

PERIODIC PROGRESS REPORT (18 MONTHS)

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Project nr: SETN-2000-00001

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton (ROEI.DSC)

Partners: Society for Research into Higher Education, UK (SRHE)
Centre for Higher Education Studies (CHESCZ), Prague, Czech Republic
Vytautas Magnus University (UMAGN.FSS.CVER), Kaunas, Lithuania
Bureau for Educational Services (BESBG), Sofia, Bulgaria
National and Kapodistrian University of Athens (UAT.PSY), Athens, Greece
Kungliga Tekniska Hoegskolan (RIT.LL), Stockholm, Sweden
Johannes Kepler Universitaet Linz (ULINZ.ISUSS), Linz, Austria
Universiteit Leiden (RUL.SW.LO.ESREA), Leiden, Netherlands
Continuing Education Development Foundation (CEDEF), Riga, Latvia
Jagellonian University (UJAG.FC), Krakow, Poland

Project's
www: www.HEReform.Net

Reference period: from 1 Nov 2003 to 30 Apr 2004

Starting date: 1 Nov 2001 Duration: 36 months

Date of issue
of this report: 30 April 2004

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SCIENTIFIC REPORT

1. Scientific overview

The HERN project involves 11 partner organisations in 10 countries (UK, Austria, the Netherlands, Greece, Sweden, Poland, Lithuania, Latvia, Czech Republic and Bulgaria). The project began on 1 November 2001 and will continue for three years. The project comprises 13 workpackages; 11 have scientific objectives, one is concerned with establishing the operating framework and one with the management of the project. Eight of the planned nine seminars have been held, the Disability research group is completing its conclusions and planning has been completed for the final seminar in June. Only six months of the project remain in which much remains to be done to draw together all the elements into a cogent policy document. This report is concerned with months 25 to 30.

The overall purpose of the network is to explore the differential values underlying strategies for HE reform by addressing the question: "What is the relationship between HE and society in a world of change?", with particular reference to:

- structural changes taking place in European society and ways of managing change
- relationships between technology, employment and society
- mechanisms for collective action in terms of governance and citizenship
- learning development strategies fostering growth, employment and economic and social cohesion

Key activities

The project addresses its objectives within three core *domains* - "Society", "Governance" and "Teaching and Learning" - while HE's approach to "Disability" forms a cross-cutting domain. The over-arching theme is concerned with the processes, methods and consequences of "Change" in these domains. The planned outcome is to publish the policy related outcomes of the project and to present the key recommendations to the EC HE policy directorate in Brussels at the end of the project. The projects's key activities follow.

Disability Research Group (DRG)

The DRG's programme runs from April 2002 to October 2003 and is involves collaborative investigations and activities concerning the needs of disabled students. The outcomes will be a variety of manuals, papers and policy recommendations relating to the needs of disabled students. The principal activities were:

Workshop at ICCHP Conference: "*Studying and Academic Mobility - IT Support for Students with Disabilities*" 15 – 20 July 2002, Linz, Austria

Collaborative research projects on "*conditions which affect un/employment for disabled graduates*" and "*teaching and learning strategies for visually impaired students*"

Scientific paper at ICCHP Conference 2004: "*Inclusion of blind and visually impaired persons into higher education*" (special thematic session / workshop at ICCHP 2004)

Domain 1 - Society

Activities that are concerned with exploring the underpinning European values in relation to HE in each country. The outcomes will comprise conference papers and policy recommendations. The principal activities were:

Seminar 1. *"The changing role of HE: contexts, histories and the development of lifelong learning (LLL) through Continuing Education (CE)"* January 2002, Latvia.

Seminar 2. *"The role of tomorrow's HE in fostering gender equity and employment"* April 2002, Greece

Seminar 3 *"European enlargement and citizenship: the role of HE"* September 2002, The Netherlands

Domain 2 - Governance

Activities that are concerned with institutional management and decision making, in particular in relation to issues of quality and accreditation. The outcomes will comprise conference papers and policy recommendations. The principal activities were:

Seminar 4. *"Governance challenges for different nation institutions in managing change"* January 2003, Bulgaria

Seminar 5, *"Addressing inequalities of gender participation in institutional decision making systems"* March 2003, Sweden

Seminar 6. *"Legitimacy, quality and accountability for lifelong learning and higher education"* July 2003, Poland

Domain 3 - Teaching and learning

Activities that are concerned with new developments in teaching and learning in different countries. The outcomes will comprise conference papers and policy recommendations. The principal activities are:

Seminar 7. *"Key features of teaching and learning in the university of tomorrow"* January 2004, UK

Seminar 8. *"Distance education and the use of technology for tomorrow's knowledge society"* April 2004, Lithuania

Seminar 9. *"Guidance for employment and inclusion: the development of new competencies"* June 2004, Czech Republic

Likely Outcomes

The workpackages comprise review papers and discussions at a seminar and supported by a subsequent eForum, a conference paper and a reflective policy document. Four of the scientific workpackages have completed their work and two more are presently completing their policy recommendations. The two workpackages concerned specifically with Disability issues have completed the bulk of their research work and are in the process of finalising the practical and policy deliverables. Thus, though only one workpackage remains, and therefore the bulk of the information gathering has been completed, rather more than half the final policy outcomes are presently in hand.

In addition to the planned work, there has been a number of additional activities. For example, HERN was encouraged by the Society for Research into Higher Education to run a second HERN Symposium at the Society's annual conference at Royal Holloway College in December 2003. The HERN partners have published several papers, given conference and seminar presentations and undertaken research that builds on the work done in HERN. Additionally, a Leonardo project that developed in part from HERN foundations has begun and a proposal for a Framework 6 Network of Excellence (which was developed from the HERN group) was submitted to the European Commission (unfortunately unsuccessfully).

While we are confident that the project will be completed as planned it is interesting to observe how much has changed, both in the field of higher education and within Europe. In one of the projects target areas, structural changes taking place in European society, the most significant event in recent European history took place on May 1 2004 when 15 new member states joined the community. The impact on higher education itself may be large, but it

seems likely that the impact of the enlargement of the European Higher Education Area on the wider society through the increased mobility of skilled professionals may be greater. There will be considerable impact on economic development, particularly in the newly joined states, and especially through the use new communications technologies coupled with lifelong learning.

Other issues have changed during the life of the project largely as a result of broader strategies (such as to facilitate the mobility of labour through the transferability of qualifications) and some, such as institutional governance and the administration of quality assurance regimes, remain a varied patchwork of different (and, perhaps, incompatible systems). While it is too soon yet to draw any firm policy recommendations there is no doubt that the relationship between higher education and the society within which it operates is changing as the Bologna process continues: but that change is not uniform.

The broad indications of project outcomes are:

Governance quality and accreditation: the role of the state is central, but different, in every case studied. If national governments are to retain their autonomy in higher education while achieving an effective convergence towards Bologna principles it would appear that EC policy must achieve convergence without requiring harmonisation. The final recommendations will address potentially fruitful strategic options.

Learning and technology: when looking at the learning and teaching processes there appears to be a noticeable convergence of pedagogic practice and technological support. In all the case studies it has become clear that the fundamental drivers of change are very powerful both from the institutional side (increasing costs vs decreasing per capita income) and from the learners' side (more flexible provision that also meets lifelong learning needs). The final recommendations will address how these drivers may influence the bottom-up element of a future strategy

Inclusion and citizenship: support for disabled students varies widely across the partners, but this is an area where it possible to see real change being brought about by open communication. Gender issues, too, vary widely, but are likely to change through intercultural dialogue. Inclusion, as a more generic issue, has been examined mainly from the perspective of citizenship. While higher education is understood to be involved in the transmission of core cultural values it has proved difficult to a common conception of this at national level, far less at European level. While the recommendations will try to address all the elements it is likely that stronger recommendations will be made in respect of disability and gender.

1.1 Summary of the specific objectives for the period 1 Nov 03 to 30 Apr 04.

Workpackages 1, 2, 3 and 6 have been completed. Workpackages 4, 5, 7, 8, 9, 10 and 11 are or have been in progress during the reporting period. Planning has started on the one remaining workpackage (12). The project management workpackage (13) runs throughout the duration of the project. The objectives below show the planned areas of work for the reporting period:

1.1.1 Workpackages 4 and 5 (Disability Research Group)

Objective 10 deliver a paper at HERN seminar.

1.1.2 Workpackage 7

Objective 5 Circulate a 'brief guide to policy' paper on 'Past and present systems, values and challenges for governance and change in the context of European enlargement'.

1.1.3 *Workpackage 8*

Objective 4 Circulate a 'brief guide to policy' chapter on 'Internal management, gender and staff development in HE in the context of reform and EU enlargement'.

1.1.4 *Workpackage 9*

Objective 5 Circulate a 'brief guide to policy chapter: 'Governance, relations with the state and quality in HE'.

1.1.5 *Workpackage 10*

Objective 1 UK and LT will liaise with relevant partners over publicity and plans for steering group meeting, seminar, presentations, analytical strategies and follow up website discussion

Objective 2 UK hosts steering group meeting and one day seminar. Partners produce case studies on "managing change in teaching" and presentations and papers on "teaching support issues for disabled students" (drawing on research from WP5).

Objective 3 UK-SRHE produces time limited website discussion to explore further the underlying values and issues pertaining to change in teaching and learning strategies.

Objective 4 Partners will prepare a conference paper.

1.1.6 *Workpackage 11*

Objective 1 LT and LV will liaise with relevant partners over publicity and plans for steering group meeting, seminar, presentations, analytical strategies and follow up website discussion

Objective 2 LT hosts steering group meeting and one day seminar. Partners produce case studies from PHARE programmes and comparative discussion papers on distance learning and widening participation.

1.1.7 *Workpackage 13*

Obj 28-33 Project manager to:

Organise Steering Group meeting to be hosted by UK SRHE

Organise Steering Group meeting to be hosted by Lithuania

Ensure timely warning and requests for progress reports as well as the distribution of papers prior to meetings and also that subsequent actions are completed.

Ensure that all databases and records are updated and kept current

Compile and submit interim report of progress during months 25 to 30 to the Funding Body

1.2 Overview of the technical progress.

The preamble to this Scientific overview described progress in overview. The following activities were scheduled to take place during the period.

1.2.1 *Workpackages 4 and 5 (Disability Research Group)*

Objective 10 The Disability Research Group delivered a paper on ways of supporting visually impaired students in HE at the HERN seminar in Glasgow in January 2004. (Deliverable 39)

1.2.2 *Workpackage 7*

Objective 5 The Bulgarian partner has circulated a policy paper on 'Past and present systems, values and challenges for governance and change in the context of European enlargement'. (Deliverable 36)

1.2.3 *Workpackage 10*

Obj 1 and 2 HERN seminar 7 on the "Key features of teaching and learning in the university of tomorrow" was held at the University of Glasgow and the University of Strathclyde in Glasgow, Scotland in January 2004. (Deliverable 40)

1.2.4 *Workpackage 11*

Obj 1 and 2 HERN seminar 8 on "distance education and the use of technology for tomorrow's knowledge society" was held at Vytautas Magnus University, Kaunas, Lithuania in April 2004. (Deliverable 43)

1.2.7 *Workpackage 13*

Workpackage 13 is the project management workpackage. In addition to the routine project administration and maintenance tasks the project manager:

Completed and submitted the second year's annual progress report for the EC

Worked with the finance officer to collate the annual financial returns to the EC

Presented a paper on the initial policy findings of the HERN project at the SRHE annual conference in December 2003.

Wrote HERN progress report published in SRHE International News

Organised and chaired the Steering Group meeting at the seminar 7 in Glasgow

Organised and chaired the Steering Group meeting at seminar 8 in Kaunas.

Maintained project records and databases

Circulated progress updates following the steering group meetings

Worked with SRHE on eForum and website matters

Worked with partners on planning for seminars 7, 8 and 9

Continued to work with the SRHE Eastern European Network to develop projects to continue HERN's work including the FP6 TRIPOD project.

Worked with Jagiellonian University (PL) to establish a new LEONARDO project concerned with disability (IDOL)

Reviewed project finances and agreed budget changes with partners in order to ensure fair allocation of funds for final year's work.

Began working on reviewing the project's outputs in order to plan for the most appropriate dissemination products.

Reviewed project progress, compiled and submitted interim progress report for months 25 to 30.

1.3 Comparison of planned activities and actual work.

During this reporting period the project has accomplished much and is very close, with only workpackage 12 remaining, to the completion of the seminar-based activities. Despite problems at the beginning the Disability Research Group has reached the final stages of producing its reports, which are expected early in the next period. Four of the planned nine policy deliverables have been received (see para 2.1), one more is almost complete and one outstanding. It is this latter (see para 1.3.1) that is causing some concern though representations to the partner responsible have made it clear that the delivery of this outstanding policy paper must be treated as a matter of the highest urgency. Three other deliverables (see paras 1.3.2 to 1.3.4) are technically overdue but the reasons for delay have been explained and delivery is expected soon.

1.3.1 Workpackage 8

Objective 4 The circulation of a 'brief guide to policy' chapter on 'Internal management, gender and staff development in HE in the context of reform and EU enlargement' is project Deliverable 37. It was due in November 2003 and had not been produced by the end of the reporting period. The matter has been raised at the management meetings, disseminated through the minutes and has been explicitly requested in several emails. The forwarding of further funds to the lead partner has been halted until some evidence of progress is shown. It is understood that the lead partner (KTH-SE) has had difficulty co-ordinating the writing of this deliverable owing to a combination of professional and personal pressures on the academic primarily responsible. The partner is presently working with another academic to ensure the deliverable is completed in June 2004.

1.3.2 Workpackage 9

Objective 5 The circulation of a 'brief guide to policy chapter: 'Governance, relations with the state and quality in HE' is project Deliverable 38. A draft of this has been produced and, at the end of the reporting period, was in the final stages of agreement between the lead partners (JU-PL and CHES-CZ). The delay has resulted from certain fundamental disagreements between the two partners responsible and it is the need to resolve these disagreements that has upset the timetable and caused the present delay. Final production of this deliverable is expected imminently.

1.3.3 Workpackage 10

Objective 3 Following poor response to the previous models of the eForum it has been decided to experiment with a different format again. It had been perceived previously that the limited interaction might have been a consequence of some limitations in the material made available for discussion. In general this meant notes of the outcomes of the seminar. It was felt that while this might have been sufficient for those who were present at the seminar it did not provide sufficient detail for anyone who had not been present. Therefore it has been decided to produce the conference paper first, to circulate it and then to hold the eForum. The partner responsible for Seminar 7 has reported that the paper is in preparation by an academic at Strathclyde University and is presently being discussed among the principal responsible partners prior to wider circulation, after which the eForum will be held. The target is to complete the eForum in June 2004.

1.3.4 *Workpackage 10*

- Objective 4 The paper is in preparation and is presently being discussed among the principal responsible partners (SRHE-UK and VMU-LT) prior to wider circulation, after which the eForum will be held. The paper will be revised in the light of eForum comments and will be completed by the end of June 2004.

1.4 *Planned activities for the next period.*

The planned activities for the period 1 May to the end of the project on 31 October 2004 comprise the activities listed below:

1.4.1 *Workpackage 4*

- Objective 8 Contribute 'guide to policy' on disability perspectives for teaching, learning and change.

1.4.2 *Workpackage 10*

- Objective 5 Produce a brief guide to policy on 'Key issues and strategies for changing pedagogic practice'.

1.4.3 *Workpackage 11*

- Objective 3 UK-SRHE produces time limited website discussion to explore further the social, economic, quality and technological issues relating to distance learning and widening participation in the context of European enlargement.

- Objective 4 Produce conference paper evaluating management of change strategies for ODL study programmes across the HERN partners.

- Objective 5 Produce policy briefing chapter on 'HE through open and distance learning'.

1.4.4 *Workpackage 12*

- Objective 1 Lead partner will liaise with partners over publicity and plans for steering group meeting, seminar, presentations, analytical strategies and follow up website discussion

- Objective 2 CZ hosts steering group meeting and one-day seminar. Partners produce presentations and papers for analytical discussion and contribute ideas for discussion on future collaborations

- Objective 3 UK-SRHE produces a time-limited website discussion to explore outstanding policy issues relating to guidance and access. LV develops interactive CD ROM to disseminate main results of all workpackages.

- Objective 4 partners prepare conference paper and brief guide to policy chapter on student diversity, distance learning and guidance (e.g. FEDORA, SRHE, ESREA).

1.4.5 *Workpackage 13*

- Obj 34-41 Project manager to:
Organise Steering Group meeting to be hosted by CHES-CZ

Ensure timely warning and requests for progress reports as well as the distribution of papers prior to meetings and also that subsequent actions are completed.

