation of ECTS continues to spread but is not always used for both transfer and accumulation. Use of the Diploma Supplement is growing but it seems to be relegated to an administrative function and disconnected from new developments such as learning outcomes and qualifications frameworks. These must be integrated in the Diploma Supplement, as recommended in the 2007 amended guidelines, and it must engage academics.

European frameworks at system level

- 13. Progress is being achieved in developing national qualifications frameworks (NQF) but institutions' understanding seems low particularly with respect to the importance of learning outcomes and of their central role within qualifications frameworks and in facilitating mobility and lifelong learning (through RPL). There have been some rare and very successful efforts, at national level, to delegate to institutional actors, through their rectors' conferences, the task of discussing (but in some cases also developing and implementing) NQFs.
- 14. Almost all Bologna signatories have QA agencies or have reformed their QA approaches, but without necessarily making explicit the link to the European Standards and Guidelines (ES Gs), or taking into account the enlarged scope of institutional autonomy and the expressed need of HEI s to be more strategic and contribute effectively to the knowledge society. In this context, several national QA trends are worth noting. These include the predominance of QA at the programme level, the accumulation of QA procedures, and the spread of accreditation. Institutions respond primarily to their national external quality requirements and these have not always stressed the responsibility of HEI s in this area. Finally, relatively few rectors' conferences seem involved in national QA developments.
- 15. The ES Gs and the European Quality Assurance Register (EQAR), both developed by the 'E4' group of stakeholders, have had a positive impact, primarily in internationalising the review panels, ensuring the participation of students, and further professionalising QA agencies. To ensure more effective implementation and commitment, it is critical that the ownership of the ES Gs continues to rest with the stakeholders. Responsibility for any revision of the ES Gs must continue to lie with the E4 Group.

Responding to the challenges of lifelong learning, widening participation and access

16. In the majority of European countries, lifelong learning is considered as a set of activities provided outside mainstream education, in relation to which Bologna tools such as learning outcomes and academic credits are only rarely defined or attached. Therefore, there is a clear need

for European HEI s and national authorities – together – to connect policies in order to create accessible, flexible and transparent student-centred learning and to monitor and evaluate implementation continuously. This is necessary in order to ensure that all education provision is seen within a lifelong perspective and in specific national, regional, local and institutional contexts. The joint approach advocated in EUA 's Lifelong Learning Charter, requiring the joint commitment of governments and HEI s, is essential in order to achieve success. It will also be important to act together at regional level and promote cooperation between regional stakeholders, including employers and HEI s.

17. *Trends 2010* data show that an increasing number of European HEI s have begun to rise to the challenge of attracting and teaching a more diversified student body, and to introduce institutional policies which are more inclusive and responsive. To enhance further the development and the potential success of the social dimension of the EHEA it will be vital for both national authorities and HEI s to be able to collect data on the social background of students and their attainment.

Internationalisation

- 18. Internationalisation has been identified by HEI s as the third, most important change driver in the past three years and is expected to move to first place within the next five years. More institutions are developing an integrated internationalisation approach to teaching and research through a focus on strategic partnerships. However, it is yet unclear whether this strategic approach will prevail over the more traditional form of 'bottom up' cooperation initiated by individual academics.
- 19. The priority geographical areas for international exchange have not changed much since Trends V (2007). The EU and Europe more generally remain the first and second choice; Asia keeps its third place; the US and Canada their fourth place and Latin America the fifth. The Arab world and Africa remain the lowest priority areas for higher education institutions across Europe, followed by Australia which has been losing ground since 2003.
- 20. Given the current limitations of mobility data, tentative conclusions regarding student mobility can be drawn based on the *Trends 2010* survey: institutional expectations regarding short-term mobility seem to have remained stable while the expectations for full-degree (vertical) mobility seem to be growing; the imbalance of mobility flows between East and West has remained unchanged since *Trends III* (2003). The report provide a rich documentation of institutional experience regarding obstacles to mobility which include visa or language requirements, compressed degrees, lack of funding, lack of harmonisation of academic calendars across Europe, etc. However, mobility, particularly as a period of study abroad during the Bachelor, will remain a challenge unless it is central to the institutional internationalisation strategy.
- 21. Recognition of credit transfer is a central issue in the promotion of mobility and one of the core Bologna action lines. *Trends 2010* results show minimal improvement over the decade except when recognition of study abroad periods is a centralised function in institutions. This leads to fewer problems, probably because centralisation provides a consistent and coherent way of dealing with credit transfer.

