



# **Study to examine the impact of the National Teams of Bologna Experts on the implementation of the Bologna Process**

*Final Report*

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## Executive summary

### Introduction

This report evaluates the relevance, effectiveness, efficiency and added value of the National Teams of Bologna Experts and their impact on the implementation of the Bologna Process in the period 2004-2011. It also provides recommendations for the future of the initiative from 2013 onwards. The evaluation is based on secondary sources, the results of online surveys of stakeholders in the initiative<sup>1</sup>, findings from ten detailed case studies and participant observation at an Information Project on Higher Education Reform (IPHER) training seminar. The evaluation took place between July 2011 and September 2012.

The strategic objective of the Bologna Experts initiative has been to support the implementation of national higher education reforms in line with the Bologna Process and to promote EU policies and programmes in higher education. The initiative aimed to achieve this through advice services to HEIs and to policy makers, and through the participation of Bologna Experts in promotion and awareness raising activities about higher education reform. Since 2006, the National Teams of Bologna Experts have been supported by the IPHERs, which have provided National Teams with a common networking and training platform. The initiative is coordinated at European level by the European Commission, with the operational support of the Education, Audiovisual and Culture Executive Agency (EACEA) and of the LLP National Agencies at national level.

### Was the initiative relevant?

On the whole, the initiative has been relevant to the needs of higher education stakeholders, in particular higher education institutions (HEIs). The current relevance of the initiative's specific objectives nevertheless varies – partly because these have remained constant over time, while the higher education environment has changed. For instance, the initiative's objectives related to providing advice to HEIs are now more relevant than those related to general promotion and awareness-raising, which were more important in the early years of implementation of the Bologna Process. While there is a need to promote recent EU actions related to higher education, this is generally already undertaken through other channels and structures and the expertise – or even awareness of their responsibilities - of Bologna Experts in this area is lower. Equally, the relevance of specific objectives varies between countries. It should also be noted that the stated objectives of the initiative are not sufficiently measurable, specific and time-bound.

The Bologna priority themes covered by the initiative (Quality Assurance, three-cycle structure and recognition) are still relevant, but there is a need to better take into account the different rate of progress achieved in these areas over the last 10 years, as well as different national situations and needs declared by HEIs.

The composition of the teams, in particular the fact that target groups are addressed by their peers, and the expertise of their members have largely been relevant to the needs of the target groups, although some key groups have not been sufficiently attracted as Bologna Experts, in particular employers.

Regarding target groups, the initiative has in practice focused on HEIs. While National Teams are expected to reach other stakeholders they have been unable to do so, due

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<sup>1</sup> National authorities in charge of higher education in the countries participating in the initiative, Lifelong Learning Programme (LLP) National Agencies and Bologna Experts, and higher educating institutions (HEIs),

to organisational, profile and resource constraints. Moreover, the balance between different activities has not ensured that the initiative fully responds to the needs of its target groups. This highlights a tension between the current focus of the initiative and the resources allocated to it.

### **How effective has the initiative been and what impact has it had?**

Assessing the effectiveness (and efficiency) of the initiative has been challenging because of an absence of comprehensive and reliable monitoring data and systems. The data gathered for this evaluation nevertheless suggests that the initiative has been more successful in producing quality outputs (such as awareness-raising events, training sessions and so forth), which are appreciated by the core target groups of the initiative (even though the number of people reached has often been lower than could be expected), than in generating the wider results and impact initially expected. Very limited evidence of results and impacts has been found, in particular at the policy level. It should nevertheless be mentioned that more evidence of results and impacts was found in some countries than others, depending on the profile and commitment of national experts, the structure and management of the team at national level, the monitoring system in place (if any), the communication strategy for the initiative and the political support from national authorities, amongst other factors.

### **Has the initiative been efficient?**

The assessment of the efficiency of the initiative shows, to the extent that available data allows, that the outputs produced have been proportionate to the resources devoted to the initiative, that displacement effects of EU investment have been low and that multiplier effects, such as the mobilisation of additional public resources to cover the management of the initiative at national level, have been achieved through the EU intervention. Potential efficiency gains have been identified, both in relation to the design of the initiative and to the IPHERs. These should be taken into account in the event of continuation of the initiative.

### **Recommendations and the future of the initiative**

The core evaluation recommendations include outlining more specific, measurable and time-bound objectives for the initiative as a whole, improving the selection processes for experts to ensure they have the expertise and skills required to help their team reach the established objectives and focusing on themes, activities and target groups that have proven most effective (i.e. provision of practical advice to HEIs in relation to the Bologna priority themes). It is also recommended that greater importance be given to the European dimension of the initiative, both to ensure consistency in its implementation and to justify more solidly the EU investment. The allocation of funds should also better reflect national needs and depend on performance and achievements of the teams (outputs, but also results and impacts). This goes together with a need to improve the monitoring system, so as to allow continuous evaluation of the initiative and contribute to its on-going improvement.

Five future scenarios are outlined in the evaluation for consideration: 1) that the initiative is discontinued, 2) that it is continued as it is, 3) an 'adapted' concept of the initiative is implemented, focusing on specific actions to consolidate the European Higher Education Area, 4) the establishment of a network of experts managed at European level and 5) Bologna Experts provide support to the peer learning and reviewing system proposed in the Bucharest Communiqué. The alternatives are compared in relation to their strategic objectives, degree of dependence on national

authorities, transnational dimension, operational objectives, target groups, management and financial aspects.

Depending on the role to be played by the European level in the management of the initiative, the evaluation recommends either option 3 or 4, complemented with option 5, in order to ensure consistency with the objectives of the Bucharest Communiqué.

## Résumé

### Introduction

Ce rapport a pour mission d'évaluer la pertinence, l'efficacité, l'efficience et la valeur ajoutée des équipes nationales d'experts de Bologne, ainsi que leur impact sur la mise en œuvre du processus de Bologne entre 2004 et 2011. Ce rapport propose également des recommandations pour le futur de cette initiative après 2013 (fin de la période de programmation actuelle). Cette évaluation se base principalement sur des sources de recherche secondaires et les résultats d'enquêtes en ligne. Ces dernières ont été soumises aux autorités nationales compétentes en matière d'enseignement supérieur dans les pays participants; aux agences nationales en charge du programme européen d'éducation et de formation tout au long de la vie ; aux experts de Bologne eux-mêmes, ainsi qu'à des établissements d'enseignement supérieur. Les données collectées ont été complétées par dix études de cas et par la participation des évaluateurs à un séminaire de formation organisé dans le cadre du projet d'information sur la réforme de l'enseignement supérieur (IPHER). L'évaluation a été menée lieu entre juillet 2011 et septembre 2012.

L'objectif stratégique des équipes nationales d'experts de Bologne est de soutenir la mise en œuvre des réformes nationales de l'enseignement supérieur dans le cadre du processus de Bologne et de promouvoir les politiques et programmes européens relatifs à l'enseignement supérieur. Pour ce faire, les experts conseillent les acteurs de l'enseignement supérieur et les établissements d'enseignement supérieur sur les différents aspects du processus de Bologne. Ils participent également à des activités de promotion relatives à la réforme de l'enseignement supérieur. Depuis 2006, les IPHERs ont soutenu les activités des experts en leur apportant une plateforme commune de formation et d'échange. L'initiative est coordonnée, au niveau européen, par la Commission européenne, avec le soutien opérationnel de l'agence exécutive "Education, Audiovisuel et Culture" (EACEA), et au niveau national, par les agences en charge du programme européen d'éducation et de formation tout au long de la vie.

### Pertinence

L'initiative est pertinente au regard des besoins des acteurs de l'enseignement supérieur, les établissements en particulier. En l'état actuel, la pertinence des objectifs spécifiques de l'initiative varie néanmoins, notamment parce que ceux-ci sont restés inchangés alors que le contexte de l'enseignement supérieur en Europe a, lui, évolué. A titre d'exemple, les activités de promotion de la réforme de l'enseignement supérieur étaient plus pertinentes au moment de son lancement qu'elles ne le sont aujourd'hui. Si la nécessité de soutenir les actions européennes en matière d'enseignement supérieur n'est nullement contestée, celles relatives à la promotion sont souvent organisées par d'autres structures et d'autres canaux de communication. De plus, les experts ignorent souvent le rôle de promoteur qu'ils doivent jouer par rapport à ces actions ainsi que leurs spécificités. De la même manière, la pertinence des objectifs spécifiques varie d'un pays à l'autre. Il est en outre important de noter que les objectifs de l'initiative ne sont globalement pas suffisamment spécifiques, mesurables et définis dans le temps.

Les axes prioritaires du processus de Bologne (démarche qualité, organisation des études en 3 cycles, reconnaissance académique et professionnelle) sont toujours pertinents, mais les progrès réalisés au cours de ces dix dernières années doivent être mieux pris en compte, ainsi que différentes situations au niveau national et les priorités telles qu'exprimées par les établissements d'enseignement supérieur.

L'expertise des membres et la composition des équipes sont tout à fait pertinentes au regard des besoins des groupes cibles. Cela est notamment vérifiable au niveau des équipes nationales qui incluent (souvent) des membres choisis parmi chaque groupe cible (certains groupes, comme les employeurs, sont toutefois insuffisamment représentés dans les équipes dans la majorité des cas).

L'initiative a essentiellement ciblé les établissements d'enseignement supérieur (au détriment des autres acteurs), principalement pour des questions de ressources et des contraintes organisationnelles. De plus, le panel d'activités proposé n'a pas permis à l'initiative de répondre pleinement aux besoins des groupes cibles. L'évaluation met en effet en évidence une tension entre les priorités actuelles de l'initiative et les ressources qui y sont consacrées.

### **Efficacité et impacts**

L'analyse de l'efficacité (et de l'efficience) de l'initiative a été délicate en raison des limitations du système utilisé pour en mesurer les résultats. Les données collectées suggèrent néanmoins que l'initiative a été efficace au niveau de ses extrants (événements informatifs, sessions de formation, etc.), jugés de qualité par les groupes cibles (même si le nombre de personnes touchées est souvent en deçà des objectifs). En revanche, son efficacité a été moindre au niveau de la production des résultats et impacts escomptés. L'évaluation n'a mis en évidence que peu d'éléments relatifs aux résultats et impacts. Cela a notamment été observé au niveau politique en ce en dépit de variations selon les pays (résultant entre autres du profil et de l'implication des experts ; de la structure et de la gestion de l'équipe au niveau national ; de l'existence (ou non) d'un système national de mesure des résultats ; de la stratégie de communication de l'équipe, ainsi que du soutien apporté par l'autorité nationale et du contexte national).

### **Efficience**

L'analyse des données disponibles montre que les équipes nationales ont été efficaces au niveau de ce qu'elles ont produit sur base des ressources allouées à l'initiative. L'évaluation montre également que les effets de déplacement de l'investissement européen semblent avoir été limités mais que des effets multiplicateurs ont été observés, tels que la mobilisation de ressources publiques additionnelles pour financer la coordination de l'initiative au niveau national. L'évaluation a également identifié des gains d'efficience, à la fois au niveau du concept de l'initiative et des IPHERs, à prendre en compte en cas de poursuite de l'initiative.

### **Recommandations et futur de l'initiative**

Parmi ses recommandations principales, cette évaluation propose d'établir des objectifs plus spécifiques, mesurables et définis dans le temps ; de revoir le processus de sélection des experts au niveau national afin de s'assurer qu'ils aient l'expertise et les compétences requises pour permettre à leur équipe d'atteindre ses objectifs ; et de

concentrer le travail des experts sur les activités, thèmes et groupes cibles pour lesquels ils se sont montrés les plus efficaces (c.-à-d. conseil aux établissements supérieur sur les axes prioritaires du processus de Bologne). L'évaluation recommande également de donner une plus grande importance à la dimension européenne de l'initiative afin d'assurer la cohérence de sa mise en œuvre dans chaque pays participant, mais aussi pour en justifier l'investissement européen. La façon dont sont alloués les fonds devrait aussi mieux refléter les besoins nationaux et dépendre des performances des équipes, y compris leur impact. Cette recommandation va de pair avec le besoin plus global d'améliorer le système de mesure et d'évaluation continue dans le but d'améliorer l'initiative elle-même.

Cinq scénarios ont été identifiés sur base de cette évaluation : l'arrêt de l'initiative (1); sa poursuite dans sa forme actuelle(2); une refonte de l'initiative centrée sur des actions spécifiques visant à consolider l'espace européen de l'enseignement supérieur (3); la mise en place d'un réseau d'experts coordonné au niveau européen (4); et un rôle spécifique pour les experts dans le système d'activités d'apprentissage en équipe proposé dans le Communiqué de Bucarest (5). Les alternatives ont été comparées en tenant compte des objectifs stratégiques, du degré de dépendance des équipes par rapport à leur autorité nationale, à la dimension transnationale, ainsi qu'aux objectifs opérationnels, aux groupes cibles et à la dimension financière de l'initiative.

L'évaluation recommande la poursuite de l'initiative suivant l'option 3 ou 4, en fonction du rôle que le niveau européen est prêt jouer dans sa gestion. L'évaluation recommande en outre que l'option choisie devrait être complétée par l'option 5, afin d'assurer la cohérence de l'initiative avec les lignes directrices du Communiqué de Bucarest.

## Zusammenfassung

### Einleitung

Dieser Bericht evaluiert die Bologna-Experten-Teams in Bezug auf ihre Effektivität, Effizienz und deren Rolle und Auswirkungen bei der Implementierung des Bologna Prozesses zwischen 2004-2011 und gibt Empfehlungen für eine zukünftige Initiative nach 2013. Die Evaluierung basiert auf Sekundärquellen, Ergebnissen von online Befragungen nationaler Behörden teilnehmender EU Mitgliedsstaaten, Nationaler Agenturen des ‚Lifelong Learning‘ Programms (LLP), Bologna-Experten und Hochschulen; und außerdem auf Ergebnissen 10 detaillierter Fallstudien und teilnehmenden Beobachtungen während eines Training Seminars im sogenannten Information Project on Higher Education Reform (IPHER). Die Evaluierung fand zwischen Juli 2011 und September 2012 statt.

Strategisches Ziel der Bologna-Experten-Initiative war es, die nationalen Hochschulsysteme bei der Implementierung der Bologna-Reformen zu unterstützen und die EU Politiken und Programme im Bereich der Hochschulausbildung zu fördern. Ziel der Initiative war u.a. die Beratung von Hochschulen und politischen Entscheidungsträgern. Zudem nahmen die Bologna-Experten an Aktivitäten teil, die das Bewusstsein für die Bologna-Reformen schärfen sollen. Seit 2006 wurden die nationalen Bologna-Experten-Teams vom sogenannten ‚Informations-Projekt Hochschulreform (IPHER)‘ unterstützt. Dieses gemeinsame Netzwerk hat eine Trainingsplattform für die Experten-Teams bereit gestellt.

Die Bologna-Experten-Initiative wird auf EU-Ebene durch die Europäischen Kommission, mit Unterstützung der Exekutivagentur für Bildung, Audiovisuelles und Kultur (EACEA) und, auf nationaler Ebene, von den nationalen Agenturen des LLP, koordiniert.

### Relevanz der Initiative

Die Bologna-Experten-Initiative ist vor allem für die Bedürfnisse der Vertreter von Hochschulen von Bedeutung. Die Relevanz einzelner Ziele der Bologna-Experten-Initiative hat sich mit der Zeit jedoch verändert, da sich die anfangs gesteckten Ziele nicht den laufenden Reformprozess in Hochschulbereich angepasst haben, z.B. sind die zu Beginn ergriffenen Maßnahmen zum "awareness-raising" des Bologna Prozesses mittlerweile weniger relevant als noch am Anfang. Die Relevanz einzelner Ziele ist auch abhängig von den Fortschritten in unterschiedlichen Ländern, die durchaus variable sind. Hinzu kommt, dass nicht alle gesteckten Ziele der Bologna-Experten-Initiative messbar und spezifisch genug waren.