Ensure that all databases and records are updated and kept current

Obtain and collate financial data from partners and compile and provide financial reports to the EC for months 25 to 36

Compile the final annual report and submit to the Funding Body
present the project's policy outcomes at the EC

2. List of Project Deliverables

2.1 Deliverables completed.

Four project deliverables were completed during the period 1 November 2003 (month 25) to 30 April 2004 (month 30).

Deliverable	Work package	Outline description of deliverable
36	7	Contribution to brief guide to policy - on past and present systems and challenges for the future
39	5	Seminar paper on ways of supporting visually impaired students in HE society
40	10	A one-day seminar on Key features of teaching and learning in the university of tomorrow and a steering group meeting.
43	11	A one-day seminar on Distance education and the use of technology for tomorrow's knowledge society and a steering group meeting.

2.2 Deliverables in process

Four deliverables were due but remain uncompleted as at the end of the reporting period. The matter has been discussed at both the recent management meetings and representations have been made to the partners responsible urging rapid completion.

Deliverable	Work package	Outline description of deliverable
37	8	Brief guide to policy on 'Internal management, gender and staff development in HE in the context of reform & EU enlargement' <i>The lead partner has had problems co-ordinating the efforts of contributors. Urgent efforts are being made to complete the deliverable.</i>
38	9	Chapter for brief guide to policy - "Relations with the State and quality in HE" <i>A draft of this paper has been received but the partner responsible is still revising the final version.</i>
41	10	eForum and report of website discussion <i>The eForum is now planned to follow the circulation of the conference paper – D42. The reason for the change has been the continued difficulty to engage significant discussion. It had been suggested a more substantial document was required as the focus – hence using the draft conference paper as the focus for discussion.</i>
42	10	Conference paper on Key theoretical issues and strategies for changing pedagogic practice <i>The partner responsible is working on the paper but owing to</i>

		<i>other commitments progress has been slower than expected. A draft is being discussed among the principal partners, but has not yet been released.</i>
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2.2 Deliverables due next period

In addition to the four outstanding deliverables, a further twelve are due in the next and final period. Work on several of them is already well advanced. The management group has agreed that partners must accelerate the delivery if the policy deliverables 49, 50 and 52 which are due in month 36. The aim is to have at least firm drafts available by the end of August in order to allow sufficient time to draw together all the many recommendations into a cogent final document.

<i>Deliverable</i>	<i>Work package</i>	<i>Outline description of deliverable</i>
44	11	Linked eForum and report of website discussion
32	5	scientific publication on new perspectives for social integration of visually impaired students in HE society
45	12	A one-day seminar on Guidance for employment and inclusion: the development of new competencies and a steering group meeting.
46	11	Conference paper: Evaluating management of change strategies for ODL study programmes across Central and Eastern Europe
47	12	Linked eForum and report of website discussion
48	4	Contribution to guide to policy on disability perspectives for teaching, learning and change.
49	10	Chapter for brief guide to policy: Key issues and strategies for changing pedagogic practice in different EU contexts
50	11	Chapter for brief guide to policy: 'HE reform, teaching and learning, change and quality: student diversity, distance learning and guidance
51	12	Conference paper on Student diversity, distance learning and guidance
52	12	Chapter in brief guide to policy: HE Reform, teaching and learning, change and quality: student diversity, distance learning and guidance
53	12	Interactive CD ROM
54	13	Plan for future collaborations

4. Exploitation and dissemination of results

At this stage of the project the main aim of dissemination is to ensure that as many people as possible are made aware of the project and its intended outcomes. It is still too early to be able to make substantial contributions either to knowledge or policy development but we can prepare the ground, and that is what current activities have been doing. During this period the following dissemination activities took place:

Partner presentations and publications

The Bulgarian partner presented a paper on HE Governance arising from seminar 7 at the 2nd European Cultural and Educational Forum on the cultural and educational impacts of the enlargement of the European Union (18-21 December 2003, Bruges, Belgium).

The Lithuanian partner presented the following papers drawing on HERN work:

- “*Approaches to Learning in Lithuanian Institutions of Higher Education: Prerequisites for LifeLong Learning*”, Higher Education: Diagnosis and Prognosis, Lithuania, December 11 - 12, 2003, V. Zuzeviciute (VMU, Kaunas)
- “*Theory and Practice in Teacher Training*”, Riga, Latvia, April 5 - 7, 2004.
- “*Education. Culture and Sustainable Development*”, Adult Learner: Challenges for their Teachers: Tallinn, Estonia, April 13 - 16, 2004, N. Bizys, V. Zuzeviciute (VMU, Kaunas)

The Polish partner presented a paper “*Quality Assurance in Higher Education – New Challenges after the Berlin Conference*” in Forum A3: European Quality Standards? at the HRK conference in Bonn, 20-21 November 2003.

HERN Symposium

The project was, for a second time, able to run a symposium at the annual conference of the Society for Research into Higher Education (SRHE) at Royal Holloway College in Egham. The symposium was open to everyone attending the conference and comprised:

- “*The HERN project – indications of outcome*” - Ivan Kent (University of Surrey Roehampton)

“*HERN – Networking people, institutions and ideas*” – Marek Frankowicz and Agata Kozielska (Jagiellonian University, Poland) – also, see article on page 8 of www.uj.edu.pl/IRO/NEWSLET/IRO23/newsletter_23_www.pdf

SRHE Eastern European Network

The HERN project grew out of the collaboration of several members of the SRHE’s Eastern European Network and steps were taken to rebuild the network in parallel with HERN and as a means of continuing development and aiding dissemination. This resulted in the creation of a Framework 6 Network of Excellence proposal called TRIPOD. Unfortunately this proposal failed to pass the evaluation but has led to other and continuing links that are presently being developed with a view to further project development.

SRHE News and SRHE International News

Since the start of the HERN project, the SRHE has provided space to publish material about the project in the newsletters it publishes for members. In this period the following appeared:

HERN progress reports (including a synopsis of outcomes) published in every issue of SRHE International News

Reports of the progress of the TRIPOD project published in October and January issues of SRHE International News

Report of Eastern European network activities published in SRHE News.

Seminar live broadcast

Seminar 8 (April 2004) in Lithuania concerned technology and distance education. The organisers therefore arranged for the proceedings to be broadcast synchronously on the web. The link for access was disseminated widely before the event. The recorded proceedings were then archived and are accessible via the link:

<<http://distance.ktu.lt/vips/join.php?sr=94&l=en>>

EForums

The electronic discussion forums (eForums) that follow each seminar continue but have been modified to use a web-based environment that allows all the features available in the previous

software-based approach ('Groove'). The primary advantage being that access is no longer limited to persons who have 'Groove' installed. Also, a special area of the web-site was created to facilitate interactive discussion. Despite running the revised format after the seminar in June 2003 and again in January 2004 it has proved no easier to get participation from more than a few people and with none of the wider access that had been intended. Nevertheless, they have proved useful to those people who have accessed the eForum.

Websites

The main project website (www.HEreform.Net) is accessible directly or via a link from the SRHE website (www.SRHE.ac.uk). The website is publicised in all the communications put out by the project. In addition, the following sites also make reference to HERN:

Lithuania: <http://www.vdu.lt/Social/edukologija/hpse-en.html>

Lithuania: http://msi.lms.lt/5FP/IHP/ihp_hern.html

Czech republic: http://www.csvs.cz/projekty/2001_hern_sramek/

Poland: www.uj.edu.pl/IRO/Programy_badawcze/projects_en.html

Sweden: <http://www.kth.se/forskning/pocket/project.asp?id=16525>

PJ Bates Associates: <http://www.pjb.co.uk/npl/bp57.htm>

European Commission: http://dbs.cordis.lu/fep-cgi/srchidadb?ACTION=D&SESSION=261172004-5-11&DOC=1&TBL=EN_PROJ&RCN=EP_RCN_A:58323&CALLER=PROJ_FP5

European Commission: http://improving-ser.jrc.it/default/show.gx?page=show-PRJ.html&Object.object_id=TSER----00000000000016F8

MANAGERIAL REPORT

5. Management and co-ordination aspects

Management meetings

Management meetings were held at the seminars in Glasgow (Jan 04) and Kaunas (Apr 04). In addition a meeting with the Disability Research Group was also held in Glasgow (Jan 04). The outcomes of the meetings have been very positive and they have proved necessary to ensuring that partners are supported in their work on the individual workpackages.

The main purpose of the management meetings concerns solving problems before they have an impact on the outputs. In general this works but not all partners attend the management meetings if they are not involved in that particular workpackage. While we have tried to encourage every partner to attend we cannot insist because there is no clear contractual obligation to do so. While this is not a major problem it means that decision making does not always involve all partners equally.

Communications.

Email is the primary means of communication. A web-based project management tool (eProject.com) was tried as a central reference point in order to give partners ready access to all the project management information and documentation. Unfortunately this was not used by the majority of partners and the experiment was abandoned when it became clear that email remained the primary means of contact.

Finances

The partners are concerned that the Year 3 advance was only received on 23 April 2004 – 4 months after the papers were received in Brussels. This has caused problems for several partners because of internal financial regulations that bar cross-financing of projects. The delay in forwarding the funding exacerbated problems because it introduced uncertainty and also meant that project expenses could not be reimbursed. This further limited partner's ability to attend seminars. Coupled with the similar delays experienced last year it is noticeable that some partners are less willing to go beyond the basic contractual requirements. While this is unlikely to damage the project's specific goals it will limit additionality.

It became clear during the review of plans for year 3 against budgets that there would need to be some readjustment of partner budgets to ensure all the objectives were met. The review was based by fitting the remaining funds to the amount of partner-person-months still to be completed. All partners have agreed the revision, which was under the 20% limit. Nevertheless, further discussions prior to and at the management meeting in April suggested that some more adjustment might need to be made and the project manager was asked to re-examine the budget in light of partner needs and, if necessary, to make a formal proposal for a budget revision to the EC in May 2004.

Project outputs

Despite some delays in producing deliverables the partners all agree on the need to produce a coherent output. Indeed, much of the delay to D38 has arisen because the Quality arena is so active and it has proved difficult to find a suitable endpoint. Concern about D37's delay remains high since it is a highly specialised area within the project. Nevertheless, a contingency plan is in hand should it be necessary for the project manager to step in.

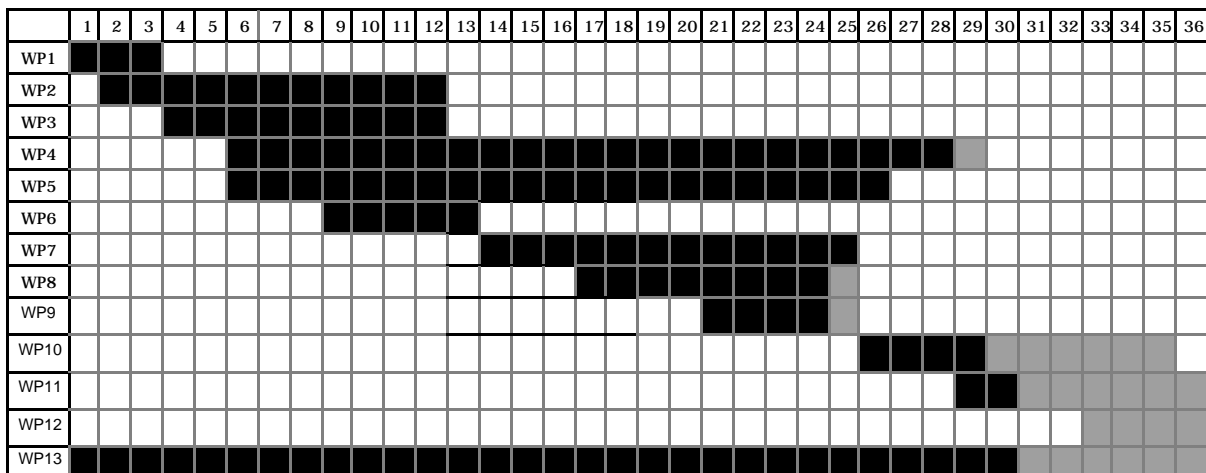
On a more positive note, it is now clear, with most of the groundwork complete, that the project has been much richer in its outputs than originally envisaged. In part this is because the interaction of the partners has been much more fruitful than the plan foresaw. In part, too, the project is operating in a HE environment that is much richer in, particularly, those areas where HE is engaging with social and economic processes.

The enlargement of the EC on 1 May is now a fact whereas it was a distant objective when the project was drafted. The context of the project, European enlargement, has changed from planning for something yet to happen to facing the operational challenges of the new reality. This was nowhere clearer than at the seminar in Kaunas (held 9 days before enlargement) when everyone realised that this event would not only remove a division in Europe, but also a very significant one between partners. The impact of this on project outcomes will be beneficial because it has placed the key HERN issues into a common framework of shared goals.

That said, the project outputs are heavily end-loaded with three of the most important policy deliverables not due until the very end of the contact period. Agreement was reached at the last two management meetings to accelerate the deadlines for these key policy deliverables in order to gain time to refine them and bring them consistently into the common framework. It has been agreed to review progress at the management meeting in Prague and to hold a further meeting in September (possibly in Linz) to draw all the strands together.

Workplan

The project bar chart is unchanged and shown below (outstanding work in grey):



Partner involvement in the workpackages is shown below:

WP	WP Lead Partner(s)	HERN Partners										
		1 USR UK1	2 SRHE UK2	3 CHES CZ	4 VMU LT	5 BES BG	6 NCUA GR	7 KTH SE	8 JKU AT	9 ESREA NL	10 CEDeF LV	11 JU PL
1	UK1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2	LV	✓	✓	✓	✓					✓	✓	✓
3	GR	✓	✓				✓	✓		✓	✓	✓
4	AT/UK2/GR	✓	✓				✓	✓	✓		✓	✓
5	AT	✓	✓				✓	✓	✓		✓	✓
6	NL	✓	✓							✓	✓	✓
7	BG	✓	✓	✓		✓		✓			✓	✓
8	SE/UK	✓	✓			✓		✓			✓	✓
9	PL/CZ	✓	✓	✓				✓	✓		✓	✓
10	UK/LT	✓	✓	✓	✓	✓		✓	✓		✓	✓
11	LT/LV	✓	✓	✓	✓				✓		✓	✓
12	CZ	✓	✓	✓	✓		✓		✓	✓	✓	✓
13	UK1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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6. Annexes

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Annex 1

DELIVERABLE N° 36

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

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Domain 2:	GOVERNANCE
Workpackage 7:	Governance challenges for different nation institutions in managing change

A BRIEF GUIDE TO POLICY PAPER

o n

Past and present systems, values and challenges for governance and change in the context of European enlargement

Deliverable 36

Written by Nikolay Popov

Sofia, Bulgaria, 2004

Time (person/months) involved:

BG		2.5
CZ		1.5
SE		0.9
PL		0.9
UK (SRHE)	-	1.0
UK (USR)		1.0

Objectives

- To analyse what forms of institutional adaptation and innovation could address the need for effective and equitable policy making in HEIs.
- To explore the implications of existing governance change projects on HEIs in Bulgaria and other Central and Eastern European countries.
- To use seminar and website discussions to give an analytical comparison of what forms of institutional decision making can foster or hinder convergence towards a collective European interest.
- To contribute to end of year policy briefing paper for the influence of future policies on Governance reform in relation to EU enlargement.

Expected results

The workpackage will provide policy makers, management and academics with comparative, analytical findings and policy guidance about historical, social, political and economic contexts for governance changes in HE.

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Introduction

Higher education has been one of the most dynamic and challenging spheres in the countries of Eastern and Central Europe in the last 14 years. If we have a look at the educational systems of the countries of this region of Europe, we will see that changes in higher education have been much more expressive and meaningful than changes in primary or secondary education. East-Central Europe provides typical examples of how people in countries in economic and social crisis decide that higher education is one of the most reliable financial and intellectual investments.

Looking at the past 14 years in Eastern and Central Europe it would be said that two main approaches to higher education governance have been applied. The first one can be called "forestall-approach". That is when a higher education policy appears before the new practice.

The second one can be called "go-after-approach". That is when a higher education policy appears after the new practice in the field. I would say that this is the Bulgarian model of higher education reform: the State first leaves all higher schools to do everything they want and can and then legalises the established situation.