Conditions for proper implementation in institutions: student services and internal quality

- 22. The importance of student services has been relatively ignored as policy priority throughout the Bologna decade even although it is central to the shift towards a student-centred approach and to a stress on student attainment. The *Trends 2010* questionnaire data on this topic and the site-visit reports suggest that career guidance is the fastest growing area, followed by growth in psychological counselling services. This indicates that the focus is moving, to a certain extent, from providing student guidance primarily during the pre-admission phase to improving student retention and preparing students for employment.
- 23. The organisation of student services vary: in some countries, these responsibilities are shared by a variety of bodies, thus requiring good collaboration at national, regional and local level. As their primary responsibility HEI s need to ensure that students have access to the services they need. It is

also incumbent upon institutions to establish local and national links where necessary, e.g., by pooling resources with other HEI s and cooperating with national and local bodies and student organisations that have responsibilities in this area.

24. For 60% of HEI s, one of the most important changes in the past ten years has been enhanced internal quality processes. This is true particularly for institutions that are interested in European partnerships and those that deliver the Doctorate. The site visits confirm that many quality procedures are in place, often managed at faculty rather than at institutional level. As a result, there is wider ownership of quality processes and the concept of quality culture is reaching down. However, there is not always a clear feedback loop to the institution's strategic orientation. In addition, while staff development measures to improve teaching are in place in many institutions, these are not found everywhere. Thus, while good progress has been achieved, internal quality needs to be approached in a more integrated and comprehensive fashion.

Bologna Process: key challenges

- 25. Looking back over a decade of reform, it is clear that a great deal of progress has been made in the field of higher education but that the rapid implementation of 'Bologna tools' peaked around 2007. The next phase will be to deepen the change process by creating new organisational cultures. This means using the existing architecture, quality infrastructure and the Bologna tools more broadly at national and institutional level while situating them clearly within institutional and national priorities, and resource constraints.
- 26. The Bologna Process should be regarded as means to an end: its main goal is to provide the educational component necessary for the construction of a Europe of knowledge within a broad humanistic vision and in the context of massified higher education systems; with lifelong access to learning that supports the professional and personal objectives of a diversity of learners.
- 27. The different elements of the Bologna reforms have evolved through time, and have sometimes led to a fragmented and instrumental view of education that has not always facilitated understanding in institutions of the important links between the various elements. This can be improved if the tools are seen as being interconnected, and as a means of moving towards student-centred learning.
- 28. Greater coordinated communication efforts are needed. They should be centred on the benefits of the reforms to students, academics, employers and society at large.
- 29. Data collection at institutional, national and European levels must be improved. This concerns data on mobility (including 'free movers' and full-degree mobility), employability (students' entry in the labour market and their career development over several years), student-staff ratios at all degree levels, graduation and drop-out rates, time to degree, recognition of prior learning, and students' socio-economic backgrounds. In addition, given changing demographic trends, institutional analyses of staff data (by age, gender and status) are crucial in order to plan for the future.
- 30. Successful implementation of Bologna is partly conditional on the capacity of institutional leaders to bring institutional coherence to a multi-dimensional change agenda, and to explain, persuade and motivate staff members, and students. Therefore, emphasis should be placed on institutional responsibility in the further implementation of the Bologna Process and HEI s should have considerable scope in implementing the change agenda, which they must be able to relate to their specific mission and objectives, thereby respecting institutional diversity.
- 31. The success of Bologna has hinged on the involvement of all actors, including students and institutions, in policy discussions. This *modus operandi* at the European level must continue and be strengthened at the national and institutional levels in order to meet the ambitious objectives set for Europe.