Die vorrangigen Themen der Bologna-Experten-Initiative (Qualitätssicherung, Einführung des Drei-Zyklus-Systems und Anerkennung) haben jedoch nichts an Aktualität verloren. Dennoch ist es notwendig, die unterschiedlichen Stufen der Fortschritte über die letzten 10 Jahre besser zu verdeutlichen, und den verschiedenen nationalen Situationen und Bedürfnissen der Hochschulen mehr Aufmerksamkeit einzuräumen.

Die Zusammensetzung der Teams, insbesondere deren Qualifizierung um zielgerichtet Fachkollegen zu adressieren, sowie die Kenntnisse der Teammitglieder waren weitgehend im Einklang mit den Zielen der Bologna-Experten-Initiative und die

Bedürfnisse der Zielgruppen. Dennoch fehlt den Bologna Experten Teams eine gewisse Breite bei den Berufsprofilen der Mitglieder, z.B. sind wenige Arbeitgeber vertreten. Die Zielgruppen der Bologna-Experten-Initiative waren praktisch ausschließlich Institutionen im Bereich der Hochschulbildung. Obwohl nationale Teams die Aufgabe hatten, auch zu anderen Interessensvertretern Kontakt aufzunehmen, war dies bisher nicht erfolgreich, auf Grund von Bedingungen in der Organisation, dem Berufsprofil der Experten und der Ressourcen. Dies unterstreicht die Problematik zwischen dem momentanen Fokus der Bologna-Experten-Initiative und den verfügbaren Ressourcen. Dadurch, dass die Prioritätsetzung der einzelnen Ziele nicht im vollem Maße den Bedürfnissen der Zielgruppen entsprachen, hat auch die Initiative an Relevanz mit der Zeit abgenommen.

### **Effektivität und Auswirkung der Initiative**

Die Bewertung des Erfolgs (und der Effizienz) der Bologna-Experten-Initiative wurde erschwert durch die Abwesenheit von umfassenden und verlässlichen Bewertungs- und Beobachtungs Systemen. Die Daten, die für diese Auswertung gesammelt wurden, deuten darauf hin, dass die Bologna-Experten-Initiative mehr Erfolg durch konkrete Veranstaltungen hatte, wie zum Beispiel "awareness-raising-Veranstaltungen, Schulungen, etc., die bei den Zielgruppen der Initiative gut angenommen wurden (obwohl die Anzahl der Teilnehmer oft niedriger war als erwartet), als bei der Verwirklichung der generellen Ziele die Anfangs festgelegt wurden. Bisher deutet nur wenig darauf hin, dass die Initiative Einfluss auf die politische Ebene genommen hätte. Es sei jedoch erwähnt, dass der Nachweis von Ergebnissen und Nutzen in einigen Ländern sichtbarer ist als in anderen, je nach Profil und Engagement des nationalen Experten, Struktur und Management des nationalen Teams, Bewertungs- und Beobachtungs-Systemen (falls vorhanden), Kommunikationsstrategie für die Initiative, und politische Unterstützung der nationalen Behörde / des nationalen Kontext, neben anderen Faktoren.

### **Effizienz der Initiative**

Die Beurteilung der Effizienz (soweit Daten verfügbar waren) der Bologna-Experten-Initiative zeigt, dass die Resultate angemessen im Verhältnis zu den zur Verfügung gestellten Ressourcen stehen. Des Weiteren wurden die Fehleffekte gering gehalten und die Multiplikatoreffekte, wie die Mobilisierung zusätzlicher öffentlicher Mittel um die Verwaltung der Initiative auf nationaler Ebene zu decken, durch die Intervention der EU erreicht. Mögliche Effizienzgewinne durch die Initiative sind, sowohl in Bezug auf das Design der Initiative, als auch bei den IPHERs, ersichtlich. Diese sollten berücksichtigt werden bei einer möglichen Fortsetzung.

### **Empfehlungen und die Zukunft der Initiative**

Zu den wichtigsten Empfehlungen der Evaluierung gehören: Erstens, dass mehr konkrete, messbare und zeitlich festgelegte Ziele zu Anfang formuliert werden; Zweitens, dass eine Verbesserung der Auswahlverfahren für Experten sichergestellt wird, so dass die erforderlichen Kenntnisse und Fähigkeiten vorhanden sind, damit die Teams die Ziele erreichen und sich auf Themen, Aktivitäten und Zielgruppen fokussieren können die sich als am Effektivsten erwiesen haben (zum Beispiel die Bereitstellung von praktischen Ratschlägen für Hochschulen im Bezug auf die

vorrangigen Bologna Themen). Außerdem wird empfohlen, dass der europäischen Dimension der Initiative eine größere Bedeutung beigemessen wird. Dies, um die Kontinuität bei der Umsetzung zu garantieren, um somit auch die EU Finanzierung besser zu rechtfertigen. Die Zuweisung der Mittel sollte ebenfalls besser die nationalen Bedürfnisse widerspiegeln und sich nach Leistung und Ergebnisse der Teams richten. Dies geht mit der Erfordernis einher, dass Bewertungs- und Monitoring-System zu verbessern, um so eine kontinuierliche Evaluierung der Bologna-Experten-Initiative zu ermöglichen und damit zur laufenden Verbesserung beizutragen.

Fünf Zukunfts-Szenarien werden in der Auswertung zu heuristischen Zwecken umrissen: die Bologna-Experten-Initiative wird beendet (1), die Initiative wird im gleichen Rahmen fortgesetzt (2), dass sie mit einem angepassten Ansatz fortgeführt wird, der auf spezifischen Maßnahmen fußt und den Europäischen Hochschulraum konsolidiert (3), die Einrichtung eines Netzwerks von Experten auf europäischer Ebene (4) und Bologna-Experten als unterstützendes Instrument im Rahmen der Peer-Learning und Peer Review-Initiative der Erklärung von Bukarest (5). Die Alternativen werden in Bezug auf ihre strategischen Ziele, Grad der Abhängigkeit von den nationalen Behörden, transnationaler Dimension, operative Ziele, Zielgruppen, die Verwaltung und finanzielle Mittel, vergleichend dargestellt. .

Die Evaluierung empfiehlt, dass die Initiative fortgesetzt werden sollte, jedoch mit einem Fokus auf die europäische Dimension und auf Bereiche, die im Rahmen der Initiative als erfolgreich wahrgenommen wurden oder noch in der Zukunft benötigt von Relevanz sind (strategische Beratung von Hochschulen, die Organisation von kleinen und praktischen Veranstaltungen und Fachgruppen Austausch). Die zukünftige Initiative sollte auch dafür Sorge tragen, ein Gleichgewicht zwischen der Europäischen und der nationalen Ebene mit Bezug auf Verwaltung, herzustellen. Sie sollte außerdem auf ein kontinuierliches Monitoring- und Bewertungs-System setzen, sowie auf eine kontinuierliche Verbesserung hinarbeiten. Dies könnte durch eine Kombination der Optionen 3 und 4 (abhängig von der Rolle, die die europäische Ebene in der Verwaltung der Initiative spielen wird), mit Ergänzung durch Option 5, erreicht werden.

# 1 Introduction

## 1.1 Objectives of the evaluation and content of this report

This document is the final report of the first evaluation of the National Teams of Bologna Experts. This study was commissioned to GHK Consulting Ltd. and Technopolis Ltd.<sup>2</sup> under the framework Contract for Evaluation, Evaluation Related Services and Support for Impact Assessment<sup>3</sup>. Many studies have attempted to assess the impact of the Bologna Process, or the effects of initiatives such as the Erasmus Programme on the Bologna Process, but this is the first time that the Bologna Experts initiative has been evaluated since it started in 2004 under the name “Bologna Promoters”.

The general objective of this evaluation was to assess the impact of the National Teams of Bologna Experts on the implementation of the Bologna Process and to provide recommendations regarding the future of this initiative post 2013. The specific objectives of the evaluation were<sup>4</sup>:

- To assess the impact of the National Teams of Bologna Experts on the implementation of the action lines of the Bologna Process and of the Modernisation Agenda for Higher Education;
- To assess the cost-effectiveness of the Bologna Experts initiative;
- To assess the added value of the EU budget investment.

The evaluation took place between July 2011 and September 2012.

## 1.2 The Bologna Experts initiative at a glance

The development of European higher education in the last decade has been strongly marked by the intergovernmental Bologna Process, which was launched by the Ministers of Education of 30 European countries in 1999. The main objective of the Bologna Process has been to create a unified European Higher Education Area, with more compatible and comparable higher education systems, to facilitate mobility between European countries, improve the employability of students, and strengthen the competitiveness and attractiveness of European higher education within Europe and in relation to third countries.

In preparation of the 2005 Bergen Ministerial conference, the European Commission assessed the state of play of the Bologna Process and its implementation in Europe. In consultation with the main stakeholders and taking into account findings from research in this area<sup>5</sup>, it proposed to invite academics, students, HEI administrators and other higher education experts who were considered successful in contributing to the implementation of the Bologna Process in their institutions (Bologna promoters, later Bologna Experts) to provide support and advice to their peers and share good practice about the implementation of the Bologna Process at institutional level<sup>6</sup>.

Thus, the general objective of the initiative is to support higher education reform in Europe, increasing awareness, understanding, and acceptance of the Bologna Process and contributing to consistent implementation of Bologna-related reforms, notably in

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<sup>2</sup> Contract EAC-2011-0253

<sup>3</sup> Contract EAC/50/2009

<sup>4</sup> Terms of Reference (ToR)

<sup>5</sup> Sources: see EUA Trends III report and Eurydice reports on Higher Education in Europe

<sup>6</sup> From Berlin to Bergen - The EU Contribution - Progress Report 7 April 2005

Bologna priority areas such as quality assurance, three-cycle system and recognition. Since 2008, the remit of Bologna Experts' activity has included additional topics, such as mobility; lifelong learning; modernisation of Higher Education and Youth on the Move.

The first Restricted Call for proposals for National Teams of Bologna Promoters was launched in 2004. Today, Bologna Experts are expected to support the implementation of the Bologna Process by providing individual counselling and advice to HEIs, participating in promotion and dissemination activities on topics related to the Bologna Process and by providing inputs to national authorities on higher education policy reforms.

The initiative is co-financed through a European grant and is managed at strategic level by DG EAC and, from 2008, by the Education, Audiovisual and Culture Executive Agency (EACEA) at operational level. National Teams work under the direction of national authorities for higher education, often in cooperation with the LLP National Agencies for the Lifelong Learning programme (LLP).

The initiative is supported through the Information Projects on Higher Education Reform (IPHERs). The IPHERs aim to provide a comparative perspective on the implementation of Bologna reforms, and an opportunity for experts to share good institutional and national practice through the production of materials, seminars, study visits and a virtual community.

### **1.3 Methodology and evaluation questions**

The evaluation is based on evidence collected through the following methods:

- Desk research covering Bologna Experts initiative and related activities since 2004:
- Three online surveys targeting HEIs; Bologna Experts and LLP National Agencies; and national authorities in participating countries. 444 responses were collected in the survey of HEIs, 203 in the survey of Bologna Experts and National Agencies (respectively 184 and 19) and 23 in the survey of national authorities (representing 19 countries). Response rates varied between 10% for HEIs and 59% for National Agencies.
- Case studies in ten selected participating countries, that ensured different degrees of implementation in the Bologna Process, sizes and provided a geographical spread across Europe: Estonia, France, Germany, Hungary, Norway, Poland, Portugal, Spain, Turkey and United Kingdom.
- Participant observation in one of the IPHER training seminars.

These different data collection methods enabled the triangulation of views and researchers, enhancing the validity of the results presented.

The data collection activities carried out are presented in more detail in Annex 2, which also includes a discussion of the rationale for the selection of particular methods (e.g. their role in the evaluation) as well as an assessment of their advantages and disadvantages.

The evaluation questions included:

- the **relevance** of the initiative when it was designed as well as its future relevance in the context of the European Higher Education Area (EHEA)<sup>7</sup> and the Higher Education Modernisation Agenda;
- the **effectiveness** of the Bologna Experts initiative, in particular its impacts on higher education reforms related to quality assurance, the three cycle system<sup>8</sup>, recognition<sup>9</sup>, and mobility<sup>10</sup>; and the effectiveness of the initiative's **management** model<sup>11</sup>;
- the **efficiency** of initiative; and
- the **added value** of the EU budget investment.

The evaluation questions covered the Bologna Experts initiative and the IPhER project.

A detailed evaluation framework is presented in Annex 1. This framework informed the design of the evaluation data collection tools.

The figure below presents an overview of the relationship between the evaluation questions, framework, sources of information and analysis.

**Figure 1.1 Evaluation framework**



Source : GHK

## 1.4 Challenges and limitations

It is relevant to note that this evaluation faced a number of challenges and limitations:

- *Heterogeneity of the baseline situation*

<sup>7</sup> formally launched in Spring 2010.

<sup>8</sup> Including the European Qualification Framework (EQF)

<sup>9</sup> Including the European Credits Transfer System and the Diploma Supplement – (ECTS and DS)

<sup>10</sup> In particular Erasmus.

<sup>11</sup> In particular the respective roles of the European Commission (and its sub-contractors), the Education Audiovisual and Culture Executive Agency (hereafter EACEA), the National Authorities and National Agencies in participating countries.

Countries were in different situations with regard to the use of credit systems, having progressive qualifications structures or having formalised quality assurance procedures when Bologna related reforms were introduced. They also differed in the shape of their higher education sectors. The efforts the Bologna Experts had to deploy to enhance the understanding of Bologna related reforms therefore also differed from country to country (in some countries the concepts introduced were new whilst in others they were already in use). The impact of the initiative in different countries therefore could be expected to differ. The evaluation concentrates on the impact of the initiative as a whole, and not on a detailed assessment of country situations. Some of the statements will thus be more applicable to some countries than others. On the whole, however, it is worthwhile to note that the evaluation found a high degree of consistency of views on the assessment of the initiative by various stakeholders in different countries.

- *The nature of the objectives of the initiative*

The objectives of the initiative were usually expressed in general and not quantifiable terms. The absence of SMART<sup>12</sup> (Specific, Measurable, Attainable, Relevant and Time-bound) objectives has consequences in terms of monitoring progress and evaluating the initiative as a whole. This aspect is developed in more detail in section 2 of this report.

- *'Confusion' between the work done by the experts as part of activities of Bologna Experts' teams and their work outside the initiative (deadweight and additionality)*

The Bologna Experts team members are appointed because of their expertise in the Bologna Process and their activities in promoting higher education reform. Consequently Bologna Experts are already doing, to a certain extent, Bologna 'promotion' work before they are appointed. This situation does not change when they are appointed, although being appointed as a Bologna Expert gives them an additional degree of recognition for their actions. In addition Bologna Expert teams receive a financial contribution for specific actions they would not do otherwise (such as preparing documents, guides, etc.). Consequently the evaluation aimed to differentiate between the work that the experts would have done anyway (had they not been appointed as Bologna Experts) and the work that was directly enabled by the EU funding. This was done, for instance by asking interviewees that had worked with Bologna Experts whether they had identified such experts before they had been nominated as Bologna Experts, whether they would have been able to identify them without the initiative structure (website, etc.), or whether a specific event would have been organised without funding from the initiative. Such differentiation, however, is not always straightforward.