During their long history universities have been constantly developing their specific mechanisms of adaptation to changing external and internal demands in order to survive and keep their prestige role in the wider society. Specific organisational and governance structure of universities has proved to be one of the crucial variable of their successful confrontation with turbulent and unknown changes and challenges, incorporating always new forms and layers into the existing structure. Universities world-wide have been recently confronted with the new flow of changes and demands, unprepared to respond to them adequately with their existing organisational and governance structure. Although these changes and demands are common for the majority of the academic world, it seems that continental European universities (whose part are also Croatian universities) have been confronted with the strongest transformations (Neave and van Vught, 1994; Sanyal, 1995) due to their functioning under the tight state control and regulation as a dominant type of co-ordination and control in higher education. Universities should be left to their own devices to deal with new challenges mostly expressed in terms of self-regulation, self-financing and market behaviour according to the unclear (if defined at all!) market mechanism and unclear quality criteria. It is obvious that all changes are going on in the context of globalisation and internationalisation of higher education, as a part of wider societal and political movements towards the international integration. If Croatian universities want to enter into the desired, but demanding European Area of Higher Education – they must prepare themselves by developing adequate organisational and governance structures. In ongoing public discussions concerning the implementation of the new Law on higher education in Croatia, certain concepts are planned to be introduced under the new policy with some of them never being experienced in Croatia by now. Changes usually cause doubt and resistance from the academic staff. (*Quotation from the Croatian paper presented at HERN Seminar 4, Sofia, January 2003*).

Transformation process starting in 1990 led to the principal changes of the relationship between the state and higher education institutions. Analysis of the positive as well as negative elements of the system's performance resulted in the acceptance of the new legislation rules and the relevant new models of the governance on both institutional and state levels. The situation was characterised by the basic change of property rights of institutions connected with the change of their status from the state institutions on the public ones. The high level of institutional diversification, the possibility of the private higher education institution establishment and newly structured internal governance were another important characteristics of the development. The main characteristic of the higher education system is the high autonomy and self-governance of higher education institutions and the indirect steering of the system from the state level by means of the distribution of the state money. (*Quotation from the Czech paper presented at HERN Seminar 4, Sofia, January 2003*).

Sources

Three main sources were used:

Papers presented at HERN Seminar 4

HERN Seminar 4, Workpackage 7 on “Governance challenges for different nation institutions in managing change” was hosted by BESBG in Sofia, Bulgaria, on 23-25 January 2003.

The following partners attended the seminar: UK 1; UK 2; CZ; LV; BG; S; PL.

BG, CZ, LV and S presented the following written papers:

- Nikolay Popov. *Higher Education Governance in Bulgaria*.
- Libor Novacek. *Changes, Innovations and the White Book on the Education in the Czech Republic*.
- Atis Kapenieks, Bruno Zuga, Ilmars Slaidins, Ilze Buligina. *Higher Education Governance in the Knowledge Society*.
- He lge St röm d ahl. *On the governance of Higher Education in Sweden*.

Another paper by Croatia that is not a HERN member was also presented:

- Vesna Kova_, Jasminka Ledi_, Branko Rafajac. *Academic Staff Participation in University Governance: Internal Responses on External Quality Demands*.

UK also sent its paper entitled *The UK Situation*.

Publications on Web-sites

Many on-line publications of organizations specialized in providing information on educational reforms in CEE are available at the following addresses:

- Research Support Scheme: E-Library. <http://e-lib.rss.cz/diglib>
- Discussion Series, Civic Education Project. <http://www.cep.org.hu/discussion>
- South East European Educational Cooperation Network. www.see-educoop.net

State documents

- Higher Education Acts and Amendment Acts adopted by National Parliaments in 1990-2002
- White Papers created by national managing bodies (mainly Ministries of Education and HE) and commissions
- HE data provided by national institutes of statistics

Common structure of detailed discussions of Higher Education Governance

The following problems were proposed and accepted as a common structure of detailed discussions of Higher Education Governance:

- 1) Functions of the State in higher education governance
- 2) Structure of the higher education system
- 3) Academic autonomy
- 4) Organization of higher schools
- 5) Accreditation of higher schools
- 6) Finance of higher schools
- 7) Conclusions and prognoses

HE governance was examined at three levels:

- 1) National (Parliament, Government, Ministry, some national councils)
- 2) Institutional (Central, Faculty, Department)
- 3) Self-governance of students

Functions of the State in higher education governance

General role of the State

The role of the State generally comprises the following functions:

1. Developing and implementing the national policy for the promotion of higher education and safeguarding academic autonomy of higher schools.
2. Taking care of the quality of the training process and research, and specifying the conditions for the state recognition of the diplomas issued by higher schools in the home country and abroad.
3. Financing the training of students and postgraduates in public higher schools and providing, under certain conditions, scholarships, places at hostels, food, transport and accommodation.
4. Providing, under certain conditions, loans and social benefits to students.
5. Providing property to the public higher schools and ensuring tax and other concessions for the performance of the schools' activities.
6. Financing higher schools by funds of the state budget.
7. Enlargement of the access of the native born citizens to higher education.
8. Providing tax preferences to higher schools as well to those organizations which invest funds for development of higher education.
9. Establishing conditions for equal access to higher education.

The State exercises its functions in managing higher education through: Parliament, Government, and Ministry of Education.

Functions of Parliaments

The superior function of Parliament is adopting national higher education acts and making changes and amendments, as well.

Parliaments of some East-Central European countries (Bulgaria, Hungary, Poland, Romania, etc.) have two other main functions:

- to establish, transform and close higher schools (state and non-state);
- to adopt the state budget for higher education and to allocate (in some cases) the state subsidies for each higher school.

Two cases, of Bulgaria and Hungary, are enough to show these functions. For example:

Parliament shall:

1. Make decisions to establish, transform or close higher schools;
2. Allocate subsidies for each public higher school on annual bases by the State Budget Act.

(Bulgaria: Higher Education Act 1995, Higher Education Amendment Act 1999, Chapter 2, Article 9, Para 2)

Parliament shall:

1. lay down the development plan for higher education;
2. in the budgetary act, determine the annual operating budget and development budget for higher education;
3. establish, develop and abolish state higher education institutions;
4. recognise the establishment and abolition of a non-state higher education institution, and withdraw recognition of it.

(Hungary: Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 4, Chapter 18, Section 70)

Parliaments of other East-European countries (for instance, Russia) do not make decisions to establish, transform or close higher schools. This function is performed by the following authorities:

1. State higher education institutions under the jurisdiction of the Russian Federation are established and transformed by the Government of the Russian Federation.
2. Higher education institutions under the jurisdiction of the Russian territories are established and transformed by the legislative and executive bodies of the Russian territories.
3. Municipal higher education institutions are established and transformed by the local executive bodies.

The Federal Assembly (Parliament) of the Russian Federation shall:

1. develop projects of acts, adopt federation acts, make changes and amendments in the current education acts;
2. approve federation programs for development and control of higher education;
3. approve the federal higher education budget;
4. determine the state higher education requirements;
5. make ratification of international contracts between the Russian Federation and other countries in the field of higher education.

(Russia: Federation Act on Higher and Postgraduate Vocational Education 1996, Chapter 4, Article 24, Para 1)

Functions of Governments

The review of this problem shows that the Governments of Bulgaria, Croatia, Hungary, Latvia, Lithuania, Estonia, Russia etc. have got a wide range of functions in the management of higher education.

Their governments usually:

1. Approve the general guidelines of the national policy in the higher education sphere;
2. Propose to Parliaments the establishment, transformation or closing of higher schools as well as the amount of the annual state subsidy for each public higher school;
3. Establish, transform or close faculties, affiliated faculties, colleges and institutes of the public higher schools and shall determine their status basing on a request by the respective higher school and/or a proposal by Ministries of Education;

4. Approve the state register of educational and qualification degrees in the individual specialties;
5. Approve the unified state requirements for obtaining educational degrees by professions or specialties;
6. Approve the number of students and post-graduates by subjects, whose training shall be funded by the state, and the maximum number of students and post-graduates who shall be trained at each public higher school;
7. Determine the amount of term tuition fees for students in paid education for each public higher school;
8. Approve the terms and conditions for granting scholarships in public higher schools and for accommodations in students' hostels;
9. Approve the state requirements for the recognition of higher education attained at foreign higher schools;
10. Represent the interests of national higher education and science before other states and international organizations and shall enter into international contracts and agreements.

In Poland, Romania, Slovakia, the Czech Republic, etc. the Governments are released from many responsibilities in higher education and almost all functions of management are given to the Ministries of Education. For example, the Government of Romania has only two main functions:

- to determine the year enrolment quota in free public higher education institutions;
- to decide on the length of full-time programs in long-term university education.

Functions of Ministries of Education

Ministries of Education are the state authorities for the implementation of the national policies in the higher education sphere.

According to the management scale and powers Ministries of Education have, they could be divided into three groups:

1. Ministries of Education with limited functions in managing higher education. This is the typical case of Bulgaria.
2. Ministries with "soft" functions in managing higher education. This group consists of Hungary, Poland, the Czech Republic, Slovakia.
3. Ministries with "hard" functions in managing higher education. This group consists of Romania, Latvia, Lithuania, Estonia, and Russia.

Some examples:

Group 1: Bulgaria

The Ministry of Education and Science shall:

1. Make proposals before the Council of Ministers;
2. Perform co-ordinating functions in the relationship between the autonomous higher schools and the State;
3. Establish and maintain a state register of specialties in higher schools;
4. Arrange for the recognition and legitimation of the diplomas of persons who shall have completed their studies abroad;

5. Appoint acting Rectors of new or transformed public higher schools pending the elections to be held there.

(Bulgaria: Higher Education Act 1995, Higher Education Amendment Act 1999, Chapter 2, Article 10, Para 2)

Group 2: Hungary and Poland

The Hungarian Ministry of Education shall:

- a) participate in the preparation and formation of state decisions concerning higher education development and policy;
- b) make budgetary proposal before the Government;
- c) exercise legal review of state higher education institutions;
- d) determine the qualification requirements of postgraduate education on the basis of the opinion of the Hungarian Accreditation Committee;
- e) decide on the basis of the standpoint of the Higher Education and Research Council, the number of state financed students who may be admitted to first year in various levels of education;
- f) supervise the effectiveness and lawfulness of the utilisation of resources made available by the state;
- g) support the establishment and development of the international links;
- h) form conditions of awarding professorial scholarships;
- i) make financial proposals to the Government;
- j) regulate the conditions for the awarding of doctoral degrees;
- k) authorise the operation in Hungary of foreign higher education institutions considering the opinion of the Hungarian Accreditation Committee;
- l) regulate the organization and basic principles of the Higher Education and Research Council.

(Hungary: Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 4, Chapter 18, Section 74)

The Ministry of National Education of Poland performs the following:

1. authorisation of establishment of private universities;
2. allocation of budget funds to universities;
3. supervision over schools of higher education;
4. co-ordination of international co-operation;
5. determination of conditions for persons who may be sent abroad for research, teaching and training purposes;
6. determination of forms and conditions for studies, research and training of non-Polish students.

(A brief explanation of: Poland: Act on Schools of Higher Education 1990, Section 2, Chapter 1, Articles 31-33)

Group 3: Romania

The Ministry of Education of Romania:

1. decides the general criteria for university entrance;
2. establishes new faculties;
3. defines the criteria for the Bachelor's degree examinations;
4. defines the criteria for admission to Master's programs;
5. approves the enrolment quotas for State-budget subsidised Master programs and Doctoral programs;
6. co-ordinates research activities in higher education;
7. develops the framework methodology and curricula for higher school admission contests;
8. approves the establishment of colleges and faculties;
9. formulates and implement medium and long-term instruction and education reform strategies;
10. concludes agreements and conventions with other states for the recognition and equivalence of study credits and diplomas.

(An explanation of: *Romania: Law on Education 1995, Title II, Chapter IX*)

Functions of other state authorities

By "other state authorities" I mean the cases when President, Prime Minister, or some state councils have functions of management (real or of presentation only) specified by law.

There are not any specific functions of the President and Prime Minister in the field of higher education in Bulgaria and Romania. However, Hungary and Poland are very interesting countries in this respect.

In Hungary the President of the Republic performs two official functions:

- a) appointing and dismissing university professors;
- b) mandating and dismissing university rectors.

The functions of the Prime Minister of Hungary are as follows:

- a) appointing and dismissing college professors;
- b) mandating and dismissing college director-generals, and, in non-state colleges, confirming college director-generals;
- c) mandating and dismissing the chairman and members of the Hungarian Accreditation Committee.

In Poland the President of the Republic grants the title of professor.

Two councils in Hungary and Poland play very important role in managing higher education. In Hungary this is the Higher Education and Research Council, and in Poland is the Central Council of Higher Education. These councils act as advisory and policy-making bodies of the Ministers of Education.

In Hungary:

- (1) The Higher Education and Research Council shall be a proposal-making, decision-preparing and opinion-giving body of the Minister of Education which assists the performance of tasks connected with higher education and with scientific research.

(2) The Higher Education and Research Council, as the major professional body of higher education, shall:

- a) work out its conception to develop and modernise the structure of higher education institutions
- b) adopt a standpoint on the principles to modernise the state support;
- c) work out the system of performance indicators;
- d) shape the aspects of priority of the stress developmental programs;
- e) make proposals on any subject connected with higher education.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 4, Chapter 19, Section 76, Paras 1-2)

In Poland:

- (1) The Central Council of Higher Education shall be an elective representative body of the schools of higher education.
- (2) The Central Council shall cooperate with the Minister of National Education and other state authorities.
- (3) The Minister of National Education shall provide administrative servicing and financial means indispensable for the functioning of the Central Council.

(Act on Schools of Higher Education 1990, Section 2, Chapter 2, Article 35, Paras 1-3)

(1) The Central Council, upon request of the Minister of National Education or on its own initiative, shall:

1. determine conditions to be met by a school of higher education in order to organise and run studies in a given field, minimum program requirements for particular fields of studies and names of such fields;
2. lay down criteria setting a number of posts of professors for each field of studies;
3. determine conditions to be met by the school to be able to award professorial titles.

(2) The Central Council shall also:

1. suggest directions for development of schools of higher education in the field of scientific research, training of academic staff and didactics as well as the material facilities of the school;
2. give its opinion on criteria of granting, subsidies and other means from the state budget;
3. give its opinion on draft normative acts on scientific research, schools of higher education, academic degrees and the academic title, as well as draft international agreements;
4. give its opinion on its own initiative on matters regarding schools of higher education and shall express its opinion on matters presented to it by the Minister of National Education.

(3) The Central Council shall cooperate with competent ministers and seek opinions of competent organizations.

(Act on Schools of Higher Education 1990, Section 2, Chapter 2, Article 42, Paras 1-3)

The functions of the State in managing higher education in some countries are presented in Figures 1-5.

The following paragraphs describe the changing relationship between state and higher education in Croatia:

Relationship between state and higher education could be observed through several dimensions: one aspect is the way in which state runs the decision making processes concerning some key elements of higher education policy: allocation of funds, admission policy, determining curriculum standards, diplomas, expansion of higher education institutions or employment policy. Croatian higher education has been traditionally reflecting the system of rational planning and control (classification used according to the Neave and Van Vught, 1994). Most of the financial support came from the state budget: so far, the state has financed institutions of higher education (faculties, polytechnics) following the "traditional principle", that is, by allocating funds in the amounts proportionate to the already existing staff of the already existing institutions. In order to keep control over the total amount of funds, the state used to control employing new staff (by granting or refusing its permission). State also has full control over issuing accreditation for performing the activity of higher education to institutions of higher education.

However, current initiatives in higher education in Croatia, explained in the last version of draft of the new Law of Higher Education and Science, proposed by the Croatian Ministry of Science and Technology in July 2002, are pointing on introducing the system of self-regulation with the special emphasis on decentralisation and introducing the principle of market behaviour. State should step back from direct, central control encouraging universities for autonomy, self-regulation and market-orientation in their activities. Croatian universities, fragmented into powerful and independent faculties, are not able to implement principles of university autonomy easily and without difficulties. Considering those newly proposed changes, although following global trends in higher education policy world-wide, it can be argued that Croatia would fit in the group of countries with "self-regulation in difficulties" (Sanyal, 1995), because of some heritage of the previous system which would make certain movements more difficult or even impossible. Several circumstances derived from particular national and higher educational context and dynamic, structure and size of higher education, tradition and mentality of academic community should form the basis for future reforms, together with the trends of globalisation, integration and adoption of (successful) foreign experiences.

(Quotation from the Croatian paper presented at HERN Seminar 4, Sofia, January 2003).

Functions of the State in the Czech Republic are very well shown in the texts below:

The Czech Republic declares in the national conceptual documents that its system of higher education has undergone the deep changes. The background of this statement lies first of all in the year 1990. The deep and overall changes of the society were incentives of the immediate complete change of the higher education legislation. The important change of the relationship between the state and higher education was one of its main characteristics. The development of the state strategy and the tools of governance in the decentralised environment is the topic of the contribution.