PART III: A FOUR-POINT AGENDA FOR THE EHEA

32. The report shows that European higher education institutions have changed in deep and significant ways in response to international trends and European policies, including the Bologna

Process, which was examined through the prism of student-centred learning and the imperatives of ensuring both social cohesion and quality. Part III proposes a set of future policy priorities for the EHEA, based on the preceding analysis.

- 33. Institutional strategic orientations and European and national higher education policies would be enormously helped if they are framed within a broad vision of the society of the future and of its educated citizens. This would help institutions to exploit fully the link between the different elements of the Bologna Process and to engage in the required curricular and pedagogical renewal that the shift to student-centred learning entails a renewal that must be cast within a lifelong learning perspective, and with the goals of widening and increasing access.
- 34. Quality has been at the heart of the Bologna Process as demonstrated by institutional quality developments. The European Standards and Guidelines (ES Gs) were developed to support diversity across and within 46 countries while adhering to unifying principles and values. These common 'standards' are framed in such a way as to promote quality levels through the central role of HEI s. The current stress on indicators in the Bologna Process should not overshadow the importance of keeping a balance between accountability and improvement, quality measurement and quality assurance, and a thoughtful articulation between what needs to be done internally (at the level of institutions) and externally (by governmental or quasigovernmental agencies).
- 35. The Bologna Process has had multiple and positive impacts on European higher education identity within Europe and beyond. The growing European identity in the world while strong at policy level still seems to leave practical aspects of institutional behaviour unaffected. There is little joint European cooperation outside Europe, with each European country pursuing its own internationalisation strategy despite the "Global dimension strategy" adopted at the 2007 Bologna Ministerial meeting. In addition, the question as to whether European cooperation will not be diluted in internationalisation will require monitoring in future years.
- 36. Both the EHEA and the ERA create opportunities and responsibilities for European HEI s. It will be important to strengthen the links between the European higher education and research areas to enhance one of the singular strengths of European higher education the unique role of universities in ensuring a close interface between education, research and innovation. To meet these objectives EUA will also continue to advocate for closer links between the EHEA and the ERA and thus for a European Knowledge Area crucial for universities to be able to educate graduates equipped with the high level skills Europe needs for the knowledge societies of the 21th Century.

3 A Four-point Agenda for the European Higher Education Area (pagg. 94-97)

Part I focused on European higher education institutions and showed how they have changed in deep and significant ways in response to international trends and European policies, including the Bologna Process. Part II focused on the student experience and the engagement of staff by examining the different components of the Bologna reforms through the prism of student-centred learning and the imperatives of ensuring both social cohesion and quality. Part III brings these foci together – the institutions, their students and staff – and proposes a set of future policy priorities for the EHEA. Thus, strictly speaking, Part III is not a concluding chapter

about the Bologna Process (for this, cf. Part II). Rather, it presents a four-point agenda for the EHEA that addresses the question of how to sustain momentum in the Bologna Process. The proposed agenda weaves in the main cross-cutting themes that emerged in Parts I and II. It also integrates the key drivers for policy change that were identified, in particular: (i) respect and support for mission diversification and robust institutional autonomy, (ii) adequate and sustainable funding and (iii) most importantly, ensuring a broad ownership of the change process among all stakeholders through their direct involvement in the policy and decisionmaking process. Part III is set in the context of the greater synergies that are being created between the Bologna Process and the Lisbon Strategy, and calls for better links between the European research and education areas. The European Union is already building its new strategy for the next ten years in its "EU 2020" discussion document with the proposal to base "growth on knowledge". This is in sharp contrast to the mixture of current priorities in the Bologna Process: to ensure further implementation of Bologna and monitor it through a range of indicators. Thus, the central aim of the following agenda is to promote a discussion, involving all partners, of the kind of citizens Europe needs for the 21st Century, to consider its implications for higher education systems and institutions, and to find an appropriate balance between European convergence and national and institutional diversity.