- *Difficulty to measure the specific impacts of Bologna Experts' work (causality)*

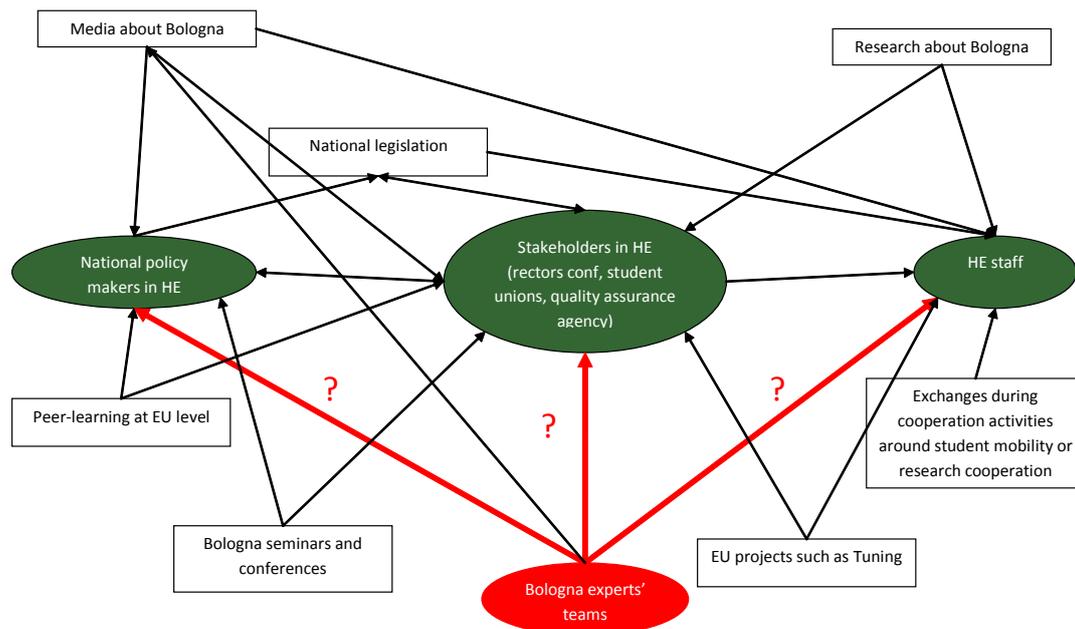
Bologna Experts are expected to influence national reforms related to the Bologna Process as well as institutional practice in this area. However, the National Teams of Bologna Experts represent a total EU investment of EUR 1,200,000 annually (on average) since 2004. Additionally, about EUR 250,000 are dedicated to support them

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<sup>12</sup> European Commission (2009) Impact Assessment Guidelines, 15 January 2009. SEC (2009)/92.

at European level under the IPHERs. This size of the initiative is rather small. Moreover, many other processes and mechanisms shape these processes and influence decision-makers at policy and institutional level and practitioners, as reflected in the figure below. Causality chains are therefore complex.

**Figure 1.2 Bologna Experts' teams' and other interventions with possibly similar effects**



Source : GHK Consulting

The strategy to assess the impact of Bologna Experts was based on the inclusion of references to other initiatives and developments in the data collection tools, and on the inclusion of participants in alternative processes in the list of interviewees to record the perception of stakeholders in the process and their appreciation of the extent of the contribution of Bologna Experts. The evaluation also reviewed the institutional roles that Bologna Experts played in different processes at the policy and institutional level (e.g. what was their representation in relevant policy or institutional working groups). In practice, the causality problem was lower than anticipated given that the evaluation did not find strong impact claims to be probed.

- *Lack of monitoring data*

Bologna Experts' teams submit reports that cover the period for which funding was provided. These reports are the main source of information about their work. Yet, the nature of the information provided in them varies greatly and the information they contain is often of a rather general nature. To overcome this shortcoming the evaluation required a substantial degree of primary data collection.

- *Diversity of budgets allocated to Bologna Experts' teams*

The budget allocations to teams of national experts vary significantly across EU countries depending on the size of their student populations. Countries with larger populations have significantly more HEIs to reach. However, the costs of developing

an explanatory document, newsletter or a web-site are relatively independent of the sizes of the target group. Whilst budget allocations are also partly justified by the fact that National Teams bring together a larger number of experts in large countries than in other countries budget differences are not proportionate to differences in the size of teams. Consequently some countries have substantially more resources to put into the promotion and development activities than others. While the evaluation provides an overall assessment for the initiative as a whole, this suggests that there are differences in the degree of cost-effectiveness of teams by country.

## 2 Intervention logic

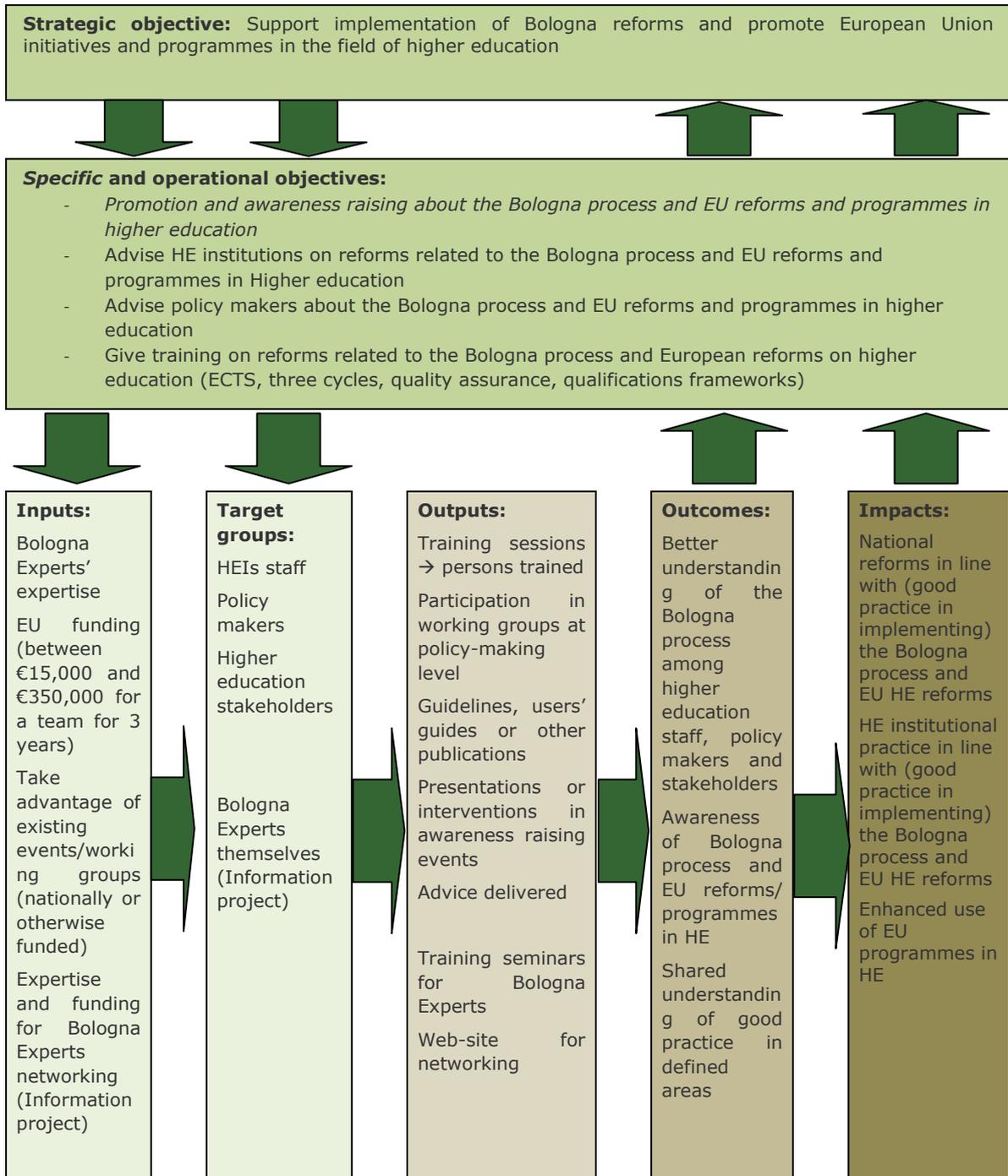
### 2.1 Description of the intervention logic

The evaluation exercise started with the clarification of the intervention logic of the initiative. This aims to explain in a systematic manner why the action in question was launched (e.g. the problems to which it aims to address and the demand for change in relation to those problems), what it aims to achieve and how it will be implemented through specific actions, which have intended outputs, outcomes and impacts. While some of these aspects can be inferred from the initiative's calls it was necessary to complement the information provided there with additional sources and structure this information in a more coherent framework. The intervention logic presented was drawn on the bases of documentary review (calls for proposals, preparatory documents and communiques of the Bologna Process ministerial meetings and Bologna fora) and scoping interviews with key stakeholders.

The strategic objective of the initiative is to support the implementation of Bologna reforms and promote EU initiatives in higher education. While the first part of this strategic objective was central in the first years of the initiative, promotion aspects have gained importance more recently, expanding the remit of experts. Support to the implementation of Bologna reforms and EU initiatives is to be provided through two specific mechanisms: promotion and awareness-raising. These, in turn, materialise in more concrete terms in the provision of advice, support and training to those stakeholders who have a direct influence on the direction of reforms (policy-makers) as well as those who eventually are charged with making Bologna a reality (HEIs) as well as in the production of guidelines and information materials.

The main elements of the intervention logic are summarised in the graph below. It must be noted that this intervention logic does not suggest that the National Teams of Bologna Experts are the only factor in enabling the achievement of the initiative's objectives. This initiative, as explained in section one, is one contributory tool amongst a range of tools used by the EU and other parties with this aim.

**Figure 2.1 Outline of the intervention logic**



Source: GHK

A fuller summary of the background information obtained to draw to intervention logic of the initiative is presented in Annex 3.

## 2.2 Intervention logic: assessment of the objectives of the initiative

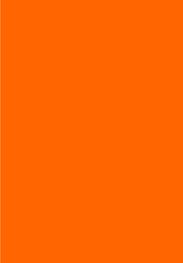
The European Commission requires that the objectives of any initiative should be related to the problem it aims to address and its root causes and be SMART<sup>13</sup> (Specific, Measurable, Attainable, Relevant and Time-bound). This section presents an assessment of the degree to which the objectives of the Bologna Experts' initiative can be considered SMART. The assessment<sup>14</sup> shows that the way in which the objectives of the initiative have been expressed is not sufficiently developed so as to facilitate the monitoring and assessment of the performance of the National Teams.

**Table 2.1 "SMART" assessment of the National Teams of Bologna Experts initiative objectives**

"SMART" criteria	Comments	Assessment	
<b>Specific</b>	Are the objectives set Specific enough? (What is the initiative about? why has it been initiated? Who are its stakeholders? Where should it be implemented? Which are the initiative's requirements?)	<u>General objective:</u> The definition of objectives in the call is clear with regard to what the initiative is about and why it was launched. It is also clear regarding the roles and responsibilities of authorities at national level.	
		<u>Specific objectives:</u> The objectives could be clearer in terms of who the end users of the initiative are (e.g. Who should be targeted in HEIs? Are national authorities a target group of the initiative? What about students, employers and other stakeholders?), and what the criteria for the selection of experts should be.	
		<u>Operational objectives:</u> The operational objectives are set out in the list of tasks the Bologna Experts are supposed to carry out. These are clear, although they can be understood in a very minimalistic way (c.f. "measurable" criterion)	
<b>Measurable</b>	The aim is to stress the need for concrete criteria for measuring progress toward the attainment of the objective.	None of the objectives is expressed in a way that makes it measurable (e.g. quantity of events, expected number of participants, as well as element of impacts such as strategy changes or effective implementation of the Bologna reforms at institutional level). This leaves it up to the National Teams to set their priorities and objectives, but makes it more difficult to monitor performance of the initiative at EU level.	
<b>Attainable</b>	This term stresses the importance of goals that are realistic and that can be achieved.	The objectives are realistic, which partly derives from the fact that they are not always measurable and can be understood in a very minimalistic way.	

<sup>13</sup> European Commission (2009) Impact Assessment Guidelines, 15 January 2009. SEC (2009)/92.

<sup>14</sup> See annex 3 for detail about the expected effects of the initiative.

"SMART" criteria	Comments	Assessment
<b>Relevant</b> This stresses the importance of choosing goals that are in line with the strategy the initiative is supposed to serve.	The initiative aims to contribute to the implementation of the Bologna Process and to answer the needs of its stakeholders. It is thus in line with its strategy. However, the concept behind the initiative has not changed much since its beginning, while today's European Higher Education Area is different from the higher education landscape back in 2004.	
<b>Time-bound</b> This last criterion stresses the importance of grounding goals within a time frame and a completion target date	The only time scale given is the one of each specific call. There is no target date a programme level, the existence of the initiative implicitly depending on the implementation status of the Bologna Process.	

Key: Green= "SMART" criteria fully met; Orange="SMART" criteria partially met; Red= "SMART" criteria not met. Source: GHK

The remainder sections of this report examine the inputs given to the initiative, the relevance of its objectives and the degree to which its expected outputs, results and impacts have been achieved.

### 3 Relevance of the National Teams of Bologna Experts

This section presents findings in relation to the relevance of the National Teams of Bologna Experts, this is, the extent to which the objectives of this intervention are pertinent to the need, problems and issues encountered by the initiative's target groups. The section assesses the relevance of the initiative focusing on four different aspects:

- overall relevance of the existence of the initiative;
- the themes it covers;
- its target groups;
- the format of its activities.

These dimensions are considered longitudinally, taken into consideration the situation when the intervention was designed in 2004 and its current context. The assessment also explores the extent to which the objectives of the initiative are likely to be relevant in the future. An assessment of the relevance of the IPHER project is provided separately in section 3.5.

The main sources of information for the assessment of the relevance of the initiative are the three evaluation online surveys and ten case studies. In both cases, stakeholders (including the target groups of the initiative and Bologna Experts themselves), were invited to express their needs and were asked whether the National Teams of Bologna Experts were an appropriate tool to answer those needs. The study team complemented this information with data from the desk research to triangulate results.

#### 3.1 Existence of the Bologna Experts initiative

The relevance of the initiative refers to the extent to which its objectives meet the needs of its target groups. A good source of evidence in this respect is therefore the views of those target groups. **The objectives of the National Teams of Bologna Experts are considered relevant by HEIs (primary target group of the initiative) as well as by national authorities. The awareness raising function of Bologna Experts is perceived as less relevant than their advice function.** In the online survey, respondents were asked to assess the extent to which they found the initiative relevant to the current needs of HEIs in their country. Almost 90% of National Agencies reported this to be the case. More than four fifths of national authorities and almost three quarters of HEI staff reported the initiative to be relevant or very relevant. The figure was four fifths for those HEI staff that had participated in Bologna Expert activities more than once, which shows that the initiative is seen as more relevant by those who are more familiar with it.

Regarding future relevance, almost three quarters of respondents from national authorities and more than three quarters of HEI staff who had participated in at least one activity involving Bologna Experts reported that the initiative would continue to be relevant or very relevant in the future –which is slightly below current relevance in both cases.

The evaluation case studies provided a different view on the relevance of the initiative. A number of interviewees highlighted that general awareness about the Bologna Process is now, ten years on, well established among most HEIs and that the same happens with European programmes. By contrast, case studies show that there is still

a need for advice and support on the implementation of the Bologna Process, for instance in particular in Estonia, Germany, Hungary, Poland, Spain and Turkey. However, this was not the case in Norway.

Moreover, new policy developments, such as the establishment of voluntary peer-learning activities on the Bologna Process would require a re-assessment of the relevance and added value of the initiative –an aspect that is revisited in the final section of this report.

### 3.2 Relevance of the themes covered

**The themes covered by the Bologna Experts initiative are judged as somewhat relevant. However, the relevance of the Bologna specific themes has decreased over time, as the higher education sector itself and the needs of stakeholders have evolved while the initiative’s objectives remained largely the same.**

The first Bologna stocktaking report shows that in 2005 the implementation of the different Bologna priority actions in Europe was mixed -and also rather different to more recent stocktaking exercises. The level of international participation, co-operation and networking in the area of quality assurance was the most problematic aspect of the reform even in its early days (receiving the lowest average score of all 10 aspects of the reform covered in the first stocktaking exercise). However, the scores of individual countries ranged from very low performance (Bulgaria, France, Luxembourg) to very high performance (Belgium (FR), Germany, Finland, Norway, Sweden and UK Scotland).