The higher education act approved by the Parliament in 1990 enabled almost immediate transformation from the highly centralised system to the system based on the extremely broad autonomy and self-governing rights of higher education institutions. The decentralisation is very common idea of the last several decades in Europe but also at other continents. Anyway - the Czech case differs significantly due to at least three main facts:

- Starting conditions formed by the 40 years development were very different from that in most European countries
- Central governance was until 1990 fully subordinated to the political power without realistic base of its decision-making (no realistic idea had chance to be accepted)
- The change from centralised to extremely decentralised conditions was extremely quick (period of time was several times shorter than in the majority of other countries)

The last point can be illustrated by the example of the higher education act preparation and its approval in 1990. All activities were cumulated into the very short time of several months followed by the immediate act implementation. The aim was to change the legal rules of the past regime as quickly as it was possible. These conditions of the legislative work did not allow any wide debate neither among the academic community nor among the broader spectrum of other stakeholders

Trying to describe the relationship of the state and higher education institutions in terms of Clark's terminology it is necessary to say that the strong shift of competencies from the highly centralised state power was not focused to the theoretical centre of the triangle, which illustrates the balanced power among the state, academic governance and the market. The change and relevant shift of power occurred almost only in the sense of the significantly decreased power of the state central governance in favour of the academic "oligarchy" while the market did not influence the power distribution too much as in practice it did not exist at that time.

The thoughts about the relations between the state and institutions should take into consideration a number of elements like:

Internationalisation, new types of education delivery and need of the quality assessment and assurance, quantitative development of the tertiary education connected with the strong requirement of diversification, the employment/unemployment of graduates, economy of the particular country with respect to the financial sources for tertiary education, diversification of financial sources including the increase of private funds devoted to education, development of private higher education, the offer of tertiary education by the institutions outside the educational sector and last but really not least the enormous development of ICT influencing all activities of higher education institutions and enabling the fast and broad development of lifelong learning.

Most of these changes could not be reflected by the act of 1990 and they called for the new legislative rules even if the act in question was very important and positive at the time of its adoption.

The time of the new act preparation was significantly longer - it lasted from 1993 till 1998.

In general it can be stated that the high autonomy, academic freedoms and institutional self-governance was confirmed while the role of the state was determined more precisely. The decentralisation of the system was even strengthened as the former state institutions were transformed into the public ones which made them more independent on the state than they were before.

Explanatory note: "Public" in the Czech legal conditions means (among others) that the entity owns its property. In the case of higher education institutions it means that the state property they used was transferred to the institutions themselves.

Coming back to the Clark's classification the new situation opened the way for the better balance among the three main elements of power. The market became more visible from the several points of view:

- Employment/unemployment of higher education graduates has not been still significant issue. The unemployment percentage has been changeable with respect to the different fields of studies and there is no evidence of the specific danger anywhere. On the other side the number of unemployed even low is not negligible and should be taken into consideration as there can be found the increasing trend (1995 – 2 %, 2000 - 3 %, 2001 – 5 %).
- High and all the time increasing number of students requires institutions to think more carefully about their study offer even if there is still less study places than applicants to studies and the real market works here only partly. The competition will come into existence due to the strong decline of the demographic line, which may significantly limit the number of young applicants (fresh secondary schooling graduates) during the next several years. This may be to some extent balanced by both - all the time increased interest for higher education in general and increased number of the older applicants.
- Private higher education institutions are very new, they can be established from 1999 and they are still have a very modest size. It is expected that they will play the

complementary role to the public higher education and so will be rather positive competitive element. But even so they can influence the situation at the study places market in some fields of study.

Influence of the Board of Trustees, which is the new body of the institutional governance composed completely from the members outside the institution, should be also mentioned. They were established primarily due to assure the proper handling with the institutional property. Besides that they are obliged with the initiative role towards the institutional governance and this way they can support the openness of an institution to the public needs. ■■■

In the gradually changing environment of the increasing influence of the market and of the impact of the number of important external elements mentioned above the state power has continued to be reasonably limited. The innovation and very positive change can be found in the quite precise articulation of the rights and responsibilities of the state authority represented by the ministry by the act provisions. The basic tool of the state indirect steering of both the higher education system and possibly also individual institutions stays the state money and the new rules of its allocation.

Construction of the lump sum of the state money for a particular institution is set primarily on the teaching and research performance. The main part of the budget for teaching is based partly on the performance formula (it is expected that for several years this part will stay the major one) and partly on the contract dependent on the coincidence of both institutional and state plans for the development. The last part of the teaching budget is allocated on the other (not formula based) rules. Research budget consists basically also of two parts - the part for the so-called specific research closely related to the teaching activities and the part based on the different research mission.

The institutions being the public entities have changed fundamentally their financial management concerning the property and also budgeting. It is presumed that in the future also the basic part of the budget of a public higher education institution will consist in the state subsidy. There should also be more implementation of other incomes, i.e. yields on property, other incomes from the community budget, yields from auxiliary activity, incomes from gifts and inheritance and from different study fees.

According to the act a public higher education institution is entitled to the state subsidy with the limits defining what this subsidy may be used for.

The above-mentioned auxiliary activity from which the public higher education institution may acquire further means can, therefore, be carried on for payment. It is defined as the activity which serves the more effective use of human resources and property, but which must not threaten the quality, extent and accessibility of the activities for which the public higher education institution was established.

(Quotation from the Czech paper presented at HERN Seminar 4, Sofia, January 2003).

In Sweden, there have been demands for efficiency led to deregulation, decentralization, and more incentives.

One reason for the reform work that started in 1990 was the realization that resources for higher education and research had to be used more efficiently. This is reflected in the governing system in the following two ways:

1. By *decentralizing more decisions* from the Government to the institutions decisions would be better adapted to the local situations, which was expected to bring about better use of the resources.
2. By introducing different types of *incentives* to make institutions use their resources more efficiently.

The decentralization of decision-making had two effects: first the legal frame-work had been abolished or simplified, e.g. concerning internal organization and the organizing of studies, second other types of decisions had been decentralized from the Government to the institutions, e.g. with regard to the provision of programs and courses, the establishing of chairs, and the appointment of professors.

In the Higher Education Act and Ordinance the Government gives a framework for the local legal decisions. The reasons for the remaining central legal framework were as follows:

- basic guarantees for critical thinking and for independent research
- legal security for individual students and academic teachers
- functioning processes for quality assurance
- functioning forms for decision-making and distinct leadership
- exceptions from other legal acts in order to allow institutions to work more smoothly (often concerning labour laws)
- distinct, basic goals and objectives for higher education and research

Government and Parliament share responsibility for the overall governing of the Swedish institutions for higher education and research. This involves:

1. The design of the governing system, i.e. the rules and principles forming the framework for the higher education institutions in Sweden
2. The current application of the governing system.

The Swedish Parliament with 349 elected members decides on the annual budgets and also on legislation. The Government presents the budget proposals to Parliament in a Budget Bill in the middle of September each year, except for election years when it is presented in October. Before that, in April, the Government has presented the guidelines for the 27 different areas of expenditure in a bill to Parliament. Education and research constitute one of these areas of expenditure. Drafts for new laws or guidelines to be approved by Parliament can be presented in bills at any time of the year.

Before Parliament decides on the proposals of a bill, the proposals are sent to a standing committee (or sometimes several committees) for preparation. The Standing Committee on Education prepares all issues on higher education and research.

(Quotation from the Swedish paper presented at HERN Seminar 4, Sofia, January 2003).

The British government policy in the field of HE is very well presented in the text below:

“The entire thrust of British government policy over the last two decades has been to erode and undermine [the right of academic institutions ‘to decide freely and independently to how to perform their tasks’], to do away with the ‘golden mean’ which has defined the relationship between universities and the state in Britain for most of [the 20th] century, and to replace it with a relationship in which universities exist to serve government-defined objectives.”
Geoffrey Alderman, Middlesex University, contributor to the Erfurt Declaration of 1996.

The Secretary of State for Education and Skills in the United Kingdom, The Honourable C Clarke MP, launched the White Paper “The Future of Higher Education” on Thursday, 22nd January 2003. In his foreword, the Secretary of State observes that in “...the early 1960s only 6 per cent of under-21s went to university, whereas today around 43 per cent of 18–30 year olds in England enter higher education...” He also identifies economic success as depending “...upon mobilizing even more effectively the imagination, creativity, skills and talents of all our people. And it depends on using that knowledge and understanding to build economic strength and social harmony. So that immediately identifies two areas where our universities have to improve:

- *First, the expansion of higher education has not yet extended to the talented and best from all backgrounds. In Britain today too many of those born into less advantaged families still see a university place as being beyond their reach, whatever their ability.*
- *Second, we have to make better progress in harnessing knowledge to wealth creation. And that depends on giving universities the freedoms and resources to compete on the world stage. To back our world class researchers with financial stability. To help turn ideas into successful businesses. To undo the years of under-investment that will result in our universities slipping back.*

- *But there is also a third challenge. To make the system for supporting students fairer. Having a university education brings big benefits and while the Government will continue to pay most of the cost involved in studying for a degree, it is also reasonable to ask students to contribute to this...*

There is much more to this White Paper than these introductory remarks but they do capture the spirit of the document which will shape the future direction of higher education in the UK. It is a significant development along a pathway that has taken higher education from the destination of fewer than 1% of young people at the beginning of the 20th Century to the destination of at least 50% by the end of the first decade of the 21st Century. It is also a significant development in increasing the state's control of higher education. It confirms Alderman's prognosis...

The present government in the UK has pointed to complacency in the public services as being the root cause of their need for such radical overhaul and Geoffrey Alderman, in his paper, refers to the 'cosiness' of British universities in the middle of the last Century – so, perhaps, it is this 'complacency' and 'cosiness' that state intervention is forced to overcome.

Other countries looking to the UK for an example should note that the increase in state intervention is not a recent phenomenon. Geoffrey Alderman notes that it has been developing steadily in its present form for at least 20 years and it looks certain to continue on this path for the foreseeable future. There are suggestions that commercial organizations (such as British Aerospace) may be able to create their own degree awarding 'universities' – so it may be that in addition to expanding participation, state intervention will also lead to an increase in the diversity of provision.

(Quotation from the UK paper presented at HERN Seminar 4, Sofia, January 2003).

Structures of the higher education systems

General features of the structures of the higher education systems

It could be said that the structures of the higher education systems in most countries of East-Central Europe have the following common features:

1. They are university systems. All higher education structures consist of university and non-university sectors. The university sector comprises universities and higher schools with statute equal to the university one. In most countries of East-Central Europe the university sector has got the dominant role which find expression in: quality of education, admission requirements, employment possibilities after graduation. In some countries, for example Bulgaria and Hungary, the number of colleges is the same or even a little over than the number of universities. After all, the number of university students and teachers, and the importance and prestige universities have in the society are much higher than those of colleges.
2. The systems are elitist. The admission procedures, systems of exams and requirements to applicants give an elitist character to the systems. Although many attempts have been made, especially in Hungary, Latvia, Lithuania, Estonia, Russia and Poland, the higher education systems have so far continued to be elitist. The increasing number of students enrolled in higher schools in almost all countries of Eastern and Central Europe is not a result of elimination of the elitist character. The increasing number of students is a result of other reasons which will not be discussed in this report.
3. The structures consist of many types of higher schools. The university sector usually comprises: "classical" universities with many faculties; new founded universities with two to three faculties; specialised universities (technical, medical, etc.); religious universities; higher schools with various profiles (technical, pedagogical, economic, etc.); academies; conservatories.

Structures of the higher education systems

1. Bulgaria

(1) Higher schools shall be universities, specialized higher schools (academies, institutes, etc.) and independent colleges.

(2) Universities shall be considered those higher schools which shall:

1. Organize training in a wide range of subjects in at least three of the four major branches of science - humanities, natural sciences, social sciences and technical sciences - covering a substantial number of scientific fields;
2. Be entitled to conduct training for Master's and Doctor's degrees in a substantial number of scientific fields;
3. Have their own scientific capacities and use their own research to develop major branches of science and culture.

(3) Higher schools conducting training in one or two major branches of science and culture may be considered universities and shall have names which shall reflect their specific subjects.

(4) Specialized higher schools shall conduct training in major fields of science, physical education, arts and defence. The name of a specialized higher school shall reflect the specificity of its training process.

(5) Independent colleges shall provide professional qualifications and shall conduct training of students who shall acquire the degree "Specialist in...".

(6) Colleges may also be established within the structures of universities or specialized higher schools.

(Higher Education Act 1995, Higher Education Amendment Act 1999, Chapter 3, Article 17, Paras 1-6)

2. Hungary

Higher education institutions are: state universities and colleges, and non-state universities and colleges recognised by the state.

A university may be established and may operate if it is capable of and suitable for in several areas of science and within areas of science in several disciplines and in several fields of study,

- providing at least four-year university graduate education, and general and specialised postgraduate education;
- carrying on scientific research, doctoral education, and the awarding of doctoral (Ph.D.) degree;
- conducting the habilitation procedure; and if
- its professors possess doctoral degrees and habilitation;
- its readers possess doctoral degrees.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Chapter 2, Section 3, Para 1)

A college may be established and operate only if it is suitable in various areas of learning and in various fields of study for

- providing at least three-year college graduate education, and general or specialised postgraduate education;

- conducting research and development; and if
- its professors possess doctoral degrees.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Chapter 2, Section 4, Para 1)

3. Poland

The schools of higher education are:

- universities;
- higher schools (of technical sciences, agriculture, arts, sport, etc.);
- higher institutes (economical, pedagogical);
- medical academies;
- theological academies;
- vocational schools.

4. Romania

Higher education is provided in:

- universities;
- institutes;
- academies;
- conservatories;
- colleges.

5. Russia

1. There are the following types of higher education institutions in the Russian Federation: university, academy, institute.
2. University is that higher education institution which shall:
 - organize training in a wide range of subjects;
 - organize training, retraining and improving training of graduates, postgraduates and researchers;
 - perform fundamental research in a wide range of sciences;
3. Academy is that higher education institution which shall:
 - offer higher education programs;
 - organize training, retraining and improving training of graduates, and postgraduates in a specific range of sciences;
 - perform fundamental research in the relevant field of sciences;
4. Institute is that higher education institution which shall:
 - offer higher education programs;
 - organize training, retraining and improving training workers in a specific professional activity;
 - perform fundamental or applied research.

5. Another name (conservatory, college) of a higher education institution is possible according to its profile. In this case the type of the higher education institution should be pointed.

Academic autonomy

Approaches to the academic autonomy

There are two main approaches to academic autonomy. The first one can be called “passive” approach. The autonomy is considered as a very important but constant matter that must be described, explained and put on with a legal framework of rules. Then these rules must be followed in any case despite of new realities and circumstances which may appear. In Bulgaria, Romania and Russia this approach is used.

The second one can be called “active” approach. The autonomy is considered as a dynamic matter of permanent development and improvement. Rules are obligatory needed but they may be amended with many new things according to the changing social realities and academic requirements. This approach is used in Hungary, the Czech Republic and Poland.

Expressions of academic autonomy

1. Bulgaria

In Bulgaria academic autonomy gives expression to the intellectual freedom of the academic community and the creative nature of research and education while recognizing them as highest human values.

In Bulgaria academic autonomy finds expression in:

- academic freedom;
- academic self-management;
- non-violation of higher school territory.

Academic freedom finds expression in: freedom of teaching, freedom of research, freedom of creativity, and freedom of training.

Academic self-management finds expression in:

1. The electivity of all bodies with fixed terms of office;
2. The right of higher schools to arrange their structures and activities through their own regulations;
3. The freedom to choose academic and teaching staff, admission procedures and forms of training students and postgraduates;
4. The independent development and implementation of curricula and research projects;
5. The choice of specialties to be taught;
6. The right to announce competitions and appoint lectures;
7. The right to raise funds and independently decide on the terms and conditions for their appropriation;
8. The right to establish international co-operation, to sign contracts and to become members of international organizations.

Autonomy of higher schools is not violated by means of:

1. Interference in the higher schools activities, except for the cases exclusively stipulated by law ;
2. Entering or continuance in the higher school premises;
3. Creation and operation of political or religious organizations at higher schools;
4. Activities infringing upon any constitutional rights of the members of the academic community based on race, nationality, ethnic identity, social background, religion, persuasions or political affiliation.

(Bulgaria: Higher Education Act 1995, Higher Education Amendment Act 1999, Chapter 4, Articles 20-22)

2. Hungary

- (1) A higher education institution shall decide in all matters concerning the institution which the act or other regulation on, the basis of legal authorisation, does not assign to the state or local government sphere of authority.
- (2) In the interests of ensuring freedom of teaching, postgraduate education, artistic activity, research and study, higher education institutions shall have the right, in particular, to
 - a) independent establishment of their system of organization and operation;
 - b) selection of teaching staff, scientific researchers and leaders;
 - c) establishment of the number of students able to be admitted with attention to budgetary support, as well as the deciding of the conditions for admission, and the selection and admission of students;
 - d) deciding of curricula, teaching materials and educational programs, and issuing of certificates, and of degrees testifying to qualifications, and the determinations of conditions for accounting for credits at registration to the institution, or at transferring;
 - e) the working out of scientific research programs, and the deciding and organization of scientific research tasks;
 - f) the right of disposal over approved financial resources and allocations;
 - g) the establishment and development of international education and research connections;
 - h) the introduction and supervision of measures ensuring the quality of educational and research activity conducted in the institution.
- (3) The rights of universities shall extend to the provision of university doctoral education and to the awarding of the doctoral degree, as well as to the elaborating of the rules of habilitation procedure, and conducting it.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 4, Chapter 15, Section 64, Paras 1-3)

3. Poland

Poland is an example of connecting the extent of academic autonomy with the number of academic teachers at higher schools. As a rule, higher schools have a significant degree of autonomy. It is not, however, equal for all schools. Those of them, which employ on the terms of nomination at least 60 academic teachers with the title of professor and where at least one half of organizational units have the right to grant the doctor habilitated degree, have a greater degree of autonomy. These schools take more decisions independently than the others which do not meet these conditions and therefore have a narrower degree of autonomy, a number of their projects needing to be accepted by the Minister of Education.