3.1 European citizens for the 21st Century: lifelong access to learning

As mentioned in Part II, institutional strategic orientations and European and national higher education policies would be enormously helped if they are framed within a broad vision of the society of the future and of its educated citizens. This would help institutions to exploit fully the link between the different elements of the Bologna Process and to engage in the required curricular and pedagogical renewal that the shift to student-centred learning entails – a renewal that must be cast within a lifelong learning perspective, and with the goals of widening and increasing access. In particular, the objectives set out in the EUA "Charter on Lifelong Learning" require a shared commitment and support from governments, higher education institutions, social partners and relevant stakeholders to work closely together in the development and financial support of appropriate measures in future years. By integrating the three cycles, from the Bachelor to the Doctoral level, the Bologna Process represents an opportunity for the development of coherent policies that will encompass all three degree levels and improve their acceptance by employers. Qualifications frameworks based on learning outcomes will facilitate mobility and employability at all levels and will increase the coherence and articulation of the three cycles. These objectives must be set in the perspective of supporting the diversification of institutional missions and profiles. This will ensure that higher education systems achieve the goals of both social cohesion and quality and meet a range of societal needs through an appropriate mix of institutions with different profiles. In this context, it is crucial to consider the various drivers of diversification, most particularly quality assurance, academic careers and funding policies. It is also critical to consider how best to increase the capacity of higher education institutions to respond to a changing socioeconomic environment. This will require clearly articulated autonomy of institutions, which is a condition of their responsiveness. EUA, on behalf of its members, will continue to work on these topics in order to clarify the multiple dimensions of the concept of autonomy, and the success factors of the attendant policy changes and their impact on institutional diversification.

3.2 A partnership to support quality, creativity and innovation

Quality has been at the heart of the Bologna Process as demonstrated by institutional quality developments. European quality assurance developments – the European Standards and Guidelines (ES Gs) the European Register of Quality Agencies (EQAR), and the annual European QA Forum – have been one of the most concrete and successful aspects of Bologna and an indication that grassroots cooperation of stakeholders is a crucial success factor in a change process. One of the ongoing challenges for the next decade is to press for the continuing engagement of all stakeholders in quality assurance developments, including students. This is particularly important at national level

where evidence suggests that there is room for improvement in involving all partners in the policymaking process. This will clarify the division of labour between institutions, national authorities and quality assurance agencies, particularly in the changing context brought about by autonomy reforms and increased awareness of the strategic importance of higher education institutions to national and European knowledge societies. This dialogue must address such central questions as: (i) Are internal and external quality assurance processes supporting the modernisation agenda of higher education institutions, their strategic orientations and the requirements of knowledge-driven societies? (ii) Is the use of indicators or criteria sufficiently flexible to support the diversification of national higher education systems? The answers to these questions must be framed in the perspective of supporting meaningful quality developments by improving the articulation of internal and external quality assurance in the context of the enlarged scope of institutional autonomy and the institutions' responsibility for internal quality. At European level the challenge is to support diversity across – and within – 46 countries while adhering to unifying principles and values. These common 'standards' must be framed in such a way that they do not stifle diversity, innovative teaching practices and creative research, and that they do promote quality levels substantially through the central role of HEI s. This was the spirit in which the ES Gs were developed. The current plan to develop rankings and performance indicators for higher education must be guided by the same objectives: increase understanding of diversity rather than to standardise it and unleash innovative capacities rather than to inhibit risk taking. The current stress on indicators in the Bologna Process should not overshadow the importance of keeping a balance between accountability and improvement, quality measurement and quality assurance, and a thoughtful articulation between what needs to be done internally (at the level of institutions) and externally (by governmental or quasi-governmental agencies). EUA, with its E4 partners, will continue to work on these issues by promoting a good understanding and implementation of the ES Gs through a project to assess their use. To ensure more effective implementation and commitment it is critical that the ownership of the ES Gs continues to rest with the stakeholders. If there is a need to revise the text, this responsibility must be lodged in the E4 Group. In addition, EUA will provide an annual analysis of ranking instruments. The Association will also continue to emphasise institutional responsibility in quality assurance as well as the importance of enhancement and contextualised approaches to quality assurance.