This shows that a one-size-fits-all approach in supporting the implementation of the reform would not have been appropriate. An initiative in which countries have a common goal (implementation of the higher education reform) but also national priorities depending on the national context was thus reflective of the existence of different stakeholders’ needs at national level. **Yet, the way in which National Teams of Bologna Experts identify stakeholders’ needs at national level is not clear.** While 70% of the Bologna Experts surveyed reported that the strategy of their National Team was in line with the information needs of HEIs some of the case studies revealed that the activities of the National Teams of Bologna Experts were more reactive than strategic or forward looking. This was the case, for instance, in Hungary and Spain. During the case studies, although most interviewees had views about the needs of different national stakeholders, none referred to a team strategy to identify stakeholders’ needs at national level.

Moreover, there is a lack of awareness among Bologna Experts regarding the scope of their activities, beyond the three focus areas of the Bologna Process. There were also mixed views about the relative relevance of the three priority areas (quality assurance, cycle structure and recognition), depending on their implementation status and the national context, but they were overall considered relevant. The implementation of the European Credit Transfer and Accumulation System (ECTS) and Diploma Supplement (DS) and the use of learning outcomes remain a priority in most case study countries. The relevance of European Qualifications Framework (EQF)-related issues depends on the implementation status of the national qualification framework in the case study countries. Although mobility was regularly considered a national priority by stakeholders surveyed and interviewed, it seemed unclear to some experts that promoting Erasmus was/ should be part of the tasks of the National Teams (Norway). This concern is supported by the fact than in most case study countries, there is no clear distinction between the mobility promotion objectives of the LLP agencies and those of the National Teams of Bologna Experts, with a risk of

overlap and confusion for stakeholders. The survey and case study interviews suggested that the Modernisation Agenda for higher education and Youth on the Move Communication are seen as less of a priority by stakeholders. The latter is quite new and unknown in the higher education community, which may explain why it is considered less of a priority than other topics covered by the Bologna Experts initiative. Some interviewees (France, Poland, and United Kingdom) expressed concerns regarding the extension of Bologna Experts' activities beyond the priority themes of the Bologna Process, as it creates confusion for Bologna Experts and their target groups. The evaluation case studies also highlighted a lack of awareness about and focus on activities linked to employability and social dimension issues among Bologna Experts.

**Regarding future needs**, it is clear that internal quality assurance should remain a priority in almost all countries. The online surveys suggest that, on the whole, quality assurance remains the highest priority for HEIs. In the online surveys, when asked about the themes on which Bologna Experts should focus in the next ten years, two thirds of HEI staff surveyed underlined the importance of Recognition and Quality assurance, while the three cycle system was considered a priority by only slightly over one third of the respondents, lower than the figures for mobility and modernisation. This is further supported by data from the last Bologna Stocktaking report (2012) which suggests that progress on the three-cycle degree system and associated measures has been widespread, (except progress on the implementation of national qualification frameworks).

National authorities presented a very different view, considering the three cycle structure as the most important future priority, followed by recognition. This may reflect a need for greater engagement of national authorities with the sector in the articulation of priorities for the initiative. In the case studies, employability was mentioned as a priority area for the future in a number of countries –including Estonia, Spain, Turkey and United Kingdom. Insufficient innovation in teaching methods was also cited as one of the main challenges for higher education systems in the years to come (Portugal and Spain) and one area where Bologna Experts should intervene

### 3.3 Relevance of the identified target groups

The Bologna Experts initiative was conceived as a peer-to-peer exercise, whereby professionals active in higher education advised their colleagues on how best to introduce Bologna reforms<sup>15</sup>, a remit which later widened to encompass objectives related to policy support and advice. **The peer-to-peer design of the National Teams of Bologna Experts initiative has been in line with the needs of its target groups**, according to the survey of LLP National Agencies and case studies.

**Policy makers, however, have shown a lower degree of demand for the expertise of National Teams.** In most case studies, the National Teams of Bologna Experts work closely with the BFUG members, but they reported difficulties to effectively reach the national authorities in charge of the implementation of higher education reforms (France, Germany, Hungary, Norway, Poland and Portugal). This suggests a lower degree of relevance of the initiative for this target group, except in a small number of countries (for instance Scotland). This does not mean that policy-makers do not need support in the implementation of the Bologna Process, but seems to indicate that Bologna Experts are not the appropriate means to meet these needs.

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<sup>15</sup> Restricted Call Addressed to the Socrates-Erasmus National Agencies to submit an Activity Plan and Budget to support the National Teams of Bologna Promoters 2004-2005

**Thus, although coherence between the work of the experts on the grounds and the policy level is crucial to the successful implementation of higher education reforms and the EHEA,** only a very limited number of Bologna Experts activities have targeted decision-makers. Only one third of Bologna Experts consider national authorities as a high priority target group. In the online surveys, around four fifths of national authorities reported that they were planning to use Bologna Experts' assistance in the future or that they were planning to attend promotional and awareness-raising activities in which Bologna Experts might be involved. However, only half indicated they were planning to participate in training activities. The reach of Bologna Experts has been limited to those national authorities that are more directly involved in the implementation of the initiative and higher education organisations, and could only influence policy-making indirectly through those, rather than have direct contact with national decision-makers.

The online surveys indicate that the primary target group of almost all Bologna Experts has been HEI staff. This is partly because Bologna Experts consider that HEIs are, at the end of the day, those institutions which determine the success or otherwise of the implementation of the Bologna Process and the European Higher Education Area. There were, however, different views in the case studies regarding whom Bologna Experts should target within HEIs. Thus, while some respondents mentioned HEI management staff (rectors and vice rectors) others claimed that participating in Bologna Experts' activities may be too time consuming for them. Directors of study for recognition and curriculum development issues and International Officers for mobility were also mentioned. In practice, the right 'level' to target within HEIs is likely to depend on the specific issue to discuss.

**While contact with HEI staff has been frequent, the evaluation revealed that other stakeholders have been targeted only to a very limited extent, even if their involvement is crucial to the success of the Bologna Process.** Thus, in the online surveys, students and national authorities were considered a priority target group by only one third of the Bologna Experts. Experts' engagement with other key stakeholders such as employers and professional organisations, has also been very limited in spite of their importance and their need to better understand recent reforms. By way of illustration, already in 2007, a project on employers' awareness about the Bologna Process reported an "obvious need for targeted information about the Bologna Process for employers"<sup>16</sup>, but this target group has remained a low priority. A recent European wide survey of employers<sup>17</sup> revealed that one in five employers is not fully clear regarding the difference between a bachelor and a master degree. Moreover, only small minority of experts mentioned high schools, secondary school teachers and pupils and their parents (France and Poland), media and the general public (Estonia) as target groups of their National Team. The low profile given to media and the general public is surprising, considering the initial resistance of the public in some countries to Bologna, which could partly be associated with insufficient knowledge of the process. Some teams, such as the German and Polish teams, planned to reinforce their cooperation relations with national media in the future.

### **3.4 Methodology and evaluation questions**

**The current format and balance between types of activities in the initiative is not always responsive to the needs of its target groups.** Thus, HEIs demanded a

<sup>16</sup> Coimbra Group, Raising Employers' Awareness about the Bologna Process, final project report (2007)

<sup>17</sup> European Commission (2010) 'Employers' perceptions of graduate employability. Analytical report Flash Eurobarometer 304' Luxembourg, Office for Official Publications of the European Communities.

greater emphasis on small-group **practical activities** related to implementation aspects (almost three fifths of HEIs respondents who know the initiative favoured this option) **rather than seminar-like activities/** promotional and awareness raising activities focusing on policy aspects of the reform (half respondents who are familiar with the initiative favoured this option). In most case studies the main challenges faced by national higher education systems were linked to the practical implementation of the Bologna Process -i.e. inadequate use of ECTS, evaluation of learning outcomes and recognition of academic and professional qualifications. Greater use of ICT tools, to increase the outreach of the teams as well as the organisation of study visits and activities in small groups, that offer a targeted approach to users were also mentioned as alternatives to the current format of the initiative in case study interviews. In only one case study (Norway) was it reported that the team had focused too much on implementation and practice rather than strategy and policy.

Moreover, some of the promotion and awareness raising activities expected from Bologna Experts are already carried out at national level by other organisations, making it difficult to see a substantive role or added value for Bologna Experts. For instance, LLP National Agencies already promote the lifelong learning programme, and HEIs are familiar with the programme. Many actions promoting mobility under Erasmus are also organised by HEIs. EU information and communication networks such as the Europe Direct Information Centres also carry out activities promoting the participation in EU mobility programmes.

Although there is evidence of some joint work with higher education sector organisations and LLP National Agencies, Bologna Experts could work together with these other information providers more often when it comes to raise awareness and understanding of others stakeholders about the Bologna Process, and focus their own activities on facilitating technical discussions about implementation challenges.

A final way to assess the relevance of Bologna Experts' activities is to check the willingness to take part in those activities amongst the initiative's target group. In the evaluation online surveys, between half and two thirds of HEI staff respondents reported that they are planning to participate in different activities offered by Bologna Experts in the future. Their main area of interest for the future is advice activities. Interest in future participation in the activities of Bologna Experts was, however, higher among those respondents who were *unfamiliar* with the initiative –which made up around one third of the sample of HEI staff. About two thirds of such respondents mentioned that they would like to participate in Bologna Experts' activities. In the online surveys, national authorities also showed willingness to participate in Bologna Expert's activities, with a preference for assistance in policy making and promotional activities (both more than three quarters of respondents). Only half of the national authority respondents were interested to participate in training. This shows that there is no one-size-fits all approach to this initiative, with different types of stakeholders expressing different needs, and aspect that was confirmed in the evaluation case studies.

### 3.5 Relevance of IPHERs

While most activities of the National Teams of Bologna Experts take place at the national level, the objective of the IPHER is to bring a European dimension to the initiative and to give experts the opportunity to meet, interact and learn from each other. **In that sense, IPHERs are considered relevant by experts**, even by those who were more critical of their effectiveness.

**The themes covered by the training seminars are considered in line with the needs of the Experts.** The relevance of most themes covered by IPHER training

seminars was considered high to very high for their country by more than half of the experts who replied to the evaluation survey. This was confirmed in the case studies.

**Bologna Experts were more critical with regards to the relevance of the format and the level of the training seminars.** They reported that discussion groups with smaller numbers of experts would improve the relevance of the training seminars. Although they welcomed the opportunity to meet new colleagues and network, the more experienced Bologna Experts interviewed often found training seminars more adapted to the needs of newcomers. Most experts seemed in favour of a two-level training offer (newcomers/beginner and experienced). Experts would also like to see 'less theory and more practice' in training seminars, involving shorter and more practice-oriented plenary sessions.

In addition to its training seminars, IPHERs offer a web platform called Virtual Community where Bologna Experts can interact. Considering the European dimension of the National Teams, this is a relevant tool for the exchange of information. Finally, the IPHERs' contracts foresee the provision of promotion and information materials for the use of the Bologna Experts. While Experts generally found these relevant they reported that they would welcome ready-made presentations and promotion material/templates that they could tailor, translate and use in their activities at national level.

## 4 Intervention logic

This section presents findings on the extent to which the National Teams of Bologna Experts initiative has achieved its objectives. The main sources of information for this section were the grant applications, assessments, progress reports (as available), final reports and their assessments, and the evaluation online surveys and case studies. For the assessment of the IPHER, a member of the study team participated in a training seminar (as an observer) and examined the seminar documents (information packs and evaluations) as well as the final activity report for the first IPHER. Interviews with DG EAC and the IPHER contractors, complemented with IPHER activity reports, when available, provided a better understanding of the achievements in terms of outputs.

The section covers the effectiveness of the systems for the selection of experts, before it reviews the delivery of Bologna Experts activities (outputs) and their short and long-term effects on the implementation of Higher Education Reforms. The section also reviews the degree of effectiveness in the management of the initiative and of the IPHER projects separately.

### 4.1 Team composition and profile of the experts

**The selection processes for the initiative have resulted in people from a variety of backgrounds being recruited as Bologna Experts. This diversity of profiles has been considered as an asset of the teams. There are, however, some important groups that are underrepresented.** In practice many Bologna Experts are HEI staff, covering public and private Universities as well as Colleges and Universities of Applied Sciences. There is at least one student representative per team -more in some cases. National Teams have also included National and regional authorities officials (for instance in France), members of the national Rectors' Conferences and members of Quality Assurance Agencies. Some teams have also included experts with other profiles, such as employer organisation representatives (Germany) or members of upper secondary schools providing higher education (France) and research centres. Teams have generally found it difficult to attract senior university managers and in some countries even academics (Norway).

**The composition of the Teams has changed over time, with a combination between fluidity and stability in team membership, which has tended to be well balanced.** In the countries covered in the case studies, changes were considered beneficial to the teams (France, Poland, Spain, and United Kingdom). This was particularly the case in "ageing" teams. However, some changes were claimed to have altered the dynamics of the group and have led to the exclusion of high profile experts to the benefit of newcomers, whose expertise level may not always have been sufficient (France). Interviewees also reported difficulties in attracting recognised experts to the National Teams (Spain). The main reasons given were the lack of financial incentives and a perceived lack of prestige of the Bologna Expert function (Poland, Spain).

**Bologna Experts generally have a good degree of knowledge of the Bologna Process.** However, in some case study countries, references to political appointments not fully based on knowledge of Bologna, were made during the evaluation case studies. This partly derives from the existence of a range of different methods for the selection of experts in different countries. Possessing **good communication skills** is another key requirement to be selected as a Bologna Expert. Interviewees in some case study countries raised concerns regarding the communication skills of Bologna

Experts, suggesting that greater importance be given to this criterion in the future, for instance in Germany and Poland.

## 4.2 Outputs

**National Teams of Bologna Experts have tended to deliver their work programme partially. EACEA monitors the initiative and in most cases, the BE receive positive assessments from the Agency in spite of the scarce evidence available to demonstrate concrete impacts.** Failure to carry out expected activities in full has budgetary consequences as the planned budget can be partly recovered in the event of non-or partial implementation. Monitoring reports tend to present a positive image of the quality of National Teams and their activities, which makes it difficult for the experts to provide a critical assessment. A review of external experts' assessment of the final reports submitted upon completion of activities carried out under the 2008 call for those countries covered by the case studies reveals that most National Teams get high scores (70 - 89 = Good or 90 - 100 = Very good) under the categories 'Realisation of the work programme objectives' and 'Activities and outcomes'. However, over the period 2009-2011 participant countries **reached on average a mark of 67% for the realisation of their work programme objectives.** Over **one quarter of the teams obtaining scores of 50% or below,** which partially explains the low average score. A few other countries received a score of 60% whereas all the other countries obtained scores equal to or above 70%. Monitoring reports note occasions in which objectives are changed or not reached, and changes to the work programme not motivated.

**Overall, participants in Bologna Experts activities found them of good quality according to the evaluation surveys.** A majority of respondents found Bologna Experts' activities good to very good. This was the case for more than 70% of the HEIs and national authorities that had participated in Bologna Experts' activities. Most HEIs and national authorities also estimated that Bologna Experts were a good or very good source of information and advice on higher education reform in the areas they cover. The quality of Bologna Experts' activities was confirmed in the evaluation case studies.

When asked to name sources of information that they estimate at least as good as the Bologna Experts, between one fifth and one third of respondents –depending on the theme- provided an answer, in particular for Quality Assurance, mobility and recognition issues, which shows that a relatively large proportion of respondents use alternative sources of high quality information regarding higher education reform. More generally, it is difficult to identify initiatives or organisations that exactly match the remit of Bologna Experts. This evaluation, however, reviewed a recent customer service survey undertaken by NARIC (the UK's LLP National Agency responsible for providing information, advice and expert opinion on vocational, academic and professional skills and qualifications from over 180 countries worldwide) in 2010<sup>18</sup>, in which over 700 NARIC customers reported their views on the service as a reference point. The survey shows that, on the whole, around 80% of users consider NARIC's service between good and excellent, which is **broadly in line with the rating Bologna Experts** obtained in this evaluation's surveys.