4. Romania

In Romania autonomy is the right of the academic community to manage itself, exercise its academic freedoms in the absence of ideological, political or religious constraints, and assume such competencies and obligations as conform with the national strategic options and lines for the development of higher education provided by the law. Autonomy links up with personal and public accountability for the overall quality of the teaching and research activity of a higher school.

(1) All the rights and obligations, and the rules regulating university life on the campus are spelled out in the University Charter adopted by the senate of every higher education unit.

(2) Academic autonomy extends to institutional management, structuring and operation; teaching and research activities; administration and financing.

(3) University autonomy is basically exercised by:

- planing, organising, performing and improving the educational process;
- organising research and documentation activities;
- deciding the fields for specialisation;
- working out curricula so as to meet national standards;
- selecting and promoting the academic and other staff;
- setting the criteria for the evaluation of teaching and scientific work;
- awarding teaching, scientific and honorary degrees;
- using the funds and managing them in compliance with the law;
- organizing and inspecting the operation of all economic-administrative services;
- identifying extra sources of income;
- establishing foundations.

(Law on Education, 1995, Title 2, Chapter 9, Section 7, Article 92, Paras 1-3)

5. Latvia, Lithuania, Estonia, Russia

Academic autonomy of higher schools includes:

- self-management in choosing academic and teaching staff;
- self-performance of teaching, research and financial activities in accordance to laws.

A higher school keeps all responsibilities of its activity before the individual, society and State.

Academic freedom covers:

- freedom for academic and teaching staff to form the content of their lectures according to their own view;
- freedom for academic and teaching staff to choose topics of research and to use their own research methods;
- freedom for students to obtain knowledge according to their needs and interests.

Organization of higher schools

Managing bodies of higher schools

The managing bodies of higher schools in Bulgaria are the General Assembly, the Academic Council and the Rector. The managing bodies of higher schools serve for a four-year term of office.

The managing bodies of Hungarian higher schools are the Institution Council (University or College Council) and the University Rector/College Director-General. The members of an institution council are elected for a period of one to three years. The mandate of university rectors and college director-generals is usually four years.

In Poland the managing bodies of higher schools are the Senate and the Rector. They are elected for a three-year term of office.

The managing bodies of Romanian higher schools are the University Senate, the Senate Board and the Rector, and they are elected for a four-year term.

In Latvia, Lithuania, Estonia, Russia the managing bodies of higher schools are more or less the same as in Bulgaria but they are in most cases elected for a five-year term of office.

These collective and single bodies serve at the highest (university) level of management. Under the university level are faculty and department levels. They are managed by Faculty Boards and Deans, and Department Committees and Heads. In many cases colleges and institutes are organised at the faculty level, as well.

If we examine only the university level of management, we can see that:

- There are three sub-levels of management in Bulgarian, Romanian and Russian higher schools: general assembly (senate), academic council (senate board) and rector (with deputy rectors).
- There are two sub-levels of management in Hungarian and Polish higher schools: senate (institution council) and rector. The functions of the middle sub-level body (academic council in Bulgaria, Romania and Russia) are performed by senates or by rectors and deputy rectors (and the relevant officers) in Hungary and Poland.

It could be said that Bulgaria has the most complicated and non-flexible organization of management not only at the university level but at the faculty and department level, as well. This organization is presented in Figure 6.

Structure of higher schools

1. Bulgaria

- Higher schools comprise main and auxiliary units in their structures.
- Faculties, institutes, subsidiaries, colleges and departments are main higher school units.
- Sections, centers, clinics, libraries, laboratories, experimental workshops, printing and publishing houses, production units and other relatively separate establishments are auxiliary units.
- Faculties are the higher school main units, incorporating several departments for training students in one or more related subjects.
- The Faculty General Assembly, the Faculty Board and the Dean are the managing bodies of the faculties. Their term of office is four years.
- The Department Committee and the Head of Department are the managing bodies of the various departments. The Head of Department is elected for a four-year term of office.

- Private higher schools may have different structures, ways of managing and appointing of leading bodies provided these do not infringe upon academic autonomy.

2. Hungary

- A university and a college is divided into faculties and other overall organisational units. College faculties may also operate at universities.
- In higher schools education and scientific research are conducted in educational organisational units (departments, institutes, clinics, etc.).
- A university is headed by a rector, a college by a director-general. He/she performs his/her work in co-operation with deputies.
- The head of a higher school's administrative organization is a secretary-general, subordinate to the higher school's head.
- The head of a higher school's economic organization is a director in economics.
- A university faculty is headed by a dean; a college faculty organised in a university is headed by a director-general; a faculty organised in a college is headed by a director.
- The governing body of a faculty is the faculty council.
- The heads of the educational, scientific research, and artistic organisational units of a higher school are supplied by the head of the organisational unit (department head, institute director, etc.) in co-operation with the council of the organisational unit.

3. Romania

- As a rule, a higher school includes several faculties, university colleges, divisions, departments, research, designing and small production units.
- As the functional base unit of a higher school, a faculty can train in one or more fields. A faculty has divisions and departments.
- Each faculty is a distinct entity by:
 - its admission and graduation conditions;
 - its academic program;
 - its fields of training or specialties.
- A faculty includes academics and students, researchers and designers, support and administrative staff.
- A university college is a distinct functional unit under a higher school or a faculty.
- A division is subordinated to a higher school or a faculty.
- A department is the structural base unit of a faculty or division.
- Something that is not met in the other four countries is the fact that "the rector of an accredited public or private higher school can be suspended from office by the Minister of Education for good reasons". (*Law on Education 1995, Title 2, Chapter 9, Section 7, Article 93, Para 3*).
- Students of a higher school can be represented on the professorial boards of faculties and university senates in a proportion of up to 1:5 of total membership of either.

4. Poland

- The basic organizational unit of the higher schools is the faculty, unless the school's statute provides otherwise. The basic organizational unit holds one or more fields of studies.

- Basic organizational units of the schools are formed, transformed and liquidated by the senate or by the competent minister after having considered the opinion of the Central Council of Higher Education.
- In a higher school there may be formed other organizational units including, in particular, all-school units, interfaculty units or extrafaculty units.
- The higher schools may form other interschool units and units common to other economic subjects, in particular research institutions including foreign ones.

5. Russia

Russia is a country where all kind of higher schools are independent to form their structures. Russian higher schools are the freest in forming their structural units among the five countries. After all, the university-faculty-department structure is most often used.

Functions of the managing bodies

Three examples will be given here: these of Bulgaria, Hungary and Poland. The situations in Romanian and Russian higher schools are very close to the Bulgarian case and that is why they will not be considered in this chapter.

1. Bulgaria

(1) The higher school General Assembly shall consists of professors, associate professors, assistant professors, lecturers and researchers, administrative staff, students and postgraduates from all units of the higher school.

(2) High ranking academic staff shall account for not less than 70 per cent, while student representatives shall account for at least 15 per cent of the membership of the General Assembly.

(Higher Education Act 1995, Chapter 4, Article 27, Paras 1-2)

The General Assembly of the higher school shall:

1. Adopt or amend the Regulations of the higher school activities;
2. Elect the Rector by secret ballot;
3. Determine the number of members of the Academic Council and elect those members by secret ballot;
4. Discuss and adopt the annual report of the Rector.

(Higher Education Act 1995, Chapter 4, Article 29)

(1) The Academic Council shall be the body which shall guide the educational and research activities of the higher school and shall:

1. Determine the educational policy of the higher school;
2. Adopt an annual report on the results of the higher school activities;
3. Make decisions on the establishment or transformation of departments or auxiliary units of the higher school;
4. Determine the specialties, forms and degrees of learning and propose the number of students to be enrolled;
5. Approve or change the qualification descriptions and curricula of training;
6. Determine the research policy of the higher school;

7. Determine the composition of the General Assembly and the procedures for election of its members;
8. Determine the personnel policy of the higher school;
9. Elect Deputy Rectors at the proposal of the Rector;
10. Make decisions about the participation of the higher school in associations between Bulgarian and foreign organizations;
11. Adopt the higher school budget;
12. Award the "Doctor honoris causa" honorary title;
13. Elect private professors and associate professors;
14. Adopt regulations for specific educational, scientific, creative or production activities of the higher school.

(2) At least three quarters of the members of the Academic Council shall have to be persons with high academic ranks.

(3) The Academic Council shall also include representatives of students, postgraduates, lecturers and employees.

(Higher Education Act 1995, Chapter 4, Article 30, Paras 1-3)

The Rector shall:

1. Represent the higher school;
2. Be a member of the Academic Council and its Chairperson ex officio;
3. Sign and terminate labour contracts;
4. Make the final decision on all matters related to the admission, leaving or transfer of students;
5. Prepare and propose for approval by the Academic Council the annual report of the higher school and publish this report;
6. Nominate persons for Deputy Rectors;
7. Perform other functions resulting from the decisions of the Academic Council or the General Assembly.

(Higher Education Act 1995, Chapter 4, Article 32)

2. Hungary

(1) The governing body of a higher education institution shall be the institution council.

(2) To the sphere of authority of an institution council shall belong:

- a) the deciding and sanctioning of the principles governing the activity of the institution, and the accepting of the developmental plan of the institution;
- b) the framing of the Regulations of the institution;
- c) the laying down and sanctioning of curricula;
- d) the laying dawn of scientific programs, and the evaluation of research results;
- e) the initiation of the mandating and dismissal of rectors and director-generals;

- f) the submission for appointment and dismissal of university and college professors;
- g) expressing opinions on: the mandating of vice rectors and deputy college director-generals; the mandating of heads of teaching, research, and other organisational units; the nomination of university and college readers; the nomination of the secretary-general and director (-general) in economics.

(3) The institution council shall decide on:

- a) the institution's budgetary proposals;
- b) the acceptance of the report concerning the implementation of the budget of the year preceding the target year;
- c) the principles governing the utilisation of the wealth resources;
- d) the proposals concerning the economic activity of the institution;
- e) the evaluation of the management of wealth in respect of the development of the whole institution;
- f) the establishment and termination of education, research and other organisational units.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 3, Chapter 13, Section 53, Paras 1-3)

- (1) At least one quarter, but at the most one third, of the members of an institution council shall be representatives of the students, and at least one third shall be representatives of professors and readers.
- (2) At a university, the chairman of the institution council shall be the rector; at a college the institution council shall be chaired by the director-general. Heads of faculties (deans, director-generals) shall be ex officio members.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 3, Chapter 13, Section 55, Paras 1-2)

To the sphere of the tasks and sphere of authority of the head of a higher education institution shall belong in particular:

- a) the direction of the educational, scientific research, artistic, administrative and economic activity carried on in the institution;
- b) the direction of personnel management, and the exercise of employer's rights;
- c) disposal, according to the legal regulations, over budgetary allocations, property and other resources at the disposal of the institution;
- d) the exercising of rights concerning publication and distribution of materials.

(Act LXXX of 1993 & Amendment Act LXI of 1996 on Higher Education, Part 3, Chapter 13, Section 57, Para 2)

3. Poland

The senate shall be composed of:

- 1. The rector as the chairman;
- 2. the pro-rector/s;
- 3. the deans;
- 4. the elected representatives, numbering as specified in the statute of the school, of:

- a) academic teachers employed in the posts of professors ordinary or professors extraordinary or holding a degree of doctor habilitated (over a half but not more than 3/5 of the membership of the senate);
- b) remaining academic teachers;
- c) student self-governments (together with 'b' not lower than 10 per cent);
- d) employees of the schools who are not academic teachers (not higher than 10 per cent).

The scope of competence of the senate shall be:

1. to determine general lines of the school's activity;
2. to organize and liquidate fields of studies at the request of the council of the faculty;
3. to award the title of doctor honoris causa;
4. to adopt resolutions on the material and financial plan of the school;
5. to decide on teaching load for certain posts;
6. to give consent to the acceptance of donation, the participation in partnerships, and establishment of foundations;
7. to evaluate the rector's activity and approve annual reports;
8. to adopt resolutions on other matters defined in the statutory law or the school's statute or requiring opinions of academic communities.

(Act on Schools of Higher Education 1990, Section 3, Chapter 1, Articles 47-48)

- (1) The rector shall manage the activities of the school and represent it outside. The rector shall be the superior of the employees and students.
- (2) The rector shall take all decisions regarding the functioning of the school.
- (3) The rector shall, in particular:
 1. make decisions regarding the school's assets and economic policy;
 2. supervise the school's administration and economic policy;
 3. issue organisational regulations of the school;
 4. take care of the observance of law, security and order on the premises of the school.

(Act on Schools of Higher Education 1990, Section 3, Chapter 1, Article 49, Paras 1-3)

Conceptions of governance of higher educational institutions in Croatia is presented in the paragraphs below:

Another important trend deals with the need for changes at institutional level: more precisely, towards greater autonomy and decentralisation of governing structures followed by greater degree of self-regulation. It means that institutions should become more responsible for their own survival, i. e. decision making should be transferred from the government level to the institutional level. What is expected from higher education institutions is that they are able to make purposeful, priority oriented, focused, and above all, better decisions than the government civil servants, far from science, research and education were able to make (Frackman, 1994). Changes in higher education policy world-wide have distinguished two extreme conceptions of governance during last decades: collegiality and managerialism. Traditional collegiality is characterised by participation of all academic staff in decision-making, or through representatives in relevant boards or bodies, which succeed to retain at universities for centuries. Managerialism emerged

strongly during 1980s and 1990s, in countries where market mechanisms in higher education have been introduced (Canada, UK, New Zealand, Australia). This conception, overtaken from business corporation practice, implies strong competition among institutions (for financial resources, students) and rapid institutional response to changing external demands. Decision making process is determined by dominance of small group of people on the top, assuming that quick decision-making process is needed in order to improve the position of HEIs in new, competitive environment. Slow, multiple layer and often very inert collegial bodies were supposed to be inadequate in new terms of university governance, which challenged new conceptions of governance. Analysing countries of Central and Eastern Europe, Sanyal noticed considerable lack of structural transformations inside HEIs: too much power is still concentrated on collegial bodies (Senates, Faculty Boards), with very weak executive level (Sanyal, 1995). Knowing the global trend of strengthening the role of rectorates and institutional management, it can be observed that role of the rector is particularly under-emphasised.

It would be wrong to conclude that universities, which are about to overtake market mechanisms in their everyday operations, should automatically overtake managerial mode of governance as a way of survival within a competitive market. Many different factors will influence processes of designing, adapting and applying adequate conceptions of governance. Regardless of common trend of introducing self-regulation of HEIs in many countries, adaptation processes inside academia will not occur following the equal patterns. Bearing in mind that different countries have widely differing starting points, and such consequential trends will naturally diverge into different directions according to the different country in hand, it should be emphasised that there is a need for a deeper understanding of the varying degree in particular starting points (Kogan, 1998). Some earlier researches, focused on organisational aspects of universities, have pointed on the importance of respecting basic characteristics of universities as organisations: knowledge as basic activity, traditional academic autonomy and freedom, ambiguity of individual aims and objectives, variety of roles and responsibilities of academics – are some of them which encouraged researchers to discuss the most appropriate models of institutional governance. Already classical examples, like *professional bureaucracy*, *collegiality*, *organised anarchy*, *cybernetic system* or *political model* of university – emphasised particularities of academic organisations, although some of them pretending on some distinguished segments of higher education policy, valid mostly in situation of relative stability and consensus (Lockwood and Davies, 1985; Walford, 1987). But, in time of rapid changes, jeopardised financial securities of universities, strong demands from external environment and conflicts inside higher education policy – university overtook features of complex and dynamic organisation and expressed the need for new conceptions of governance.