3.3 A European higher education identity in the world

The Bologna Process has had multiple impacts on European higher education identity within Europe and beyond. Within Europe, the Bologna Process has accelerated the integration of new member states and the accession preparation of EU candidate countries. Other countries further afield have also changed significantly their higher education, with an eye on European policy developments: some are adopting the Bologna reforms as their own; others are developing local adaptations. The Bologna Process has also reinforced the European identity of institutions because they are identified as Europeans internationally. Beyond the fear of European hegemony, international perceptions are largely positive and have reinforced interest in regional integration and intra- and inter-regional dialogue and cooperation, supranational frameworks, new models of negotiating higher education policies based on government/stakeholder cooperation and, more generally, the need to rethink how higher education should respond to multiple societal demands. The growing European identity in the world – while strong at policy level – still seems to leave practical aspects of institutional behaviour unaffected. There is little European cooperation outside Europe, with each European country pursuing its own internationalisation strategy despite the "Global dimension strategy" adopted at the 2007 Bologna Ministerial meeting. In addition, there seems to be a great deal of variation in how institutions define the geographical scope of internationalisation. For some, it means any activity beyond Europe, while, for others, it refers to any activities beyond national borders. In effect, the different semantics may signal whether the primary identity or affiliation of an institution is European or not. To reinforce European presence in the world, the European Commission provides some funding opportunities for joint activities

beyond Europe's borders. If properly designed and funded, operational links between institutions and organisations across Europe and international partners could be further developed. This would contribute to promoting common European approaches to international outreach and to capitalise on European cultural and linguistic diversity. Such additional funding streams offer new opportunities to consolidate European identity in the world. However, at the same time, attention needs to be paid to the question as to whether European cooperation will not be diluted in internationalisation in the years to come, at a time when European construction – at the political level – is showing signs of fatigue. This issue will require monitoring in future years. EUA will continue to expand its international activities through concentrating on interregional dialogue and providing its members with a variety of platforms to interact with colleagues in different world regions, while continuing to promote the development of a strong European Higher Education and Research Area.

3.4 The European Knowledge Area

Both the EHEA and the ERA create opportunities and responsibilities for European HEI s, as has been highlighted throughout this report. In future it will be important to strengthen the links between the ERA and EHEA through a focus on such issues as Doctoral education, researchers' careers and mobility. This woul enhance one of the singular strengths of European higher education - the unique role of universities in ensuring a close interface between education, research and innovation. Strengthening these links will require extending the cooperation model of the Bologna Process so as to encompass the other partners, including different Ministries, that need to work together on issues such as social security, visas, portability of grants, etc. in as far as they also relate to early stage researchers' career and mobility issues. This would ensure progress on some of the slowest aspects of Bologna reforms while also addressing key challenges for the European Research Area. As documented in this report, European HEI's are facing multiple challenges that require them to be more strategic as they implement a significant and multidimensional change agenda. This requires institutional leadership and the strengthening of institutions as communities of learners and academics. In view of the current economic crisis, it is of equal importance to secure investment in the knowledge economy through sustained funding of education and research in order to reach the set goals and to avoid harming the education and prospects of the current student cohorts. Facing these challenges also requires framing the Bologna discussions in a broader context in order to refocus on the wider goals and objectives of the EHEA rather than concentrating on the more technical aspects of the implementation of specific tools. This would contribute to sharpening a communication strategy focused on conveying the benefits of these changes to individual students and academics and to society at large. Such communication is acutely needed and should be coordinated at the European, national and institutional levels. EUA will continue to support its members as they respond to their changing environment and emphasises that the success of Bologna has hinged on the involvement of all actors, including students, staff and institutions, in policy discussions. This modus operandi at the European level must continue and be strengthened at the national and institutional levels in order to meet the ambitious objectives set for Europe. To meet these objectives EUA will also continue to advocate for closer links between the EHEA and the ERA and thus for a European Knowledge Area crucial for universities to be able to educate graduates equipped with the high level skills Europe needs for the knowledge societies of the 21st Century.