It is important to note the existence of a significant gap in the quality of monitoring of outputs. Although the headings of the monitoring reports cover effectiveness questions related to management, outputs, outreach and impacts of the teams' activities, the answers provided in the report rarely gather the evidence needed by the

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<sup>18</sup> NARIC (2010) Customer Survey. NARIC.

external evaluators to assess and challenge the judgements presented in them. Relatively often, the relevance of the content of the section is unclear, suggesting that **greater efforts should be put on the understanding of monitoring reports by LLP National Agencies**. This monitoring issue will be covered in greater detail in the next sub-sections on results and impacts and on management.

### 4.3 Results and impact

A key aspect of any interventions relates to its medium and long-term effects. **Although National Teams are asked to monitor and report on their impact on the implementation of higher education reforms, there is very little evidence on the impact of the initiative.** An assessment of the final activity reports for the period 2009-2011 reveals that 'Contribution to EU policies and impact' is the criterion on which National Teams of Bologna Experts are ranked with a higher average mark (70%), with most countries attaining between 70% and 90%. Only four countries obtained an average of 50% or below in this period, in which 17 National Teams also applied for top-up activities. The assessments of the final reports show that the average scores for top-up projects are slightly higher than those "basic" projects.

In spite of this, the evidence provided in the monitoring reports regarding impact is very scarce. Even when countries reached the highest score (100%) there was little evidence provided or examples of impacts to support the score. Monitoring reports instead tend to concentrate on saying that the team organised the envisaged activities with a view to support the implementation of reforms in specific areas. Assessors also tend to report when the work programme objectives initially described in the applications were attained, that there is evidence of a positive contribution to the implementation of the Bologna Process (positive impact), conflating outputs and impact.

This reveals the limitations of the current reporting system as a source of information tool to assess the impacts of the National Teams of Bologna Experts. Indeed, there seems to have been a general misunderstanding of the definition of 'impact'. The reporting Guidelines of the National Teams of Bologna Experts 2008-2009 refer to the 'Contribution to EU Policies, Impact and Dissemination' as the description of 'how this project has contributed to key EU policies, objectives and priorities (implementation of the Bologna action lines; promotion of a lifelong learning strategy as part of the Lisbon strategy for growth and jobs, priorities set out in the Invitation 2008-2009, etc...) and its short and long-term impact'. However, there is no equivalent definition available in the following calls. In many cases, reports tend to outline the operational achievements of the National Teams of Bologna Experts and/or the implementation of the Bologna Process in their country and **fail to show –or reflect upon– the link between both (causality)**.

**The perception of target groups on the impacts of the National Teams gathered in the evaluation surveys and case studies suggests that impacts are more visible in the institutions that have close links with the experts, although some positive impacts were also reported by other HEIs and national authorities.** In the online surveys, national authorities and HEIs staff who had participated in Bologna Experts' activities were asked about the impacts of different types of activity on their organisation and their country. About three quarters of respondents reported that the impact of the National Teams of Bologna Experts had been positive to highly positive, without major differences per type of activity. Less than one quarter reported the impact to be neutral (no impact). Regarding themes, recognition was reported to be the area where the highest level of impact was achieved, closely followed by quality assurance and the three-cycle system. However,

when asked about the nature of the impact of the initiative in their countries, the responses given by national authorities and HEIs signalled that they are unclear as to what this has been regarding some themes.

Case study interviewees included staff in HEIs that had not directly worked with Bologna Experts, as well as HEIs that had participated in at least one Bologna Expert activity, and members of HEIs where Bologna Experts are/ have been based. This differentiation revealed that the more significant impacts of Bologna Experts tend to be visible mainly in those institutions where they have been based (Portugal). This underlines the positive effects of ensuring the presence of a motivated expert within the institution.

**There is, on the other hand, little visible impact on national reforms.** Some case studies provided examples of important policy developments at national level where Bologna Experts were either not consulted, or not heard (France, Hungary, Portugal and Spain).

**Thus, based on the data available to the evaluators it seems that the impact of the initiative has been modest in relation to its specified objectives. However, a better monitoring system might contribute to identify positive impacts of the initiative.**

#### 4.4 Effectiveness in the communication towards target groups

**In general, National teams have not developed clear communication strategies towards their target groups.** The review of external expert assessment of the final reports submitted upon completion of the activities carried shows that the lowest average score achieved by National Teams relates to the category 'Communication', with an average of 64% for the period 2009-2011. A frequent shortcoming that assessors reported in this area was that the teams lacked pro-activity in the dissemination of information. Case studies showed that few National Teams have a clear communication strategy which would allow them to effectively reach their target audience -for instance a list of Bologna contact points in all HEIs in the country, work with multipliers to disseminate their information beyond core target group (HEIs), a newsletter to inform their target groups of the activities of the Experts and of the latest developments of the Bologna Process (as this is the case in France for instance). A clear area to improve regarding the initiative's communication strategy is the use of ICT. Only two thirds of the case study countries have a web-page about Bologna Experts, and only half provide a link to the list of experts, which makes it more difficult for potential beneficiaries to contact them. Very few websites mentioned current or recent events related to the Bologna Process, e.g. the Ministerial conference in Bucharest in April 2012. ICT tools, on the other hand, have proven useful in the past to complement the activities of the Bologna Experts, and, in extreme cases, to replace them. This was the case in Spain when there was no National Team of Bologna Experts in 2008-2009.

**Within this overall picture, National Teams reached their core target group (HEIs) more effectively than the other groups. The outreach towards national authorities and students is more limited, while other stakeholders such as employers were reached only marginally.** More than 80% of Bologna experts reported in the online surveys that their National Team had reached HEIs very well or well, although there is some room for improvement. For instance, a bit less than one fifth of respondents among HEI staff were familiar with the Bologna Experts initiative but had not participated in any of its activities. When asked why, half said that they had not been informed about these activities. About two thirds of Bologna Experts estimated that their team had reached National Authorities effectively, and less than

half that they had reached students effectively. Less than one third considered that employers had been reached effectively, although they were reported to be a target group of two thirds of the National Teams. Moreover, around one in four experts reported that their team does not target employers at all. Case studies also suggest that reaching target groups beyond HEIs has been challenging. Many interviewees reported difficulties to engage with employers in their country and get them involved in activities linked to the implementation of the Bologna Process (Poland, United Kingdom). This reinforces the conclusions of publications such as “Raising employers’ awareness about the Bologna Process”<sup>19</sup>.

Case study interviewees suggested that communication in relation to the initiative could be improved. While HEIs reported that they are not always well informed about the activities of the Bologna Experts, they also recognised that a certain degree of pro-activity could also be expected from HEI staff in the search for information. Students and other stakeholders were more negative about their interaction with Bologna Experts, and expressed the feeling that they are not considered a target group. Regarding National Authorities, some said they were not always aware of what Bologna Experts do, and vice versa and that mutual communication could be improved.

## 4.5 Effectiveness of the management of the National Teams

This section reviews the degree of effectiveness in the management of National Teams of Bologna Experts at European level and at national level

### 4.5.1 EU Level

At EU level, DG EAC has supervised the initiative since 2004. DG EAC has managed the IPHER contracts since the first IPHER in 2006. Regarding the coordination of the National Teams of Bologna Experts activities, the role of DG EAC has changed since the EACEA started to be involved in the initiative in 2008, as part of the operational management was transferred to the EACEA.

**The transfer of part of the management of the initiative to the EACEA has generally been perceived as an improvement.** In 2009, an interim evaluation of EACEA<sup>20</sup> concluded that the quality of the service provided to programme beneficiaries and stakeholders had improved compared to previous management schemes. Benefits referred to the streamlining and simplification of administrative procedures and the Commission being able to focus on policy and programme development rather than operational management in the new setting. Moreover, the externalisation of programme management to EACEA is estimated to create savings of 20% compared to a situation where the programmes were managed fully within the Commission.

In the online surveys, LLP National Agencies were asked whether they thought the European Commission (before 2008) or the EACEA (after 2008) had contributed to the effectiveness of the initiative. Three quarters of the LLP National Agencies considered that this had been the case. This finding was supported by the case studies, where most LLP National Agencies reported to be satisfied with the current management of the initiative at European level. However, **some interviewees in the case studies claimed that the “content” control operated by the Commission on the selection of experts had disappeared with the transfer of the initiative to the EACEA.** Although the EACEA rectified some nominations, some mentioned that the Commission could have been stricter with “complaisance” nominations, i.e. National

<sup>19</sup> reference

<sup>20</sup> [http://ec.europa.eu/dgs/education\\_culture/evalreports/cross/2009/eaceareport\\_en.pdf](http://ec.europa.eu/dgs/education_culture/evalreports/cross/2009/eaceareport_en.pdf)

Authorities proposing expert roles as a reward to individuals rather than because of their expertise, or National Authorities refusing to nominate experts for personal or political reasons –a point already mentioned above in this report. Some interviewees even suggested that in the future National Authorities should propose Bologna Experts but that the Commission should select those experts that they consider best fit for the job, based on their expertise at European level and on any other consideration that the national authority may have highlighted and that would justify their nomination. Interviewees also criticises that coordination of the initiative at national level led to as many implementation strategies as there are participating countries. They called for more leadership at European level.

#### 4.5.2 National Level

At national level, the calls for National Teams of Bologna Experts detail the respective roles of the National Authorities (Ministries in charge of higher education in the country), LLP National Agencies and Bologna Experts themselves, including the Bologna Experts National Team coordinator, when there is one. Other stakeholders such as the National Rector's Conference are also involved in some tasks (selection and appointment of Bologna Experts since 2007). The matrix below presents the responsibility assignment of these stakeholders, according to the calls for National Teams of Bologna Experts.

**Table A1.1 RASCI table National teams of Bologna Experts (national level)**

Project management phase	Task	National Authority	LLP National Agency
Planning and design	Selection of the Bologna Experts	R	S
Planning and design	Grant application	(A)	R
Planning and design	Activity Plan and budget	A	R
Planning and design	Appointment of the Bologna Experts	R	S
Planning and design	Task distribution within the National Team	A	(R)
Planning and design	Goal setting	R	(S)
Executing	Implementation of the Activity Plan	(A)	R
Monitoring and controlling	Final activity report (before 2007)	R	S
	Final activity report (since 2007)	A	R

Key: R= Responsible; A=Accountable; S=Support; C= Consulted; I=Informed; (A), (R) and (S)=Implicit roles. Source: GHK

This *distribution* of responsibilities has tended to work well, even though there are some aspects of the management of the initiative that could be improved, as already noted –e.g. communication strategy, monitoring- and some aspects where a certain reallocation of responsibilities between the national and European level could be beneficial- e.g. expert selection.

**In practice, management of the initiative varies from country to another, but this has not hampered the functioning of the team in general,** as in the majority of countries, the coordination role is played by one clearly identified person,

based in the team itself, the LLP National Agency or the national authority. This contributes to the effectiveness of the National Team, in particular as it provides a single contact point between the Experts, the LLP National Agency and the national authority and ensures a degree of communication between these stakeholders. Based on the RASCI table National Teams of Bologna Experts at national level presented above the roles and responsibilities at national level should be clear. National variations in the role of the National Authorities, the LLP National Agencies, the experts and other stakeholders vary among countries, as follows:

- In a minority of countries, the national authority plays a greater role than planned in the call, including for instance overall coordination of the National Team (e.g. Spain, Turkey).
- In some countries, the LLP National Agency plays a greater role than specified in the call in the strategy and coordination of the team, playing to some extent the role of the national authority (e.g. Norway).
- In some countries the National Team is quite independent when it comes to establishing its strategy and action plan. In these cases, the LLP National Agency's role is more administrative than managerial (e.g. France, Portugal).
- Some countries give a greater role to stakeholders in the selection of the team (e.g. Norway, United Kingdom).
- The other case study countries (Estonia, Poland, Germany, and Hungary) operate in line with the call.

**In spite of the overall picture presented above it is worthwhile to note that the management structure can affect team effectiveness significantly.** A concrete example was given with reference to the National Team in Portugal, which since 2009 had not been appointed by the national authority, and did not submit a grant application for the period 2011-2013. In these cases, the problem is more related to the lack of support from the national authority to the National Team of Bologna Experts rather than to the role of the national authority in managing the initiative. Lack of formal support from the national authority has been mentioned in a majority of case studies as a barrier to the effectiveness of the National Teams.

In some countries, a National Bologna Follow-Up Group, or equivalent, formally (e.g. in Estonia, Hungary, Poland, UK) or informally (e.g. in Germany) supports the national implementation for the Bologna Process.

## 4.6 Effectiveness of the IPHERs

### 4.6.1 Effectiveness of the training seminars

**Overall, training seminars have reached fewer participants than foreseen. An increasing share of participants have provided feedback on training seminars over time, but such feedback is sometimes still not sufficient to draw clear conclusions and recommendations about their value and how to improve them.** The number of participants (including Bologna Experts and Higher Education Experts in Tempus countries) in the eleven training seminars organised so far under the IPHERs and their overall level of satisfaction with the event are presented in the table below.

**Table 4.1 Quality of the training seminars organised under the IPHERs (2006-2011)**

IPHER	Training seminar		Total number of participants	Response rate	Satisfaction level as expressed in the evaluation forms
I	Training seminar on the Three Cycle System & EQF	Edinburgh, 2006	79	13%	Not quantified
I	Bologna Promoters' Training Seminar on Quality Assurance in Europe	Munich, 2006	114	9%	Not quantified
II	"Universities and Lifelong Learning: Opening Up for the Knowledge Society"	Vienna, 2008	66	71%	77%
II	"European Qualifications Frameworks, Learning Outcomes and Labels for ECTS and Diploma Supplement"	Madrid, 2008	128	46%	77%
II	'Making Mobility Happen'	Rome, 2009	137	35%	70%
II	'Competences for the Future'	Warsaw, 2009	127	48%	84%
III	'Recognition in Higher Education: how to make it work!'	Tallinn, 2010	139	50%	82%
III	'The Social Dimension of Higher Education - Building Excellence and Equity'	Cyprus, 2010	134	30%	88%
III	'Promoting Learning Mobility'	Brussels, 2011	149	87%	80%
III	'Modernisation of Curricula'	Oslo, 2011	131	72%	84%
III	'Enhancing Quality through Internationalisation'	Lisbon, 2011	154	56%	69%

Key: Green= More than 75% satisfied; Orange=Between 50% and 75% satisfied; Red= Less than 50% satisfied. *Source: GHK, EUA, UNICA*

Figures show that the response rates to feedback questionnaires, and reported satisfaction levels have improved through time, reflecting a degree of organisational learning, in particular from 2009, although some of the most recent events (on

enhancing quality through internationalisation) do not seem to have attracted a significant degree of support from respondents.

**Most participants in the training seminars seem to be satisfied by their current format and content.** A large majority of participants also tend to concur that the seminars' documentation and the networking opportunities are of good quality. Between 75% and 90% of participants in the five most recent seminars said that these had considerably contributed to update their knowledge on the seminar topic. More than 90% of participants said that they would use what they have learnt in the seminars in their work at home<sup>21</sup>.

**Results of the evaluation online survey targeting Bologna Experts and LLP National Agencies were somewhat less positive.** Almost three quarters of those Bologna Experts who had participated in at least one training seminar reported that the contribution of the seminar to their activities as Bologna Experts had been high or very high. The remaining quarter said that the contribution had been fair, low or very low.

**Case studies interviewees were much more critical about the training seminars and highlighted a number of areas of concern.** During the evaluation case studies Bologna Experts criticised, first, the fact that they were too theoretical compared to their needs (except for Norway). They would welcome fewer theoretical plenary sessions and more interactive and practical sessions in small groups, as already noted above in this report. *Second*, they recommended the use of Bologna Experts as speakers rather than external speakers – who may on occasions be less familiar than experts with the Bologna Process and experts' needs. *Third*, they criticised the fact that there was a great difference in the level of expertise between experienced Bologna Experts and newcomers and also with Higher Education Reform Experts in Tempus countries. *Finally*, many experts said that they preferred other sources of information, among the most frequently mentioned EUA (website, newsletters and events), ACA (website, newsletters and events) and the EHEA website to training seminars. This could be explained by the fact that most interviewees were experienced Bologna Experts.