Acknowledging just two variables of stability and complexity, Santos, Heitor and Caraca (1998) have explored the evolution and changes of external environment of universities from their first appearance in Middle age until today, searching for factors which changed the nature of university organisation. Complexity was determined regarding the number and variety of environmental factors of relevance for universities: for example, number of institutions and clients whose needs should be considered; amount of knowledge needed for university operations (which determines divisions on disciplines and departments), and recently, nature of market in which the university operates. On the other hand, stability is determined by the degree and amount of changes in academic environment. Universities today, faced with problems of mass (even universal) approach, strong institutional and program diversification and fragmentation caused by the enormous growth of information and opening to new disciplines – require more complex profile of governance structure. It seems like authors don't favour neither of the two extreme conceptions of governance, recommending that each institutional level should develop different mode of governance, explaining this by different fields and types of decisions. They are pleading to "bottom-up" approach, emphasising critical importance of basic units (departments) as starting points of decision making processes where participation, democratic and decentralised still of management should be nurtured. However, authors made their conclusions based on ideal type of university, with no respect of the number of national, contextual and institutional specialities which influence on creation adequate conception of governance.

Elaborating individual factors, Currie (1998) emphasises the importance of basic contextual features of institution: size (number of teachers, students, programs, departments...), complexity (number and kind of councils, boards, committees, categories of students, stakeholders...) and previous conceptions of governance – as a base for understanding processes of institutional adaptation to new circumstances. Based on case studies of several Australian and American universities, where the strong trend towards

introducing managerial conceptions of governance is observed, a certain degree of alienation and dissatisfaction of academic staff related to administration is noticeable. This set of factors, (which can hold common denominator – relationship between academic staff and administration) has been also studied by Maasen and van Vught (1996). Investigating on the degree of centralisation/decentralisation of decision making processes considering certain fields of decisions (for example, electing top administration, hiring policy, setting priorities of fund-allocation, introducing new study programmes etc.) in different countries, they found significant indicator of non-participation in decision making from the side of academic staff. Although the variable of particular countries has been distinguished as statistically significant, most academics expressed the lack of their contribution on creating institutional policy as a negative aspect of governance. In his comparative study comprising of 14 countries, Altbach concretised particular aspect of this relation (Altbach, 1996). Although supporting previously mentioned findings, he also distinguished factor of considerable lack of interest from the academic staff to be involved in decision making processes. At the same time, (most) academics assessed the leadership in their institutions as incompetent. Bearing in mind that actual dynamics and complexities of changes in higher education tackle the issue of leaders' competencies, an important challenge for researchers would be to investigate deeper into these issues. Results of research overtaken by Mech (1997) provide some tendencies in this manner: based on typology of managerial roles of chief executive officers at American universities (for example, resource allocator, disseminator, monitor, entrepreneur, disturbance handler, figurehead, spokesperson, negotiator etc.), he discovered significant correlation between variables related to institutional size, range of control and financial situation of institution with certain categories of roles, i.e. degree of success in their fulfilling. Reasons for identified differences, claims Mech, lie also on personal characteristics and competencies of managers, so he points on the necessity of electing candidates according to possession of related skills and competencies needed for leading roles, not only those based exclusively on their academic achievements. Green investigated on ways in which leaders of HEIs have been prepared for their most relevant leading duties: she concluded that academic community doesn't pay enough attention about their adequate preparation. Stressing the point that academic leaders are, basically, products of certain periods of time, culture and organisation, she advocates contextual nature of their activities and stresses the importance of further developing their competencies in order to fulfil their duties adequately in given wide context. It is a paradox that there is a need to prepare leaders of certain institutions (banks, for example), but no need to prepare leaders of complex organisations as universities. Certain regularities can be observed by investigation on interrelations between kinds of changes (crises) confronted by institution and ways particular institution responded to these changes. Clark (1998) analysed several cases of entrepreneurial universities, so he discovered some common features of these institutions which, by adopting entrepreneurial ways of functioning, assured their existence and consolidated their position in society and economy. They were mostly small, marginal, specialised and focused in their field (mostly from natural or technical sciences), often situated near some bigger industries – having reacted on serious financial crises resulted from the need to search for alternative funds to assure their basic activities. Strong managerial leadership, strong institutional periphery, sensibility on external needs and changes together with the entrepreneurial spirit of academic staff can be summarised as results of institutional adaptation to new circumstances. Sporn came to similar conclusion in her study aimed on identification of factors which facilitate or impede successful institutional adaptation to new demands (Sporn, 1999). Analysing carefully selected cases of universities in several countries, with the special attention on their particular features (institutional type, comprehensive vs. specialised; type of changes and environmental challenges they faced; geographical location; source and way of funding; programme structure of teaching and learning), she concluded that professional management, collegial governance structures, proactive and strong leadership oriented on changes, clear and generally accepted institutional mission, entrepreneurial culture and dedication of academic staff in basic units are forming the most important group of factors for successful institutional adaptation. On the other hand, tight dependency on resources, rigid legislative regulations, culture of resistance, unclear institutional mission and low integration inside the institution will make this process more difficult and slow. Besides that, the author is stressing the importance of understanding particular organisational culture, which will influence on creating adaptation processes. For example, it is important to understand traditional influence of particular leadership position on decision making process, which can help in prediction of future role which this position can play in governance structure.

Although several lessons can be learnt from previous analysis, some open questions and problems can be identified. Majority of researches has emphasised social, political or economical aspects, but very little attention is given on basic (pedagogical) function of universities – production, dissemination and preserving of knowledge. There are no many indicators which point that several conception of governance has influenced on improving quality of teaching and learning in higher education. Phenomenon which can play the most prominent role in this context is certainly quality assurance system. Fashionable trend towards uncritical implementation of some foreign (particularly American or British) models should be replaced by more careful approach to its design so as it fits into particular national and institutional context, with the special emphasis on understanding its main purpose. Supporting the attitude towards overtaking the proactive role of universities in creating system for assuring quality of their basic activities, primarily oriented on improvement, it is obvious that reflecting on adequate conceptions of their governance should also assume finding solutions for overtaking proactive care about quality.

This issue remains open at the academic scene. Majority of researchers who tried to relate concept of quality with the institutional organisation and governance have started from analysing TQM (Total Quality Management) approach (Dill, 1995; Harvey, 1995; Billing, 1998; in Croatia: Ledi_, 1995). Although application of this approach in higher education attains several successes and improvements, there are several difficulties in academic structures which make this application problematic: non acceptance of entire TQM philosophy is the most discernible. Recently, researchers' attention was captivated by two conceptions assumed to be more appropriate when applied in academic environment: "learning organisation" and "new collegiality". University as a "learning organisation" is accepted to be among the most successful conception overtaken from business. It emphasises that the crucial ability of an organisation is to adapt to the rapidly changing environment of the contemporary world and to anticipate the future (Mead, 1998) and that the only sustainable competitive advantage, especially in knowledge-intensive industries can become the rate at which individuals and organisations learn (Stata, 1989). On the other hand, there is the idea of "new collegiality", as a cleverly rethought adaptation of traditional features of collegial governance to new academic circumstances. Both conceptions presume importance of observing the organisation from the outside, responding on changing demands and circumstances, looking at collegial group as a forum for decision making – open for discourses and discussion with other relevant groups, including students. They emphasise professional accountability and co-operation with the elements of shared responsibility for quality and team work, constant improvement through existing academic framework, free approach to information, common acceptance and fulfilment of institutional mission (Harvey, 1995; Elton, 1996; Smith and Taylor, 2000). The "learning organisation" as a self-regulating organisation with strong leaders and engaged staff members is often launched as the ideal model of institutional governance and also adopted by many national agencies and international evaluation bodies as a norm against which the institution and their quality work are evaluated (Askling and Kristensen, 2000). Designing adequate conceptions of HEIs governance according to the model of "learning organisation" sounds challenging in current circumstances, however, final product can be just a variation adapted to peculiarities of the system in which it should be implemented.

Respecting all factors identified as significant for adequate process of adaptation to new changes and external demands and analysing their position in our academic context, it will be possible to discuss about necessary changes in our universities in order to improve towards introducing internationally recognised and comparable higher education system. What remained unknown were these set of factors which should influence on forming and developing adequate conceptions of governance, and which are mostly concerned with the happenings inside institutions. This set of factors, dealing mostly with the academic staff themselves, have been often neglected in researches on higher education governance. "*Quotation from the Croatian paper presented at HERN Seminar 4, Sofia, January 2003.*"

A very interesting approach has been applied in HEIs in Latvia.

The present situation in universities could be characterised as follows:

Rapidly growing number of students,

Recent dramatic changes of economic environment,

Vague development goals,

Formal understanding of quality issues in running quality procedures,

Barriers among university institutions weakens interdisciplinary research,

High costs and rapid outdateding of training equipment,

Unclear understanding of free market forces in education.

It creates difficult conditions for management. Moreover, the managers are often academic persons without broad scale management experience.

In addition, business demands that universities are in top-notch running order before they will invest in large scale research projects.

Therefore, transition to knowledge society is the new opportunity for university development and also for university governance. Introduction of up-to-date pedagogical methodology and learning technology in traditional universities, as well as modern management tools is of utmost importance for successful development.

The e-learning and knowledge management are among the most rapidly developing disciplines in recent years. Additionally, the development results directly influences and accelerates the activities in other research areas. Many early innovators among academics are working in these fields in distance learning study centres.

Although e-learning and knowledge have taken different paths in development, there is lot they share in common. Regardless of whether you are developing e-learning at an university or in a company, e-learning will certainly benefit from the knowledge management field and vice versa. A proper combination and application of these fields can tremendously raise accessibility to knowledge and improve skill acquisition process in any organisation.

E-LEARNING DEVELOPMENT APPROACH

In order to design a set of university development priorities corresponding to the needs to transfer to a knowledge society the academics and administrators from four Latvian universities carried out the study of possible university co-operation for more effective development of modern e-learning.

The e-learning development approach was used because it is:

it has official political recognition on the highest levels both nationally and internationally, there are a number of successful and visible e-learning development and delivery projects in Latvia (Riga Technical University has participated in about 20 international projects during the last 5 years),

most academics accept e-learning as interesting, but it is as yet only marginally implemented in university,

high quality e-learning development is expensive – an additional motive for cooperation, all international e-learning development projects are run in collaboration with a number of organisations.

ENTERPRISE KNOWLEDGE DEVELOPMENT APPROACH

Our team used the Enterprise Knowledge Development (EKD) approach. We previously tested it when Riga City Council participated in the 5th Framework programme project HyperKnowledge IST-2000-28401 (Hypermedia and Pattern Based Knowledge Management for Smart Organisations).

Following Enterprise Knowledge Development (EKD), is an approach that provides a systematic and controlled way of analysing, understanding, developing and documenting an organisation and its components, by using Enterprise Modelling. Basic contents of the EKD framework include: a set of description techniques, explanation of stakeholder participation and a set of guidelines for working. EKD application process is supported by a set of software tools.

Organisational patterns (solutions) identified using EKD modelling essentially are generic and abstract organisational design proposals that can be easily adapted and reused.

These represent solutions to specific problems within the context of an organisation, problems that are important and recurring in a variety of cases. Each pattern couples a problem with a solution, reflecting the context and the way in which the pattern can be applied.

MODELLING OBJECTIVES FROM A GOVERNANCE PERSPECTIVE

“Today's organisations need to cope with rapidly changing business environment, customer demands, stiffening competition, as well as information overload. They should also maintain high levels of innovation in their business and products. In order to adapt to the changing business environment organisations have become increasingly flexible and efficient. Among the main driving forces in this process are people and their knowledge. Organisations need to utilise this knowledge in the most efficient way since, in essence, it is the source of their competitive advantage. It is therefore that managing experience, competence, knowledge about business processes, organisational practices, best business practices are so important.”

The project idea was to design a set of models starting with goal models. After completing the models design we intend to analyse the results from a governance perspective and identify the modelling results from this perspective as well.

(Quotation from the Latvian paper presented at HERN Seminar 4, Sofia, January 2003).

In Sweden the organisational structures at institutions of higher education are as follows.

Given that the Parliament and Government decide on the goals and the objectives as well as the legal and economic framework of higher education and research the universities and the university colleges can make their own decisions. *The most important issues* institutions are responsible for are:

- The internal organization – the division into departments etc, the decision-making bodies, and their composition
- The principles for the internal allocation of resources, the annual budget, and the budget follow-ups
- The quality of teaching and research – quality assurance and quality enhancement
- The organizing of undergraduate education, the design of study programs, and the contents of courses
- The provision of and the dimensioning of study programs and courses
- Principles of admissions procedures and admission decisions for undergraduate education
- Postgraduate education – subjects, admissions, and organisation of courses
- The establishing of chairs and appointments of professors (with a few exceptions)
- Methods used in research and focus of research
- Volume and focus of contract teaching and research
- Premises and investment in furniture and equipment
- Salaries for everybody except the vice-chancellor (the president)

Governance at the local university level

Each institution of higher education has a *board of governors*. The Government appoints the Chair of the board who is not employed at the institution of higher education in question. The board is composed of the Chair, the Vice-Chancellor (President) and no more than thirteen other members. The Government appoints the majority of the members of the board of governors. The representatives of the teaching staff are chosen by election with in the institution of higher education. The students have the right to be represented by three members. Employees representative have the right to attend and to speak at board meetings.

The Vice-Chancellor is nominated by the board and employed by Government decision for no more than six years. Other board members are appointed for a period of not more than three years. A Pro-Vice-Chancellor is the Vice-Chancellor's deputy. More than one Pro-Vice-Chancellor may be appointed. An institution of higher education may also appoint Pro-Vice-Chancellors with responsibility for parts of its operations. Faculty board

Institutions of higher education, which have been given the right to award doctoral degrees shall have at least one faculty board. If an institution of higher education should not create specific decision-making bodies for undergraduate education, the faculty boards are also to be responsible for the undergraduate education carried out in their area of study. The Dean of Faculty is the Chair of the faculty board. In decision-making bodies created for matters of research and undergraduate education, the teaching staff is always to have the majority. The students have the right to be represented by at least two members on the faculty board and on other bodies dealing with educational matters.

(Quotation from the Swedish paper presented at HERN Seminar 4, Sofia, January 2003).

Issues of HEIs in the UK

The impression given by the White Paper is that higher education in the United Kingdom is homogeneous. The merging of the Polytechnic and University sectors in 1992 created just over 100 universities² but there are also a number of Colleges of Higher Education (some of which have since become universities) offering courses at both Degree and sub-Degree level³. These higher education institutions are part of the unified HE sector alongside the universities (educating 7% of all HE students in the UK), and are subject to the same quality assurance and public accountability processes. Many HE colleges are specialist institutions, concentrating on particular subject disciplines, including art and design, music, drama and the performing arts, education and agriculture. HE colleges are also major providers in the health professions and other professional/vocational areas. Some Colleges of Further Education also receive HE funding for those courses or elements of courses that they provide at Degree level (though they do not have Degree awarding powers and so work in partnership with institutions that do). There are also a few higher education institutions that do not receive state funding.

Issue: University governance is driven by the demands of these very powerful stakeholders. The greatest need is to ensure that the institution has the required structures, procedures and instruments in place. The interests of other stakeholders, such as students, staff or the local community, are subordinated.

Issue: the implication appears to be that government will take a closer interest in *how* individual institutions are managed as well as judging them against the existing performance indicators. While it is unlikely that government will prescribe forms of governance though that should not be ignored as a possibility) it seems likely that it will be more ready to intervene directly in institutional governance if it judges an institution to be 'failing'.

Issue: There is a significant opportunity implicit in this provision that would allow HEIs explicitly to target particular markets that themselves already take a market view of the HEIs. The problem is that the provision of the clause regarding access shows that the government wishes to retain some control over the market responses of HEIs through the proposed Access Regulator. This may act positively to ensure market responsiveness with a commitment to social inclusion. In practice it is probable that HEIs with a student body which is deemed inclusive will have less of a problem with the regulatory mechanism and so be freer to respond to the market. That may give them a competitive advantage. More likely, though, that the most favoured HEIs will work hard to satisfy the regulator by creaming the most able of the disadvantaged students and then use the full power of their reputation to compete in the market.

Issue: It is clear that HEIs will (initially at least) have considerable freedom in deciding fee levels for various courses. But, the tenor of the government's proposals is that some of the cost of HE is transferred from the state to the student. The implication must be that fee levels and course resourcing are directly linked. Unless other forms of external funding can be obtained low fees would not be attractive unless differential pricing of similar courses were to be used. This may facilitate creative marketing – or simply add another level of difficulty to course funding.

Issue: HEIs are being offered an additional 'product line' and for those institutions that view higher education as being concerned with meeting externally derived 'needs' then it is likely that they will be aided in building the links with industry that the 'reach-out' objectives expect. There is, however, a section within HE that views intrinsic, subject-oriented goals as being the purpose of higher education and some HEIs may find that 'reach-out' may be opposed.

The major issue that is likely to be faced by other HE systems that are following the UK's example is the increase in state intervention. It is impossible now to contemplate university autonomy in the UK. It is equally difficult to envisage a university system in the UK being able to widen access without very considerable external pressure being applied. (*Quotation from the UK paper presented at HERN Seminar 4, Sofia, January 2003*).