**There is evidence of spillover of the training outcomes to those experts who have not or cannot participate, highlighting a wider impact than just the recipients of the training.** Around a third of respondents to the Bologna Experts survey reported that they had never or rarely participated in training seminars. More than half of these said that they are informed of the results of the seminar by colleagues and/or by the LLP National Agency (about one third). Experts also use the Bologna Experts website (event webpage) to get information about seminars in which they are unable to take part in. Around a fifth of experts claimed they are not informed about the seminars in which they do not participate. In the same National Team a variety of situations can occur, whereby some members receive/seek feedback, while others do not.

#### **4.6.2 Effectiveness of the website and interactive working environment for Bologna Experts (IPHER Website and Virtual Community)**

**Although the Virtual Community has been considered a good way to connect with and between experts, only a minority of experts make regular use of it.** Less than three quarters of experts said that they visited the Virtual Community at

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<sup>21</sup> In some questionnaires, this question refers to participant's work "in their university" at home, which could be misleading for those experts who are not HEI staff

least once<sup>22</sup>. The majority of those experts who make use of the Community visit it at least once a month; amongst these only 10% visit it at least once a week. Almost all experts who have ever used the Virtual Community declared that they contribute less than once a month (half of them) or less than once a year (half of them). Reasons for low use of the Community included technical and login problems, preference for other sources and lack of time. This suggests that there is room for improvement in the management of the Virtual Community.

#### **4.6.3 Effectiveness of information material on Higher Education Reform for the Bologna Experts (Seminar readers, ready-made PPTs and other promotion materials)**

An overview of the readers published between 2008 and 2011<sup>23</sup>, including a close assessment of the reader provided to participants in the 2011 training seminar in Lisbon as part of the participant observation exercise for this evaluation shows that they are adapted for their purposes, both in terms of format and content. Monitoring data collected by the IPHER contractors supports this conclusion. The evaluation online survey of Bologna Experts shows that a great majority of participants had used information materials provided under the IPHERs. **Thus, the impact of the training seminar readers extends beyond the participants.**

**The impact of the presentations, on the other hand, is very limited after training seminars.** This is because they are not adapted to the activities of Bologna Experts, which target audiences that are less aware of Higher Education Reform issues, and often require references to the national context.

**The impact of other promotional materials such as brochures and web templates has also been very limited.** In the evaluation online survey, **more than half of those experts who had never or only rarely used the information materials produced by IPHER reported that they were not aware that these materials were even available.** A small percentage of experts declared that the themes covered were not relevant to their needs (15%), or that they had other preferred sources.

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<sup>22</sup> Virtual Community since 2007, virtual working platform between 2005 and 2007

<sup>23</sup> Readers under the first IPHER were not provided, readers from the 2008 IPHER II seminars not accessible online

## 5 Efficiency

Efficiency analyses put in relation inputs and outputs, to examine the extent to which initiatives have achieved their outputs and results at a reasonable cost in terms of the financial and human resources deployed. Ensuring efficiency of the National Team of Bologna Experts implies having them focus on the activities that they are best positioned to carry out, obtaining high outputs and results in relation to inputs. This section first reviews the inputs of the initiative, to then provide an assessment of the extent to which Bologna Expert activities and results have been delivered at a reasonable cost. The section also analyses the efficiency of management and monitoring systems and the efficiency of the IPHER project.

Some caveats should be noted. First, in the analysis of efficiency it is useful to have programme targets to which to refer. As already mentioned in this report, the Bologna Experts initiative did not have quantifiable targets. Second, when making a judgement on the relationship between inputs and outputs, both the volume and quality of the outputs should be considered. Third, while the efficiency of the initiative primarily refers to the relation between inputs and outputs, it also needs to consider its results. Therefore, efficiency considerations are not fully independent from the considerations on relevance and effectiveness provided earlier in this report.

### 5.1 Inputs

**The financial inputs to the initiative** are provided in the Table below. The initiative's EU budget has increased by around 50% from the 2004 call to the 2011 call –slightly less if we take into account an average yearly inflation rate of 2.5%. This is complemented by national co-financing, which has tended to be in the region of an additional 20-30%. The current yearly allocation for the initiative (EU award plus national co-financing) is in the region of EUR 1,200,000 (basic amounts).

**Table 5.1 Overview of the programme by period**

Time period	Number of years (approx.)	Number of countries*	Basic amount					Top up				
			Annual Amount from EC**	Annual Total budget	Co financing rate	Annual max co financing planned**	Annual Amount from EC / Annual max co financing planned	Growth rate of annual amount from EC (period on period)	Number of countries	Annual Amount from EC	Annual Total budget	Co financing rate
2004-2005	1.0	30	904,975	1,267,849	71%	941,261	96%					
2005-2006	1.5	30	1,152,047	1,535,676	75%	1,198,905	96%	+27%				
2007-2008	1.0	31	1,260,679	1,639,593	77%	1,500,000	84%	+9%				
2008-2009	1.0	30	1,060,498	1,388,591	76%	1,704,670	62%	-16%	14	489,228	549,065	89%
2009-2011	2.0	31	1,224,011	1,528,682	80%	1,752,401	70%	+15%	21	675,058	801,116	84%
2011-2013	2.5	32	1,338,608	1,644,966	81%	1,397,702	96%	+9%				
Total	9.0	32	1,195,815	1,531,305	78%	1,440,349	83%		21	613,172	717,176	85%

Source: EC data, GHK calculations

\* grouping BE NL and BE FR only in the total row

\*\* based on the number of months covered by the call

Notes:

1. For the periods 2004-2005, 2005-2006 and 2007-2008, the amounts correspond to those at the application stage. Data are missing in 2004-2005 for BG and PT for both amount from EC and total budget and for IS and MT for total budget. In 2007-2008, data are missing for the following countries: IS, MT, PT, UK and LU.

2. For the periods 2008-2009, 2009-2011 and 2011-2013, the amounts correspond to those at the selection stage. Data are missing in 2011-2013 for PT.

Regarding **allocations of the initiative's budget at the national level**, since 2007 each national grant is composed of a fixed amount, equivalent to EUR 15,000 in 2011, and an allocation based on the student population in the country, ranging, in 2011, from EUR 400 for Luxembourg to EUR 315,700 for the UK. The amount available per country is communicated to the LLP National Agencies when the calls are launched.

In 2008-2009 and 2009-2011, the calls foresaw "top-up" amounts to support projects presenting an "innovative and high quality approach". These represented 40% of the total budget available for the initiative. The indicative amount requested for top-up activities was EUR 120,000 in 2009 and EUR 80,000 in 2008. This aspect of the initiative was not continued in the 2011-2013 call.

The calls also list the **costs that are eligible** under the national projects and specify that the LLP National Agency should make sure that these are not already covered by the Operating Grant that LLP National Agencies receive from the European Union. Since 2008 the calls also list ineligible costs, including indirect costs (overheads). Administrative costs were eligible under the 2004 call. The 2005 call specified that these costs were eligible (flat-rate amount) to a value not exceeding 7% of the eligible direct costs of the country EU allocation. Since then, the LLP National Agencies can additionally budget their staff cost up to either 15% of the total eligible project budget or EUR 10,000 in 2011 (EUR 7,500 in 2009, EUR 12,000 in 2008), whichever is larger.

Calls previous to 2008 did not mention daily **rates for Bologna Experts**. Since 2008, calls have specified that daily rates for the Bologna Experts can be budgeted in some cases:

- when participation of the expert is "of vital importance" for a national or international activity and when this activity was part of the activity plan -the call does not specify what "vital importance" means in this context;
- when related to ECTS/DS label-related activities; and
- when related to the promotion of Erasmus, in particular the Centralised actions.

Since 2008 the EU grant is **managed by the EACEA**, with support from DG EAC. The management costs at EACEA is estimated at 30% FTE of an administrator (Programme Manager) at EACEA and 30%FTE of an administrator (Policy Officer) at DG EAC, both with ad-hoc support for financial management, the organisation of events and assessment of applications and project reports.

**IPHER contracts are funded separately.** The Commission has awarded IPHER contracts following public procurement procedures. The first IPHER contract (awarded 2006) covered a period of 12 months and the second covered 24 months in total from December 2007. Figures for the annual amount awarded to IPHER I are not available, whereas for IPHER II it was 277,000 Euro. The third IPHER was awarded for a period of 48 months in total (from December 2009) and the annual average volume of the contract was in the region of 396,000 Euro.

The IPHER contract is managed by DG EAC (30% FTE of a Policy Officer).

## **5.2 Efficiency of the National Teams of Bologna Experts**

The provision of a judgement on whether the volume of activity delivered by National Teams of Bologna Experts has been in line with the inputs received by the initiative, is

challenged by the lack of an effective system for the monitoring of outputs. However, it can be noted that the efficiency of the initiative from the point of view of the European Union has benefitted from the existence of 'multiplier effects' whereby the EU contribution to the initiative has mobilised additional public and private resources. National resources have co-financed EU investment, and the work of Bologna Experts has largely been pro bono, giving 'staff time' at no fee.

Given that investment in Experts' time is low, the majority of the budget of National Teams goes towards fees, travel costs, administration and actual delivery of activities, such as the preparation of events, which has enabled the initiative to achieve its outputs –to the level that the evaluator has been able to infer these from case study data and the documentation available- at a reasonable cost for the EU. The quality of the activities undertaken, a second aspect to measure efficiency, has also been satisfactory, as already outlined in this report. Moreover, displacement effects of the EU investment seem to have been small. Only 12% of national authorities considered either likely or very likely that the initiative could continue without EU funding under the LLP, whereas two thirds considered this unlikely and a quarter of respondents considered it very unlikely.

It is nevertheless important to note that the response to those who have demanded the services of Bologna Experts could have been more timely as almost one fifth of respondents to the survey of national authorities reported that their queries had not been answered within a month (a further 30% of respondents did not have information on the length to obtain a response). The response from HEI, on the other hand, was much more positive regarding time aspects, with less than 10% of respondents mentioning that their queries to Bologna Experts had not been answered within a month. The quality of responses was judged as satisfactory or very satisfactory by over 70% of respondents in both surveys.

Finally, it should be noted that from the social point of view the staff time devoted to the initiative by experts should still be considered as a 'cost' to these individuals. The concrete volume of such costs depends on the opportunity costs of the time invested. It should also be mentioned that the fact that Bologna Experts' involvement in the initiative is pro bono and not their primary activity can have some detrimental consequences in terms of efficiency –e.g. as experts may not be available to participate in certain activities or not at the time required, causing delays, etc. Nevertheless, most interviewees in our case studies supported the view that Bologna Experts' Teams should continue to be composed by a range of 'part-time' experts rather than by a smaller set of professional experts working full time on the initiative as the link with the higher education world in practice is key in the work of the Bologna Experts.

### **5.3 Efficiency of financial arrangements**

The financial processes for the initiative tend to work well and contribute to its effectiveness, even though some experts highlighted during the evaluation case studies delays in payment for expenses incurred (Portugal). Case study data also revealed that a large majority of national authorities and other stakeholders support the current allocation of funds, based on a fixed amount and a variable amount related to the size of the country (student population). This was, however, identified as a factor hindering the efficiency of the initiative in two case studies (Germany and Norway). Alternatives suggested included the number of HEIs, access to national funding to support the initiative and the geographical size of the country (distance to be covered to visit HEIs).

**The design of current financial arrangements, on the other hand, does not encourage innovative approaches.** Although it may be useful for National Teams to have an indication of the share of the budget which is available per country, the fact that they believe that this amount is “reserved” for them and that they will not get more, should they propose activities that would justify it, does not encourage innovative proposals. **Additionally, top-up activities, which provided additional funding for innovative activities from 2008 to 2011, did not prove more efficient than basic activities.** The opportunity to request top-up funds was not renewed in the 2011-2013 call because its added value did not justify the additional the administrative caused. This is confirmed by the external expert assessment of the final activity reports for basic and top-up amount projects for the period 2009-2011.

#### 5.4 Efficiency of the management and monitoring systems

The most important change in the **management of the initiative** since 2004 has been the delegation of **operational responsibilities to the Executive Agency**, which resulted in efficiency gains. At the national level the size and composition of management teams has tended to be appropriate, in some cases bringing together a good range of key stakeholders in higher education. On the other hand, the efficiency in the management of the **communication and dissemination strategy** at the national level has been limited. There have been failures in making the composition of teams and their expertise transparent to final users, for instance through the use of related websites –as already mentioned in this report.

Finally, **current monitoring system does not allow a full quantification of outputs of the National Teams**, as also mentioned. Moreover, there is no indication that monitoring data has been used to feedback into decision-making regarding the initiative in order to improve its effectiveness and efficiency. National Teams of Bologna Experts activities are summarised in the final activity reports that each LLP National Agency submits to the EACEA at project completion<sup>24</sup>. These reports do not require the provisions of quantitative elements such as the number of events organised or the number of people reached by the events. Therefore, some of these reports do not provide any quantitative information on outputs. This does not mean that relevant information is not collected in some cases. Case studies provided examples of LLP National Agencies that collect information on all relevant activities from Bologna Experts through personal logs that have to be periodically submitted to the LLP Agency detailing the volume and nature of the activities they have undertaken (United Kingdom).

In some cases, comparing the information provided in the final activity reports with information from the application form could bring additional data on the outputs produced, but this is not done systematically. Financial reports have the potential to inform about the number of days worked in the context of the initiative and their average cost (including daily rate, travel and subsistence, LLP National Agency support cost, etc.) per country and at European level. However, they do not allow the calculation of the average costs of a national Bologna seminar per participant, of a site-visit to a University, of pre-selecting a ECTS/DS application, contribution to a policy advice service to a Ministry or a site-visit to a HEI. This makes efficiency assessments challenging.

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<sup>24</sup> Yearly before 2009, biennial since then, with submission of an interim report 12 months after the project started

## 5.5 Efficiency of the IPHERs

**A cost analysis of the IPHERs suggests that the budget is in line with the volume of activities it has delivered, but that efficiency gains could be obtained through a reallocation of funds across budget lines.** The allocation of the IPHERs funds per budget heading is as follows (IPHER II and IPHER III part 1 only).

*Table 5.2 IPHER contract budget – detailed (Dec. 2007 – Dec. 2011)*

Budget heading	Total amount (€)	Yearly average (€)	Percentage of the total
Staff	776,160	194,040	58%
Administrative expenses	94,800	23,700	7%
Travel and subsistence	111,650	27,913	8%
Organisation of conferences	255,550	63,888	19%
Website	66,640	16,660	5%
Hard copy material	41,500	10,375	3%
<i>Total</i>	<i>1,346,300</i>	<i>336,575</i>	<i>100%</i>

Source : UNICA

The previous sections suggested that the Commission should reduce the number of training seminars to one per year and organise additional activities in between. This would contribute to decreasing the cost linked to the organisation of events under the IPHERs, which is in line with the profile of experts, most of which are highly experienced.

Taking this aspect into consideration, participants would be limited to newcomers only. Assuming 1-2 new expert(s) per team per call, events would be limited to 50 participants rather than 150-200. This would reduce the costs linked to the organisation of conferences. These events would still be organised in conjunction with the HERE training seminars targeting experts from Tempus countries.

Additional activities in between training seminars, such as the expert workshops proposed under section 4.6, would imply additional costs, as they are not foreseen in the current IPHER contracts. A way to limit the costs of these seminars would be to align them with other events in which Experts may participate or to have regional workshops. All in all, the organisation of additional workshops would be lower than the gain derived from the reduction of number of training seminars.

**Cost linked to the Virtual Community could also be reduced.** The yearly cost of the website (design and hosting, excluding staff costs linked to the management of the Virtual Community) is EUR 16,660. There has been an increase over the last contract years. The opportunity to use facilities available at the Commission such as Sinapse, which offer the same functionalities, instead of a specific dedicated website should be investigated.

## 6 Conclusions and recommendations

This section summarises the different conclusions and recommendations of this evaluation regarding the evaluation criteria discussed in sections 3-5. The list below should be read in conjunction with the additional information provided in section 7 regarding future scenarios proposed for its future.

### 6.1 Relevance

- The relevance of the initiative should be closely monitored given future developments in the policy context of the initiative, such as the introduction of a new voluntary peer-learning activity on the Bologna Process –see also section 7- to avoid duplication of efforts, and the design of the initiative in the future should be sufficiently flexible to take those into account, in the event of the initiative being continued.
- The needs for the initiative varies substantially by country and target group. This should be better taken into account in the design of the initiative –which for instance currently takes fixed costs and size of the student population as the main criteria for allocation of funds, without sufficiently taking into consideration specific needs.
- Further work would be required to make objectives of the initiative ‘SMART’.
- The target groups defined for the initiative are relevant, but the initiative, given its resources and profile of Experts, has been largely unable to reach target groups outside HEIs appropriately. Thus, it is recommended that the balance between these elements and the objectives of the initiative are reviewed, to keep the scope of Experts’ work realistic. If the initiative is to focus on implementation activities, their main target group should continue to be HEIs.
- The Bologna themes covered by the initiative (Quality Assurance, three-cycle structure and recognition) are still relevant, but better account of the differential progress made in these areas over the last 10 years, as well as different national situations and HEI declared needs is required.
- The activities undertaken in the framework of the initiative vary in their relevance, promotion tasks being less relevant than implementation and advice tasks. Promotion tasks of the Bologna Experts could be carried out by EU information and communication networks, while Bologna Experts could focus on implementation activities. Keeping the promotion of Erasmus as part of the activities of the Bologna Experts can risk duplication of work with other organisations without evidence that the action of the Bologna Experts is more effective than those of other organisations.
- The profile of experts is relevant, but the initiative finds it difficult to recruit certain key groups, such as higher education managers. Increasing the attractiveness to the Bologna Expert function would require an increase in the daily rate they receive and clearer communication regarding their role and the networking and professional development advantages that this position may bring to them.
- Changes in team composition should continue to be managed so as to ensure a balance between the incorporation of new experts and experience, and between areas of expertise.

## 6.2 Effectiveness

### 6.2.1 Impacts

- The effectiveness of the National Teams has differed from a country to another depending on the profile and commitment of national experts, the structure and management of the team at national level, the communication strategy adopted and the political support from the National Authority/ national context amongst other factors. Bologna Experts could therefore focus on those activities that are considered most effective, namely implementation support to HEIs, with a focus on the Bologna priorities, to increase their focus and impact. Thus, the impact of activities linked to themes that are not directly linked to the Bologna Process, such as the Modernisation Agenda or Youth on the Move in particular have been assessed to be lower than for core Bologna themes and has caused confusion amongst target groups and experts. While this may be linked to the fact that these activities are quite recent and still unknown by both the Experts and their target audience, if/ when such themes are included in the remit of Bologna Experts the link with Bologna themes should be carefully outlined.
- To facilitate the work of the Bologna Experts and the achievement of impact in the relation to the objectives of the initiative, the Commission should consider encouraging the nomination of a Bologna contact point for each institution.

### 6.2.2 Management and monitoring

- All National Teams should identify a nominated person who has the coordination role in the country. A certain degree of variation in the management of the initiative at national level should be allowed, but variations should be appropriately justified with reference to the national context.
- Experts' selection processes should be adapted to make it less dependent on the national authorities and ensure that criteria for selection are consistent and consistently applied across countries.
- A higher degree of central quality control in the selection of experts would ensure that risks.
- Improvements in the way outputs, results and impacts are monitored, controlled, measured and reported are required. For instance, calls for applications for National Teams of Bologna Experts should specify in a clearer way what is expected in the monitoring and documentation of these elements. Reporting guidelines should also better specify what is expected in terms of monitoring and impact. This should include the specification of indicators such as the number of events, expected number of participants per event, number of brochures disseminated, number of HEI reached through newsletters or equivalent means, number of queries answered by Experts or the documentation of impacts such as strategy changes or effective implementation of Bologna reforms, including robust reflections on causality chains. Monitoring indicators per country should be sensitive to the variations in work programmes of each National Team. This should also be emphasized in the reporting guidelines in order to make sure that activity reports provide the information evaluators need to assess the impacts of the initiative. This being said, the monitoring system needs to remain user friendly in order to be

perceived as a management tool rather than an additional burden by those who will use it.

- The provisions of support regarding monitoring activities could also be an additional task under the IPHERs, targeting both the LLP National Agencies and the Bologna Experts themselves.

### **6.2.3 IPHERs**

- The IPHER (current format) should mainly target newcomers among Bologna Experts or those that want to learn more about aspects of the reform on which they are not experts. These training seminars should be organised at the beginning of each Bologna Experts cycle and be repeated no more than once a year. Experienced experts could have a more active role in the facilitation of these seminars, to share their expertise and knowledge with newcomers. Training seminars should also cover soft aspects of the Bologna Experts role, such communication and presentations skills, as well as how to monitor the performance and impact.
- The IPHER could also organise highly specialised workshops on technical aspects of the Bologna Process, for instance making greater use of case studies and exemplars that could be circulated prior to meetings and discussed during the event, taking into account the national context.
- Each National Team should present a mechanism to ensure dissemination of the training seminars outcomes to all national experts in order to maximise their impact on National Teams. This could be required in the grant application and assessed in the final reports.

## **6.3 Efficiency**

- The outputs produced by the initiative appear to be in line with the resources allocated to it, displacements effects have been low and multiplier effects have been achieved through the EU intervention. However, the Commission should study the possibility of introducing more flexible and performance based budgetary allocations to countries, rewarding those proposals that present innovative approaches and limiting the contribution to those that simply propose carrying out activities with limited EU added value.
- Payment should be conditional to provision of evidence of appropriate performance –see also recommendations on monitoring.
- The Commission and Executive Agency should support monitoring activities at national level, and analyse monitoring data regularly to steer the initiative and ensure its continuing efficiency.
- Regarding support to Experts, budgetary allocations should be shifted to activities where effectiveness is perceived to be highest, i.e. training seminars for newcomer experts. To ensure efficiency of the IPHER, these contracts should also propose activities for which Bologna Experts have expressed an interest, such as workshops for experienced experts and ready-to-use materials.
- Rationalisation regarding the costs linked to the website/ virtual community should be explored.

## 7 The future of the initiative

Detailed recommendations have been offered regarding different evaluation criteria in the previous section. This section concentrates on outlining a range of options for the future. The section focuses on the initiative as a whole, as the IPHER project can be considered as a tool to facilitate the achievement of the objectives of the National Teams. Based on the findings and conclusions summarised in the previous section a range of potential scenarios for the future could be outlined:

- Discontinuation of the initiative;
- No change/ marginal to the National Teams of Bologna Experts;
- Refocused National Teams of Bologna Experts;
- European Network of Bologna Experts; and
- Supporting structure to peer learning and reviewing activities.

Some of these scenarios are not mutually exclusive. For instance, scenario 5 could be independent or complementary to scenarios 2, 3 or 4 -i.e. it would be possible to go for both scenarios 2, 3 or 4 and scenario 5 at the same time. Initial ideas in relation to these different scenarios –which assume that a large budgetary increase for the initiative would not be possible- are presented below for heuristic purposes. The text does, naturally, not aim to set the terms of neither to substitute a potential ex-ante assessment for the future of the initiative.

### **Scenario 1: No initiative**

This scenario would entail the suppression of the initiative at the end of the Lifelong Learning Programme. This would mean that the additional support to the implementation of the Bologna Process derived from the initiative would be removed. Support to the implementation of the Bologna Process and other higher education initiatives would depend on other international initiatives (e.g. EU programmes and agendas; initiatives by higher education stakeholders at European level; new voluntary peer-learning activities on the Bologna Process) and initiatives at national level led by the ministries or other institutions, who would nevertheless be able to build on the knowledge, experience and networks created by the National Teams of Bologna Experts.

This would risk accentuating divergences in the support to the Bologna Process that is currently available in different European countries, depending on the commitment of national stakeholders, including HEIs –e.g. to provide funding for the activities currently funded by Bologna Experts- and of Bologna Experts themselves –e.g. to continue providing support and advice pro-bono without the Bologna Expert recognition label. The volume of this risk would nevertheless be acceptable, if we take into account the nature of the results and impact identified in this evaluation. Choosing this scenario, however, could also be perceived as a statement that the implementation of the Bologna Process has been achieved with the launch of the European Higher Education Area, which is considered to be incorrect by the large majority of stakeholders. There would therefore be a need to frame the discontinuation of the initiative in an appropriate way in order to avoid misunderstanding by different stakeholders.

The Commission could continue co-funding initiatives to support the better implementation of the Bologna Process, for instance under a format similar to the

Calls for Proposals on Higher Education Reforms (Lisbon Strategy and Bologna Process) launched in 2004 and 2005 under the SOCRATES programme.

**Scenario 2: National Teams of Bologna Experts (no change)**

Under this scenario, National Teams of Bologna Experts would continue functioning under their current format and objectives after 2013. This would generate limited impact and would face limitations as described in detail in this evaluation (e.g. the current structure of the initiative does not sufficiently reflect the fact that the higher education landscape changed significantly between 2004 and 2012, that the needs of the higher education stakeholders have evolved from promotion and information needs to technical assistance and support to implementation or that the initiative is not well designed to achieve policy impact or reach civil society stakeholders).

**Scenario 3: National Teams of Bologna Experts (adapted concept) and European Higher Education Area projects**

Under this scenario, the current organisational structure of the initiative would be maintained but the initiative would focus on the objectives and results that have yielded greater effectiveness and efficiency levels. Thus, individual National Teams of Bologna Experts would still be **managed at national level** and the initiative as a whole would be managed at EU level by DG EAC/ EACEA. In terms of composition of the teams, National Teams would gather representatives of the target groups that are relevant to the priorities of the country. In terms of objectives, National Teams would be able to select a **small number of national strategic priorities**, linked to the implementation of the Bologna Process and those would be mentioned in the proposal (problem identification, strategy to overcome this issue and proposed activities and monitoring plan). Themes covered should be in line with the Bologna Work Programme. The inclusion of European Union initiatives and programmes in the field of higher education would be limited to cases where the synergies with the activities of the Bologna Experts are clear (e.g. some aspects of the Communication on Modernisation of Higher Education) and when there is no duplication with the activities covered by the Operating Grant to the LLP National Agencies (e.g. for the promotion of the new 'Erasmus for all' programme).

In terms of their operational objectives, Bologna Experts should focus on **implementation** activities and support. These activities should mainly take the form of site visits to **HEIs** and workshops bringing together a small number of HEI staff to focus on practical implementation activities. Policy advice would not be an integral part of the initiative, as impact in this area has been very limited in the past, and promotion activities have been less relevant. However, National Teams could still decide to allocate national funds (as part of the national contribution to the project) dedicated to policy advice to national authorities. **The training** provided to Bologna Experts would be better adapted to their needs, level of expertise and experience (differentiating training seminars for newcomers and hands-on training activities for more experienced experts). Bologna Experts could be organised in **working groups** depending on their area of expertise or the strategic priorities they are working on. These working groups could be the object of **additional transnational projects** to cover twinning activities (two teams working together on a specific topics or broader multilateral projects).

The **virtual community** would continue to support the work of Bologna Experts and would provide access to working documents, working group web-pages, etc., but would also clearly distinguish between the working environment of the current

Bologna Experts (accessible to BFUG members and LLP National Agency representatives too), and an external part accessible to all interested parties.

**Monitoring systems** would be significantly improved. Such a monitoring system should include quantitative data about the number of outputs produced (number of events, number of people reached, number of brochures disseminated, number of HEIs reached by the newsletter, etc.). Even if this collection of quantitative data has its limitations (different understanding and application from an agency to another, subjective character of some estimates, etc.) it has proved useful in the evaluation of information and communication networks. EU support would be conditional to the provision of monitoring data that would enable evaluating their effectiveness and efficiency of the initiative at national level in a more reliable way.

The selection of Experts would also be reinforced with a **greater monitoring role of the European level** (EACEA and Commission) on the approval of the selection of the experts as well as activity reports.

#### **Scenario 4: European Network of Bologna Experts**

Under this scenario, the management and delivery structures of the Bologna Experts would change as would the nature of the initiative, to enhance its European character. There would also be a greater direct role for HEIs and a more limited role for LLP National Agencies. Experts would be **selected at European level** (e.g. no 'National Teams' as such) based on their experience and thematic knowledge of the higher education area issues in their expertise domain. The profile of all selected experts would be made available online (either hosted on the EHEA website or on the external page of the Bologna Experts website) for open consultation. HEIs interested in the services of the Bologna Experts could contact experts directly, previous specification of the task to be undertaken. As a condition to be included in the centralised repository of Experts, and to be able to make use of it, experts and HEIs would contribute to the monitoring of activities, by detailing the nature of their engagement, the quality of the service provided (user feedback, which in turn could be used by other institutions to select an expert in a particular theme) and its impact.

This 'brokerage' role could be complemented or not with direct financing, whereby if an institution would like the **initiative's budget to cover the costs** (daily rate, travel and subsistence) **of a Bologna related activity that makes use of a Bologna Expert** they could respond to a much simplified call for proposals (request for services), to be managed by **single contact point** in each country, or at central level by the Executive Agency. Given savings in other areas, the amount available for this call could finance a relatively large number of 'advice' or 'support' days. If the single contact point role is played by the LLP National Agency, it should be covered under its operating grant. Given the limited role of the LLP National Agencies, this scenario should include a **communication and information campaign** towards HEIs, in order to ensure that they are aware of the opportunity given to work with Bologna Experts and how to proceed to benefit from their services. This Communication campaign could be part of the activities under the IPHER.

The **support services** to Bologna Experts (reduced number of face-to-face training seminars, complemented by training provided through the of ICT and the virtual community, etc.) presented under scenario 3 would be part of this option (e.g. the virtual community would be open to all interested parties, its capacity as a knowledge management system would be improved).

The opportunity for Experts to bid for **additional transnational projects** could also be implemented under scenario 4.

**Scenario 5: Bologna experts as supporters of peer learning and reviewing activities (BFUG)**

The evaluation findings suggest that the areas of greater impact of the initiative are those related to the provision of advice and development activities to HEIs. Of course, this does not mean that there is no need to support the implementation of the Bologna Process among national authorities, but rather that Bologna Experts may not be the best instrument to meet these needs. This is partly because Experts have found difficult access to policy-makers. The establishment of peer learning and reviewing activities may provide a platform to address this gap.

The need to support national authorities has been underlined during the Bologna Ministerial meeting in Bucharest in April 2012. The Bucharest Communiqué thus proposed the development and piloting of a voluntary peer learning and reviewing system. Using peer learning activities in the context of intergovernmental processes such as Bologna or in the context of the Open Method of Coordination has proven beneficial in many cases.

Synergies between the Bologna Experts initiative and the new peer learning and reviewing activities could be created. This could operate through the organisation of thematic peer learning activities that involve both national authorities and a selection of Bologna Experts specialised in the theme in question, for instance to act as a 'sounding board' for new initiatives/ upcoming developments. This could also mean the involvement of Bologna Experts in peer reviews, as external experts in support of reviewer teams, when their expertise justifies it. Experts outside the Bologna Experts teams, however, could also take-up such a role, as the experience in peer learning activities in other areas suggests.

Bologna experts would also 'translate' the results of peer learning activities to HEIs – as it has been documented that there can often be a 'break in chain' from similar peer-learning activities and national implementation. This could build on their track as providers of support and advice to HEIs. Greater advantages would be derived in this respect if participants in the peer learning and reviewing activities are national policy-makers rather than exclusively BFUG members, as both groups are not necessarily connected in all countries. To fulfil this task Bologna Experts should be engaged with these new activities and required to closely follow their results.