Accreditation of higher schools

Reasons for accreditation

Accreditation has come into force in Eastern and Central Europe since 1993. There are three main reasons for accreditation:

Establishing private universities and colleges and the necessity of assessment of their education activities.

Opening new faculties, departments and programs at state universities.

The efforts of the East and Central European countries for equalization of the quality and standards of their education with those of the member-countries of the European Union.

General features of accreditation

Accreditation is considered as one of the most important ways of guarantee for quality of higher education.

Accreditation covers all programs of universities and colleges leading to all levels of academic degrees.

Accreditation is connected with the state finance of higher education and the prestige a higher school has got in the given country.

Accreditation usually concerns much more private higher schools than state ones.

Accreditation is performed by national accreditation agencies (committees) which are specialized governmental authorities.

Accreditation is valid for five to eight years in the different countries.

Each new education unit or program of private or state schools must apply for accreditation.

How accreditation is treated

There are not any serious differences in the content, subject and functions of the

accreditation process in the different countries. That is why, two examples only, those of Bulgaria and Hungary, will be given here. Bulgaria is my native country and accreditation has been a much topical process recently, and according to my private opinion Hungary has got the best chapter on accreditation in its higher education act.

1. Bulgaria

The National Evaluation and Accreditation Agency at the Council of Ministers shall be the specialized governmental authority for quality assessment and accreditation of higher school activities.

(Higher Education Act 1995, Chapter 2, Article 11, Para 1)

Accreditation shall be the recognition of compliance between the activities of a higher school, its main structural unit or specialty thereof and the state requirements.

(Higher Education Act 1995, Chapter 10, Article 75)

The National Evaluation and Accreditation Agency shall:

By its rules, develop and update criteria and standards for accreditation, while observing the requirements of this Act and the state requirements;

Develop and approve the procedures and documentation for the accreditation process;

Evaluate projects for the establishment or transformation of higher schools, faculties or specialties thereof;

Assess the condition and activities of higher schools, their faculties and specialties on the basis of which accreditation shall either be given or refused;

Establish and maintain an information system with data about accredited higher schools, faculties and specialties.

(Higher Education Act 1995, Chapter 10, Article 76)

(1) The managing bodies of the National Evaluation and Accreditation Agency shall be the Accreditation Council and its Chairperson.

(2) The Accreditation Council shall establish expert committees for implementing evaluation and accreditation functions.

(Higher Education Act 1995, Chapter 10, Article 77, Paras 1-2)

The Accreditation Council shall:

Make decisions to initiate evaluation or accreditation procedures;

Define the assignments and membership of expert committees;

Approve the reports of the expert committees and make accreditation decisions;

Advise the Ministry of Education and Science of the completed evaluation and accreditation procedures;

Adopt the regulations of the National Evaluation and Accreditation Agency and submit them for approval to the Council of Ministers.

(Higher Education Act 1995, Chapter 10, Article 80)

(1) Expert committees shall prepare and submit for approval to the Accreditation Council a report about the results of each evaluation or accreditation.

(2) The report shall include information on and evaluation of:

The objectives of the higher school, of its unit or individual specialty;

The school documentation;

The academic staff;

The physical and information maintenance of learning process;

The examination procedures and criteria for enrolment, evaluation and graduation of students, postgraduates and trainees;

The system of selection, evaluation and assessment of lecturers, academic staff and researchers;

The research activities at the higher school or its main units;

The abiding by academic freedoms;

The conformity of training with the state requirements.

(Higher Education Act 1995, Chapter 10, Article 82, Paras 1-2)

(1) The accreditation shall be valid for five years. Higher schools which shall not have participated in an accreditation or evaluation procedure for five years shall not be entitled to state subsidies or any other funding by the state.

(2) Public higher schools which shall have participated in an accreditation procedure resulting in negative answer, as an exception and at the proposal of the Council of Ministers may receive a one-time state subsidy.

(Higher Education Act 1995, Chapter 10, Article 87, Paras 1-2)

2. Hungary

For the ongoing supervision of the standard of education and scientific activity in higher education, for the perfecting of classification there, and for the supporting of quality assurance, the Government shall create the Hungarian Accreditation Committee.

The members of the Hungarian Accreditation Committee and the president shall, at the submission of the Minister of Education, be mandated by the Prime Minister for three years. An International Advisory Body may operate besides the Hungarian Accreditation Committee. The Hungarian Accreditation Committee may establish subcommittees, inviting also outside members.

Rules governing the organization and operation of the Hungarian Accreditation Committee, and the accreditation procedure, shall be established in a Government decree.

(Act LXXX of 1993 & Amendment Act LXI of 1996, Part 4, Chapter 19, Section 80)

The Hungarian Accreditation Committee shall:

assent to doctoral programs, and decide as to the areas and branches of knowledge in which a university may conduct doctoral education and adjudicate doctoral degrees;
adopt a standpoint on matters that involve the quality of higher education during the execution of this Act.

At the request of the Minister of Education, the Council or a higher education institution, the Hungarian Accreditation Committee shall express an opinion concerning the establishment or recognition of a higher education institution or higher education association;

the establishment or recognition of a faculty

the qualification requirements;

giving permission to start a major in graduate or specialised postgraduate education;

the doctoral or habilitation regulations of a university;

the regulations of the application of the credit system;

the operation of a foreign higher education institution in Hungary;

the drafts of international agreements on the nostrification and equivalency of degrees.

The Hungarian Accreditation Committee, at the request of the higher education institution, may participate in the nomination of the outside members in doctoral examination and habilitation committees.

Regularly, at least every eight years, the Hungarian Accreditation Committee shall assess the standard of education and scientific activity in higher education institutions.

(Act LXXX of 1993 & Amendment Act LXI of 1996, Part 4, Chapter 19, Section 81)

Finance of higher education

Sources of finance

The financial sources are defined in various ways but we can outline three main sources:

state budget;

donations, inheritance, sponsorship;

own revenues from tuition fees, research, services, products, etc.

The state budget is the main source for state higher schools. The share of the above mentioned sources in the case of private higher schools vary in accordance with their schemes of finance.

Three examples, of Bulgaria, Hungary and Poland, are enough to give a clear picture of the sources of finance of higher education.

1. Bulgaria

The revenues of higher schools accumulate from:

state subsidies;

financial assistance from local governments;

donations, inheritance, sponsorship;

own revenues from:

research, consultancy, creative, therapeutical and sports activities, as well as industrial

property rights, copyright and other related rights;

approved term tuition fees;

postgraduate training;

activities related to the learning process.

2. Hungary

The sources for higher schools to fulfil their tasks are:

support from the state budget;

other sources originating from the sub-systems of the state budget;
fees for services provided, other charges to students, tuition fees and other fees;
income from basic and from entrepreneurial activities;
income from donations and other income, and foundation sources;
fiscal means being at the disposal of such purpose.

3. Poland

Higher schools may obtain financial means from:

the state budget;

budgets of communes or their unions;

donations, legacies, inheritance as well as public generosity, including foreign ones;

other sources, particularly from the following:

activities in the field of research, diagnostics, health care, rehabilitation, arts, sports and experimental research;

tuition fees, except for teaching, classes on regular daily studies in state schools of higher education;

separate economic activity;

participation in activities of economic subjects.

The state budget usually provides subsidies for:

maintenance of the learning process, including staff salaries;

research;

financial support of students and postgraduates;

capital investment.

Common principles of finance of higher schools

The following common principles of finance can be extracted from the higher education acts and their application in practice:

Public higher schools draw up, implement, strike a balance and report their own budgets.

The Academic Council (Senate) approves the budgets of the higher school main units within the framework of the general budget.

Budget expenditures are drawn up in accordance with the classification of expenditures in the state budget.

The surplus revenues at the end of the year are transferred as cash availability in the higher school budget for the following year.

The maintenance of the learning process is specified on the basis of:

the differentiated rates per student as approved by the Government;

the number of students and postgraduates whose studies are financed by the state;

the results of the evaluation of the higher school, its units and specialties.

The basis for the calculus of allocations to each unit and school is the state budget percentage per student in respect of level and specifics of training, and of other indicators specific for education, especially those concerning the quality of education.

The funds for research are determined as a portion of the total maintenance of the learning process.

Higher education is allocated a distinct research fund from the aggregate research budget.

Funding for research is allocated on competitive criteria and depends on national priorities, and past or expected performance. The competition for research finance is open to all accredited higher schools.

Students and postgraduates are entitled to receive loans for paying tuition fees and for supporting themselves under terms specified by law.

Public higher schools meet the food, accommodation and transport costs incurred by the students practical activities away from the university centre.

Full-time students of public higher schools qualify for merit scholarships and study scholarships.

Students and postgraduates are eligible for many social benefits.

Financially, academic autonomy is the right to manage budget allocations or funds from other sources, including revenue in fees denominated in foreign exchange charged on foreign students on criteria determined jointly with the Ministry of Education.

A non-state higher school may receive state financial support. In this case, using up state support may be checked by the state.

The following description shows the development of HE finance in the Czech Republic.

The state power was limited to the minimum by the provisions of the higher education act from 1990 which prescribed that the state represented by the ministry of education was responsible for the allocation of the state budget and the co-ordination of the higher education system development. Thus, the state was allowed to influence higher education institutions only indirectly by means of the allocation of the state money.

The incremental rules were used before 1990. At that time it was obvious that this financial mechanism strongly influenced by many political side aspects did not serve to the real needs and requirements of the institutions. The higher education act dealt with the economic questions of higher education institutions only in a very non-explicit outline: The higher education institutions were according to it financed from state resources. At the same time it was permitted to acquire means for their activity from other sources and carry on economic activity.

In 1992, in principle on the basis of the ministerial decision, the formula based funding was introduced. The basic part of the contribution for an individual institution was fixed according to the input formula (the number of students multiplied by the cost of study). The further part of the contribution (introduced one year later), amounting to 10-15% of the total volume of means, was meant for the motivation of the research activity of the institution. Only a relatively small part of the contribution was not allocated on the formula based components (other budget components) - for example contribution for students' accommodation and boarding. During the time the percentage of the other budget components as well as the research-devoted money from the overall budget were increased. In any case - the all general positive but also negative aspects of the input performance based formula funding has occurred during the time of the distribution of the largest amount of money on its basis. The decisive power of the ministry related to the main part of the budget was not too high. In fact only two main parameters, which could be influenced significantly, were the cost of study and the number of students. Both of them were the basic issue of a lot of debates and complaints.

It was agreed that the amount of the means from the state budget to the appropriate higher education institution became fixed by the mechanism of mutual agreement between the Council of Higher Education Institutions and the ministry of education. This decision was made in accordance with the act, which obliged the ministry to discuss all-important measures related to higher education with the Council. It was formed so-called Representative Commission composed from the representatives of the ministry, Czech Rectors' Conference, Council of Higher Education Institutions and registrars of higher education institutions. The debate and the final decision of the Commission dealt with the cost of study of particular study field (there was 7 categories of them) and with the number of the new entrants. In fact there has been no numerus clausus in the Czech Republic and a higher education institutions have been responsible for the determination of the number of the accepted students. The debate of the Commission was devoted to the problem how big the increase of the new entrants could be acceptable taking into account the whole amount of the state budget for the current year (too many new students might cause the unacceptable decrease of the cost of study). The establishment of the Commission was considered as the very positive aspect of the governance, which prevented the ministry from the arbitrary decisions.

(Quotation from the Czech paper presented at HERN Seminar 4, Sofia, January 2003).

Prognoses, challenges, recommendations

Some prognoses by countries

Bulgaria:

Increasing the functions of the Government in the management of higher education.

Reducing the state funding of higher education and at the same time increasing the state financial control. (It seems that the current Bulgarian government follows the principle: more management powers over higher schools and less funding to them.)

Inner-university centralising the finance and no financial autonomy of faculties and departments.

Increasing the role and prestige of private higher schools.

Attempts to reducing the number of higher schools through transforming some of them. Warm contradictions between the Government and the Ministry of Education (its Higher Education Division) on the one hand, and higher schools' managing bodies and the University Rectors' Council on the other hand should be expected.

Adopting by the Parliament of new amendments to the Higher Education Act.

Hungary:

Increasing the functions of the Government in the management of higher education but not to such an extent as in Bulgaria.

Improving the links between research at higher schools, policy-making and financing.
Intensifying the differences between university and college education.
Enlargement of the role of non-state universities and colleges.
Increasing the number of programs in foreign languages.

Poland:

Reducing the fragmentation of higher schools.
Making their internal structures more flexible.
Mouldening the collection of higher schools into a coordinated system composed of interacting elements.
Modernization of higher vocational schools as a very important sector of the higher education system.
Determining principles of conferring academic degrees and titles, academic career planning to facilitate exchanges of cadres between business and higher schools.
Enlargement of the responsibilities of the Central Council of Higher Education.

Romania:

Changing the relationships between the Government and universities, emphasising academic freedom and university autonomy, decentralised management, and taking the advice of the academic community.
Stimulating competition between higher schools.
Creating new non-governmental academic bodies that will act as mediators between the Ministry of Education, higher schools and the academic community.
Financing according to market mechanism which is facing a period of fiscal austerity.
Developing the role of the Master's degree as an intermediate link between the Bachelor's and the Doctoral degree. The Master's degree will aim a particular specialisation, associated with the theoretical and methodological expertise needed for research abilities.

Czech Republic, Slovakia, Latvia, Lithuania, Estonia, Russia:

Decreasing the role of the Government in the management of higher education.
Overcoming the negative influences of the financial crisis on higher schools.
Determining in details the future state needs for specialists of different qualification levels.
Better provision of conditions for the development of the private higher education sector.
Introducing a new system of methodical and informational maintenance at higher schools.
Attempts to reducing the number of higher schools through transforming some of them are expected in almost all CEE countries.
In some countries (typically in Bulgaria) colleges will gradually disappear from the system of higher education. In other countries (Hungary, Baltic countries) colleges will increase their role and prestige.

Some challenges to the countries of East-Central Europe

Improving the funding of higher education and more cost-effectice spending.
Professionalisation of higher schools' administration.
Introducing new principles for creating programs of studies permitting a comparison of the knowledge acquired and the continuation of studies in different departments or differerent schools without losing a year (so-called credit system). This will make easier the foreign exchange of students.
Reformation of complex research on the problems of higher education.
Enhancing the prestige of academic teaching work at higher schools.
Increasing the effectiveness of research at higher schools.
Preparing sets of legislation intended to prescribe the future of national higher education, including the most significant provisions reflecting and then setting into motion the innovative ideas of the further development.
Further aiming at the title of "learning societies".
Proving in practice that the countries of Eastern or Central Europe can achieve the quality of West European higher education disposing of much less finance and worse conditions than the West European countries.

Some recommendations

States and institutions will have to think deeper of employment/unemployment of HE graduates - but this is directly connected with the trends mentioned above.
Understanding of HE as a life-long learning process to be accepted in all CEE countries.
Because of the large variety of schools and programs more efficient systems of monitoring and assessment of quality and effectiveness of HE will be tested and implemented.

The e-learning development approach will be used more actively and its functions will be enlarged.

"The Knowledge Society" is still just a title and idea in most of CEE countries. However, the competition with the West European countries will require this idea to be put into practice and to be fulfilled with concrete acts.

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Figures

<u>Figure 1</u>	Bulgaria:	Functions of the State in managing higher education
<u>Figure 2</u>	Hungary:	Functions of the State in managing higher education
<u>Figure 3</u>	Poland:	Functions of the State in managing higher education
<u>Figure 4</u>	Romania:	Functions of the State in managing higher education
<u>Figure 5</u>	Russia:	Functions of the State in managing higher education

Signature: Nikolay Popov

Annex 2

DELIVERABLE N° 37

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton

Reference period (see technical annex): from 1 Nov 03 to 30 Apr 04

Date of issue of this report: 30 April 2004

Deliverable 37

Brief guide to policy 'Internal Management, gender, staff development in HE in the context of reform and EU Enlargement'

(PROGRESS REPORT)

Deliverable 37 remains outstanding despite frequent reminders. A major factor is that the original Swedish partner involved in this workpackage dropped out and KTH stepped in at the last moment even though they do not have the skills and expertise in this workpackage's area of work. All the other deliverables in this workpackage have been produced:

D22 - A one-day seminar on Addressing inequalities of gender participation in institutional decision making systems and a steering group meeting.