Such supporting roles to the peer learning activities could be the exclusive remit of Bologna Experts –which would in several respects amount to a discontinuation of the current initiative given the changes in objectives, target groups and expected impacts that would result from such change of focus-, or could be included in a wider remit. Thus, scenario 5 would be compatible with previous scenarios 2, 3 and 4 –in which it was not foreseen that national authorities could request policy advice services from Bologna Experts, under the terms of the Bologna Experts initiative- adding a policy-support role for experts, but within a much more structured platform which would give them greater impact on policy-making. Similarly, options 3 and 4, as presented above, could be implemented without establishing strong links between Bologna Experts and the new peer learning and reviewing activities. In this situation, Bologna Experts (essentially HEI staff) would provide operational advice to HEIs, while peer learning and reviewing activities would focus on strategic issues, target national authorities and would largely be performed by peers (BFUG). At least some degree of communication between these two different levels, however, would be required should this option be adopted.

The proposed scenarios are summarised in Table 7.1 below:

**Table 7.1 Overview of the options proposed for the future of the Bologna Experts**

<b>Criteria</b>	<b>Scenario 1 - No initiative</b>	<b>Scenario 2 – no change</b>	<b>Scenario 3 – Refocused National Teams</b>	<b>Scenario 4 – European Network</b>	<b>Scenario 5 – Peer learning and reviewing (BFUG)</b>
Strategic objectives	National only	National and international	More transnational than national	Almost exclusively transnational	Transnational
Dependence from national authorities	Very high	High	Medium	Low	High
Transnational dimension	Very low	Medium	Medium	Very high	Very high
Operational objectives	NA	Implementation, policy, promotion and training	Implementation (site visits and workshops) and training only		Peer learning and reviewing
Target groups	NA	HEIs, national authorities, students and other stakeholders (employers, civil society)	HEIs and other stakeholders depending on the national strategy	HEIs (other stakeholders upon request)	National Authorities (beyond BFUG)
Support to Bologna Experts	NA	Joint training seminars for all experts, virtual community, promotional material	Training for newcomers, workshops for experienced experts, virtual community, practical implementation material		Support to the organisation (strategic and operational) of peer learning activities could be provided
Management level	Organisation and management structure	More national than European	More European than national	Largely European	European
National Contact Point	NA	LLP National Agency or Team coordinator or, in some cases, National Authority or other organisation	LLP National Agency or Team coordinator, or, in some cases, or other organisation		BFUG

Criteria	Scenario 1 - No initiative	Scenario 2 – no change	Scenario 3 – Refocused National Teams	Scenario 4 – European Network	Scenario 5 – Peer learning and reviewing (BFUG)
Costs (compared to current annual average of around EUR 1,500,000)	NA	=	= No decrease foreseen under this scenario, but a shift to increase the efficiency of the initiative	- This scenario could represent an opportunity to better control the costs of the initiative and to ensure its efficiency / reduce costs	+ Additional to one of the other scenarios. National contribution to this initiative could reasonably be requested for this activity (voluntary basis). Coordination costs could be covered by savings linked to the selection of scenario 4.
Grant structure	Cost structure	Basic amount	Basic amount + additional transnational projects	Activity-related costs reimbursed + additional transnational projects	NA
Co-financing	NA	90% maximum + national contribution	90% maximum + national contribution	90% (?) maximum + institutional contribution OR 100% (call for tender)	Coordination costs could be covered at European level, while country participation in a peer learning and review would be entirely covered by the participating country

Source: GHK

The choice of scenario should take into consideration the potential of the initiative in the new higher education context as well as the place of the initiative in the proposed Erasmus for All programme and Europe 2020, so that it is aligned to the objectives and expected outputs of these initiatives.

## Annexes

## Case study report summaries

### A1.1 Estonia

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	3-5 Experts
<b>Composition of the team</b>	Small team (small size of the higher education community), with varied profiles, all recognised as experts nationally and internationally	<b>Priority themes</b>	All topics covered: Recognition (ECTS, DS), three cycle system, mobility, QA, and recently Modernisation of higher education and Youth on the Move. The team has annual priorities, depending on the national context and needs.
<b>Format of the activities</b>	Flexibility of the format, depending on the expert: Events (seminars, conferences, training sessions) and personalised advice	<b>Target group</b>	Mainly HEIs, with a focus on public universities. The team also targets other stakeholders but would like to emphasize their work with employers in the future.
<b>Management (national level) and monitoring</b>	Mainly National Agency Existence of a Bologna National Steering Committee	<b>Funding scheme</b>	Grant supplemented with national funding and European Social Fund
<b>IPHER</b>	Relevant and effective, in particular for newcomers Specialisation needed to better attract experienced Bologna Experts		
<b>Impacts</b>	The team provided examples of how Bologna Experts have facilitated the implementation of Bologna in the country (e.g. three cycle system)		
<b>Future of the initiative</b>	Larger team, focus on employers as a target group, performance-based funding, better communication strategy at national level to increase visibility		

### A1.2 France

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	14-19
<b>Composition of the team</b>	Enlarged scope in the last years, including representatives of short cycle providers, but the team is not considered representing of the French HE landscape.	<b>Priority themes</b>	Recognition (ECTS and DS), learning outcomes. Concerns about the extension of the BE activities to themes such as modernisation and Youth on the Move
<b>Format of the activities</b>	Both pedagogical and counselling format of activities are needed	<b>Target group</b>	Mainly higher education institutions
<b>Management (national level) and monitoring</b>	Bologna Experts themselves at strategic level, with administrative support from the national Agency Lack of clarity about the management role of the national agency, national authority and Experts	<b>Funding scheme</b>	Funding adequate to the objectives of the National team
<b>IPHER</b>	IPHER activities are appropriate and effective for newcomers in the team of Bologna Experts, but less relevant for experienced Bologna Experts under the current format		
<b>Impacts</b>	Some examples of impacts on the implementation of recognition-related reforms The lack of visibility of the team hampers measurement of its impacts		
<b>Future of the initiative</b>	Better target the national authority and employers, clarify the respective role of the national agency and the national authority should be clarified, improve visibility of the team and its activities		

### A1.3 Germany

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	15-18
<b>Composition of the team</b>	Number of experts not adequate to the objectives, lack of links with the academic world, experts work as individuals rather than as a team	<b>Priority themes</b>	Mainly recognition (ECTS, learning outcomes, etc.)
<b>Format of the activities</b>	Mainly 'grass root' activities,	<b>Target group</b>	Varied range of stakeholders, with a focus on HEI (professors) No focus on policy makers, as use other sources of information
<b>Management (national level)</b>	Mainly National Agency Existence of a National Bologna Committees	<b>Funding scheme</b>	Most coordination costs covered by the LLP Agency
<b>IPHER</b>	IPHER seminars not adapted to the needs of the Bologna Experts (themes, format, level), therefore German experts' interest to participate and contribute is low.		
<b>Impacts</b>	Bologna Experts contribute to 'fine tune' the reform implementation, rather than making a real change. At system level, there is no real impact because of the political nature of the debate, rather a contribution to mainstreaming opinion on the Bologna process in the country. At institutional level, there is no evidence of impact, rather a feeling that Bologna Experts contributed to raise the discussion about Bologna Examples of acknowledged impacts at institutional level and national policy level. The Bologna Expert function has little added value to the impacts of the activities of the experts (e.g. they are invited to events as experts on a specific topic rather than as Bologna Experts)		
<b>Future of the initiative</b>	More high level activities (vs. 'grass root'), more specialised IPHER seminars, better communication and policy support to the team an national level		

### A1.4 Hungary

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	3-14
<b>Composition of the team</b>	Varied profiles (HEI management staff, academics, students, other stakeholders and also representatives of national authority (Ministry of national resources)	<b>Priority themes</b>	Mobility (current and future priority), Quality assurance (current priority)
<b>Format of the activities</b>	Participation of the experts in meeting organised by other stakeholders (mainly the National Agency), contribution to publications produced by these stakeholders	<b>Target group</b>	Decision makers, HEI staff, accreditation bodies, students
<b>Management (national level) and monitoring</b>	Lack of support from the national authority to the objectives and activities of the Bologna Experts Existence of a National Bologna Committee	<b>Funding scheme</b>	The current funding scheme fails to take into account regional differences in student mobility
<b>IPHER</b>	IPHER training seminars are suitable for new Experts but not for experienced members of the national team. Content and level of expertise of the seminars is not adapted to the initiative.		
<b>Impacts</b>	There is confusion around the outcomes and impacts of activities of the National Agency and those of the Bologna Experts. The only impact of the team would be awareness raising among students and HEI (academic) staff Impacts in terms of awareness raising and perception of the reform in the general public and higher education stakeholders, with the exception of policy-makers		
<b>Future of the initiative</b>	Result-based grants National teams of Bologna Experts, more political support to the National Team and its activities would be needed		

## A1.5 Norway

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	5-7
<b>Composition of the team</b>	Nomination by the rector's Conference, difficulties to attract academics.	<b>Priority themes</b>	Recognition is the priority theme Mobility issues are considered important but less relevant to the initiative
<b>Format of the activities</b>	Mainly organisation of and participation in seminars – the counselling and advice activity being less popular in Norway	<b>Target group</b>	The National team has focused on advising HEIs (proactively) and other stakeholders (reactively). Difficulties to reach the National Authority
<b>Management (national level) and monitoring</b>	Mainly National Agency, the National Authority being less involved than foreseen in the call	<b>Funding scheme</b>	The fact that funding per country is calculated per number of students is not advantageous for vast countries like Norway, with high travel costs to visit HEIs.
<b>IPHER</b>	Level not always adapted to the Experts.		
<b>Impacts</b>	Impact hampered by the lack of communication about the activities of the National Team of Bologna Experts (outreach and attribution).		
<b>Future of the initiative</b>	Focus on cross country peer learning and good practice (within Bologna and beyond), funding taking into account dimensions such as geography of the country, clustered (countries, per implementation status and experts, per expertise level) IPHER training seminars, target academic and management staff and students, better representativeness of the target groups in the teams, better communication about and visibility of the team		

## A1.6 Poland

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	11-23
<b>Composition of the team</b>	Expertise, commitment and communication skills vary greatly from an expert to another, team not entirely representative of the national higher education system, lack of prestige and financial incentives linked to the function	<b>Priority themes</b>	Three-cycle system, recognition (ECTS and DS, learning outcomes, recently implementation of the EQF) and quality assurance,
<b>Format of the activities</b>	Mainly advice to HEIs and organisation of training seminars	<b>Target group</b>	<ul style="list-style-type: none"> <li>▪ HEI staff, with a priority on management staff, students and upper secondary schools</li> <li>▪ Although targeted, difficulties to reach national authorities, HEIs operating in regulated professions, academics, employers, local authorities and NGOs</li> <li>▪ Media and general public in the future</li> </ul>
<b>Management (national level) and monitoring</b>	Effective, even if lack of strategic leadership Existence of a National Council for the Bologna Process	<b>Funding scheme</b>	Funding per country adequate, but not sufficient to meet the wide objectives of the initiative
<b>IPHER</b>	IPHERs adapted to new experts, less added value for experience Bologna Experts		
<b>Impacts</b>	Impacts of activities to which Bologna Experts have contributed, but 'attributability' difficult to establish		
<b>Future of the initiative</b>	Wider target group, strengthening the team (number and funding) to increase the scope of their activities and their outreach, differentiated IPHER activities (per expertise level), more cross country activities		

## A1.7 Portugal

<b>National Teams</b>	2004 to 2010 – no team since 2010	<b>Number of Experts</b>	4 to 7
<b>Composition of the team</b>	Professionals from the academic sector. Need to be gather more diversified profiles in the future (e.g. International Relation Office staff). Need to regularly renew the NTBE.	<b>Priority themes</b>	Quality; Recognition (DS and three cycle system) Innovation in teaching methods
<b>Format of the activities</b>	Seminars. Considered useful in raising awareness. However, the NTBE need to be more proactive, visiting HEIs and offering them consultation services.	<b>Target group</b>	Mainly HEIs. Employers and students (for the DS) are possible target groups for the future. Need to raise awareness among teachers (especially on recognition issues).
<b>Management (national level)</b>	Negative remarks regarding the selection process: need to give a greater role to the EU level (as previously when DG EAC was in charge of the initiative) in the selection/ nomination of experts.	<b>Funding scheme</b>	The funding scheme doesn't take into account the effort needed to implement the reform.
<b>Impacts</b>	Difficult to link implementation of the reforms to the NTBE, lack of visibility of the initiative. No example of concrete impact apart from awareness-raising was provided. Absence of effective monitoring. Negative impact of not having a team: problems for the assessment of the applications for the ECTS/DS label. Small number of experts for the whole country might have hindered the effectiveness. Difficulties to reach the National Authority effectively		
<b>IPHER</b>	Benefits limited for experienced experts.		
<b>Future of the initiative</b>	The priority for Portugal is to keep the activities of the Bologna Experts going without the formal nomination of the team, and to have a team formally appointed in 2013.		

## A1.8 Spain

<b>National Teams</b>	2004-2013, with the exception of 2008	<b>Number of Experts</b>	11-18
<b>Composition of the team</b>	Team spirit among team members is crucial Changes in the composition of the team perceived as beneficial to the team, except loss of some key experts	<b>Priority themes</b>	Employability Innovation in teaching methods
<b>Format of the activities</b>	Team more reactive than proactive in the last few year	<b>Target group</b>	Universities Employers to a lesser extent (need to speak their own language National authorities but not always effectively reached
<b>Management (national level) and monitoring</b>	National Authority, supported by the National Agency for financial management	<b>Funding scheme</b>	Issues linked to the bureaucratisation of the programme and the facts that financial management and coordination of the initiative are separated in Spain
<b>IPHER</b>	Gap between the level of the experts of the level of the training seminars, the current format does not allow enough interaction among participants		
<b>Impacts</b>	Positive contribution to the implementation of the Bologna action lines, with examples of impacts at institutional and policy level, but impact hampered by the lack of visibility of the experts		
<b>Future of the initiative</b>	Multinational teams and activities, more visibility, better dissemination of good practice cross country, wider target groups including employers, etc.		

## A1.9 Turkey

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	8-16
<b>Composition of the team</b>	The team represents higher education stakeholders, except the business community. Commitment and quality of the work of BE vary from an expert to another.	<b>Priority themes</b>	QA, recognition (ECTS, DS, learning outcomes and EQF) Employability
<b>Format of the activities</b>	Mainly regional meetings with the Bologna Coordination Committee and heads of HEIs, advice provided upon request (no site visits)	<b>Target group</b>	HEIs (management, academic, and administrative staff), students, national authorities, national bodies in charge of mobility and qualifications and other organisation
<b>Management (national level) and monitoring</b>	Mainly National Authority Existence of a Bologna Coordination Committee	<b>Funding scheme</b>	Considered adequate
<b>IPHER</b>	Level of the IPHER training seminars vary from a seminar to another, thus relevance varies for experienced/less experienced experts		
<b>Impacts</b>	Impacts on the implementation of ECTS and DS in the country and in the development of the NQF, but attribution difficult to establish		
<b>Future of the initiative</b>	Need to improve cooperation with national body in charge of qualifications, employers and NGOs		

## A1.10 United Kingdom

<b>National Teams</b>	2004-2013	<b>Number of Experts</b>	8-15
<b>Composition of the team</b>	BE appointment process involving HE stakeholders Adequate composition, good communication skills Performance monitored, with consequences on future nomination	<b>Priority themes</b>	QA and recognition (ECTS and DS to a lesser extent) Employability Mixed-views about modernisation-related issues
<b>Format of the activities</b>	Site visits, regional seminars, international activities involving Bologna Experts from other national teams	<b>Target group</b>	HEIs and students to a lesser extent Employers difficult to reach
<b>Management (national level) and monitoring</b>	National Agency Existence of a National and regional Bologna Committee Activities of the experts constantly monitored, with consequences on their future nomination	<b>Funding scheme</b>	Adequate funding, appropriate distribution criteria
<b>IPHER</b>	Training seminars contributed to networking and good practice exchange		
<b>Impacts</b>	Little evidence of impact at system or institutional level, but room for impacts limited in the UK due to the national context and higher education system		
<b>Future of the initiative</b>	Role of the Bologna Experts in clarifying the links between the Bologna Process and EU2020, more cross country activities and support to other national teams,		

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