D24 - Linked eForum and report of website discussion

D27 - Conference paper on 'The position of women in HE and implications for wider society'

It will be seen that the seminar and conference paper each cover a proportion of the policy area but the policy deliverable appears to go further than either. The expertise was much more heavily weighted towards gender issues and less on management and staff development. This caused the partner considerable problems in trying to structure the policy paper. The person who had lead the topic earlier, a respected authority on gender issues, had encountered family problems that meant she was not able to devote so much time to the project. Equally, other academics who had been involved were very busy and the Swedish partner, unable to give clear guidance, asked for advice. The advice given by the project manager was (inter alia):

"...The workpackage title was "Addressing inequalities of gender participation in institutional decision making systems" and the key objectives were:

Objective 1: To explore some of the tensions between institutional change, the position of women in HE and impact of this on the development of women's roles in wider society

Objective 2: To exchange and integrate different theoretical frameworks in relation to gender and institutional change in different national contexts

Objective 3: To explore the implications of different institutional behaviours on staff development for women in HE

In order to provide policy makers (and others) with comparative, conceptual frameworks (historical, social and political contexts) for gender perspectives in HE internal management and gender issues in relation to governance and HE.

If I remember correctly the seminar did address objective 1 in detail, though I am not sure that objectives 2 and 3 were so fully. Frankly, in the time available I think these objectives are far too ambitious as they stand but if one takes a pragmatic view they can be reformulated as:

1. To report the impact of changes in the nature of HE and of women's roles in the wider society and the position of women in Higher Education
2. To report the differences in national approaches to gender issues in the context of change in HE
3. To identify ways in which staff development may promote positive change in gender related issues

As I recall, the seminar did reach some broad conclusions in these areas. I would further consider sharpening the objective of the policy document as being "to provide policy makers (and others) with guidance on how HE governance and internal management processes (taking into account the variety of historical, social and political contexts) should change to adopt a common, EC-wide conceptual framework for recognising gender perspectives and addressing gender issues in HE".

As I remember, we had case-studies of the situation in Sweden, Greece, Bulgaria, UK, Poland and Latvia. From these it was clear that nowhere is there complete equality of opportunity: but it varies from country to country for reasons rooted in customary behaviour that may be resistant to legal/bureaucratic influences. Therefore, policy guidance ought to consider how personal behaviours can be changed by positive actions. It would be advisable, too, to consider whether the culture of some subjects is not adversely gendered (engineering-male/nursing-female) and how that might be changed as well as considering whether the changing demographics of HE (50% female students now) will have any impact, longer term.

This appeared to help the partner but the colleague best suited to producing the deliverable was in the USA and so the deliverable could not be produced in this period.

Delivery has been proposed for mid-June 2004.

Annex 3

DELIVERABLE N° 38

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton

Reference period (see technical annex): from 1 Nov 03 to 30 Apr 04

Date of issue of this report: 30 April 2004

Deliverable 38

Brief guide to policy 'Relations with the State and quality in HE'

(DRAFT)

Importance of QA in the context of the Bologna process

Quality assurance in higher education is one of three cornerstones of the Bologna Process (so-called 'golden triangle': QA, ECTS and 2-level system of studies). The Berlin Communiqué (2003) states:

"The quality of higher education has proven to be at the heart of the setting up of a European Higher Education Area. Ministers commit themselves to supporting further development of quality assurance at institutional, national and European level."

They stress the need to develop mutually shared criteria and methodologies on quality assurance. They also stress that consistent with the principle of institutional autonomy, the primary responsibility for quality assurance in higher education lies with each institution itself and this provides the basis for real accountability of the academic system within the national quality framework.

Therefore, they agree that by 2005 national quality assurance systems should include:

A definition of the responsibilities of the bodies and institutions involved.

Evaluation of programmes or institutions, including internal assessment, external review, participation of students and the publication of results.

A system of accreditation, certification or comparable procedures.

International participation, co-operation and networking.

At the European level, Ministers call upon ENQA through its members, in co-operation with the EUA, EURASHE and ESIB, to develop an agreed set of standards, procedures and guidelines on quality assurance, to explore ways of ensuring an adequate peer review system for quality assurance and/or accreditation agencies or bodies, and to report back through the Follow-up Group to Ministers in 2005. Due account will be taken of the expertise of other quality assurance associations and networks."

Previous and present QA initiatives at the European level

In the last decade there have been several large-scale European QA initiatives. The European Pilot Project for Evaluating Quality in Higher Education, initiated in November 1994 by the European Commission, Directorate General XXII: Education, Training and Youth and finished in December 1995, gave a general overview of existing national QA systems and a comparative analysis of QA for several study areas. The methodological framework in the form of the guidelines for the project was tested and received general support, the relevance and intensity of collaboration made possible during the project was recognized by all participants and support for further cooperation was expressed. It has been also concluded that

the interpretation of the various elements of the methodology must necessarily be adapted to the educational structures and national institutional and academic cultures in the different countries

the evaluation methodology must reflect the context in which it is being used.

In 2000 the European Network for Quality Assurance in Higher Education (ENQA) was launched by the European Commission to co-ordinate activities of European QA and

accreditation agencies. It is now perceived as the main body responsible for European QA policy. A series of reports concerning inter alia quality procedures in European higher education, benchmarking in higher education, quality assurance implications of new forms of higher education, institutional evaluations in Europe, has been prepared and disseminated. ENQA coordinates also projects dealing with specific QA issues, such as Transnational European Evaluation Project (TEEP) testing a method for transnational external evaluation evaluation in three disciplines (Physics, History, Veterinary Science).

To assist countries of central and eastern Europe in their preparation for accession to the European Union, the project Quality Assurance in Higher Education in the framework of Phare Multi-Country Programme in Higher Education was realised in 1997-98. It promoted quality culture and offered guidebooks on QA for CEE countries. A set of recommendations for ministries, agencies and higher education institutions has been elaborated (cf. Appendix A).

Objectives and methodology of HERN analysis

If so many quality-oriented initiatives have been already realised, what is the added value of research conducted by HERN? What does HERN offer is a multi-dimensional approach and synergy with other issues. The network explores the following four domains:

Society: in terms of underpinning European values in each country;

Governance: in terms of institutional management and decision making;

Teaching and learning: in terms of new developments in different countries;

Managing change: in the context of European enlargement.

Quality issue is present in all four domains:

- **Society:** accountability issue and promotion of citizenship values as a quality factor;
- Quality of **governance**, relationships quality-innovation;
- Quality of **teaching and learning**;
- Quality as a main driving force for **managing change**.

HERN creates opportunities for the cross fertilisation of ideas and development of new research partnerships through a series of thematic seminars.

According to HERN methodology, the issue of quality and accountability was considered in the wider context, taking into account not only the main stakeholders (State and Academia), but also 'hidden variables of QA', the relationships of QA with gender issues, equal opportunities, promotion of responsible citizenship etc. The ultimate aim was to formulate precise recommendation for both the decision makers and the wider academic community.

The following deliverables served as a basis for HERN analysis:

Report on state accreditation – Czech case

Report on academic accreditation – Polish case

Report on German accreditation system

Report from the panel discussion 'Hidden variables of QA'

Report from the workshop 'The role of State and responsibilities of HEIs in QA'

Conclusions and recommendations

There is no Europe-wide general model or pattern of quality assurance and accreditation scheme in higher education. Recent developments show that in spite of policy declarations

stressing the necessity of harmonisation of national QA systems there is still a lot of divergence in approaching quality issue by individual European countries. We are witnessing a variety of approaches – let us only compare German meta-accreditation, Polish experiences in academic accreditation and Czech example state accreditation.

If we look at the European quality space at its present shape, we can distinguish several dimensions:

- State dimension, including legal regulations, national needs (such as labour market pressures), relationships of academic institutions with the 'outer world'. Weak points of State-driven QA systems: bureaucracy, attachment to standards and regulations (even if they are outdated).
- Academic dimension, including the community of students and academic staff. Academic community as such is interested in quality enhancement, but on its own terms ('I am university professor and it means that I do know how to teach!'). Weak points of Academia-driven systems: too academic and often too 'amateurish', too much focused on internal matters (closed system) without contacts with the 'external world'
- European dimension, being a consequence of emerging European Higher Education Area and European labour market and driven by the Bologna process. The European dimension can become a platform for the dialogue between State and Academia (it is driven by the EC being a 'European Government', and the EUA, being an umbrella for European academic community).

The above dimensions determine three sets of standards to be fulfilled by higher education institutions:

Basic **national standards** as set by law (core curricula, regulations concerning organisation of teaching and learning etc.).

Academic quality standards set by academic community itself (in formal or informal way).

Emerging **European standards**, elaborated e.g. in the framework of TUNING project or by international professional associations (FEANI, learned societies etc.).

General recommendations

- Evaluation and accreditation processes should not be too 'academic' nor too 'bureaucratic'. They should involve all actors, in particular students and employers. At the national level, they shall also include international components (to ensure harmonisation at the European level).
- The QA and evaluation methodology shall move towards a more outcome-oriented approach. Study programs shall be evaluated also from the point of view of potential employers.
- Accreditation and evaluation bodies should be independent (or at least autonomous) vs both State and Academia.
- The platform of the broad debate should be used (ENQA, CEEN). The examples of good practice should be widely distributed and the goal should be seen in mutual recognition of the national accreditation systems.
- In the system of external evaluation of quality different goals and tasks of individual higher education institutions shall be taken into account.
- There are 'hidden variables' of education quality, such as ensuring equal opportunities, stimulating development of positive attitudes etc. Most of the stakeholders are aware of them, but these quality aspects are very difficult to be quantified and evaluated. Future development of quality culture shall include taking into account broader

spectrum of quality factors and performance indicators and thus support promotion of citizenship values and 'human face' of post-industrial knowledge society.

- Psychological aspects of evaluation and accreditation shall be taken into account.

Recommendations for the university leaders and academic community at large:

- Awareness of importance of Bologna among university staff shall be enhanced. Quality assurance shall be seen as one of cornerstones of European house of education. Accreditation/QA shall be seen as a mirror for self-control of academic community.
- Academic institutions and academic community shall develop sense of ownership or at least participation with respect to QA processes.
- At the institutional (university/faculty/department) level internal evaluation shall be correlated with external evaluation to optimise the work performed to such purpose.

Possible future developments

European initiatives and projects (such as HERN) can support international networks and organisations dealing with quality assurance and accreditation through joint initiatives, in particular by setting up new projects based on past experiences and taking into account emerging needs. Recently several new ideas are being discussed with CEEN (Central and Eastern European Network of Quality Assurance Agencies), such as

- Preparation for mutual recognition of CEEN member agencies
- Repository of past and present QA-oriented projects realised in CEE (with stress on transferable good practice)
- CEE 'pool of young researchers' working on EHEA

There are also open possibilities for co-operation on QA with university networks, such as Coimbra Group and Compostela Group. Preliminary discussions on possible joint ventures have just started.

APPENDIX 1

Phare Multi-Country Programme in Higher Education

ZZ-95.20 Quality Assurance in Higher Education

THE PROJECT'S MAIN RECOMMENDATIONS

The main project recommendations are listed below, together with the paragraph number to which they refer and the organisations to whom they are principally addressed.

(i) Clarity about purposes and terms

A clear distinction between accreditation and evaluation, and clarity about the purposes of each, should be maintained and more attention devoted to evaluation. (paragraphs 2.1.2 and 2.3.4)

Ministries; Agencies; Higher education institutions

(ii) No European standards of quality systems

National quality agencies and international organisations should do more to emphasise to higher education institutions that there is *not* a unified system of evaluation, nor a set of agreed standards, for higher education in western European countries. (paragraphs 2.2.3)

Agencies; European Union

(iii) Comprehensiveness

National quality assurance systems should be comprehensive, in that they should embrace all higher education in a country. (paragraph 2.3.2)

Ministries, Agencies

(iv) Flexibility

National governments and agencies should consider making their quality assurance systems more flexible and more pragmatic; more emphasis should be placed on the self-evaluation stage of the evaluation process. (paragraph 2.3.5)

Ministries; Agencies

(v) Costs

National governments and agencies should be realistic in their estimates of the costs of quality assurance (including the costs to higher education institutions) and ensure that these costs are met; it can be expected that the benefit from quality assurance will exceed the costs. (paragraphs 2.3.2 and 2.3.3)

Ministries; Agencies

(vi) Faculties

In those countries with a strong tradition of faculty autonomy, institutional level evaluation should ensure that effective evaluation of faculties takes place, as part of necessary internal accountability within the institution. (paragraph 2.3.6)

Agencies; Higher education institutions

(vii) Institutional quality assurance

National agencies and international organisations should provide external assistance and support services to help higher education institutions to build up effective internal systems of quality assurance. (paragraphs 2.4.3 and 2.4.5)

Agencies; European Union

(viii) Institutional management

Higher education institutions should give priority to developing effective decision-making and planning processes at all levels within their institutions and these processes should be integrated with quality assurance; national and international organisations should help provide advice, training and information to support the development of effective institutional management. (paragraph 2.4.4)

Ministries; Agencies; Higher education institutions; European Union

(ix) Agency collaboration

National quality agencies should explore ways of collaboration by staff exchanges, by organising regional conferences and other joint activities; agencies should join relevant international or regional networks. (paragraph 2.4.6)

Agencies

(x) Transparency

National quality agencies should ensure transparency in quality assurance processes and this should include publication of the outcomes of evaluations; higher education institutions should ensure transparency of internal quality assurance processes and wide involvement in them by staff and students. (paragraph 2.4.7)

Agencies; Higher education institutions

(xi) Staff development

Staff development in quality assurance procedures should be provided for academics and for administrative support staff in higher education institutions and for the staff of national quality agencies. (paragraph 2.4.8)

Agencies; Higher education institutions

(xii) Accountability of agencies

As part of a general recognition of the importance of accountability for all public bodies – governments, agencies and institutions – national quality assurance agencies should monitor and evaluate the effectiveness of their processes and, from time to time, should undertake self-evaluation and external evaluation, the results of which should be public. (paragraph 2.4.9)

Ministries, Agencies

Source: http://www.csvs.cz/projekty/archiv/2000_phare_frei/Quality-Final%20report.htm

Annex 4

DELIVERABLE N° 39

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**“Ways of supporting visually challenged and
blind students in higher education society”**

Institute “integrated study”

University of Linz:

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Linz, January 2004

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The situation of students with disabilities in the countries- Regulations for students with disabilities

In the following, we will describe the typical situation, the support services and the regulations for students with disabilities in the different partner countries of our HERN Disability Research Group.

***Sweden*¹**

In Sweden, there are coordinators for students with disabilities. At all universities and institutions of higher education there is a contact person/coordinator, working with issues relating to educational support for students with disabilities.

The Swedish students are advised to make contact as soon as possible with the coordinator for students with disabilities at the university they are applying to. Each university and higher education institution offers special support to students with disabilities but each decides what form that support is to take. There are frequently possibilities to receive various individual support measures, although their availability cannot be promised to all students in all study programmes.

Pre-requisites for students with disabilities to accomplish higher education

Every university has to allocate resources for the specific support of students with disabilities.

A coordinator with specific responsibility for disability issues must be available at every university.

Essential factors are:

- the accessibility of the physical surroundings
- the psychological and psychosocial climate
- the possibility to plan the total study environment individually
- the possibility to modify the course of study
- the availability of special information on the conditions of students with disabilities in relation to finance, accommodation, travel, technical and practical support, healthcare, the co operation and information exchange between different providers of education, handicap organisations, and other public authorities.

***Poland*²**

Some universities have disability support teams in order to assist students with disabilities. It is not a result of legal regulations, but just the initiative of university chancellors (rectors) interested in the development in this area and education of persons with all kinds of disabilities at the university level.

In Poland 11 universities, which have disability student support teams or at least a contact person for disability, can be counted currently. The universities created a kind of informal network in order to change reality in higher education sector for people with all kinds of disabilities. Representatives of universities such as disability managers or contact persons

¹ Research Document 5, Sweden, page 3ff

² Research Document 5, Poland, page 3f

for disability, meet a few times a year. They hold discussions, exchange experience and draft projects of legislative solutions during such meetings.

In Poland there is no national or comprehensive support system for students with disabilities. Universities wanting to educate them create their own regulations which vary and depend on financial conditions and awareness of the problem. Also, the universities don't receive any significant funding from the government or the National Fund for Persons with Disabilities to support students.

Greece³

Greek higher education institutes accept persons with disabilities in a percentage of 3% above and beyond the total number of accepted students every year. This applies to the Greek Open University as well. There are no designated advisers for disabled students in Greek higher education institutes. Students with disabilities should contact the Secretariats of the university departments and discuss the necessary special arrangements in advance.

Attending the classes is not very easy for the university-disabled students due to the lack of:

Suitable study methods and study aids, interpreters for the deaf students, transcribed books and adapted libraries for the blind students, adequate careers counselling services, study orientation and careers information

As a result *visually impaired students* cannot read the syllabuses and reference books or use the university libraries. They usually ask for help from their fellow students to have the books recorded on to cassettes.

Deaf or hard of hearing students do not attend classes or seminars due to lack of sign language interpreters at the university. So they miss a significant part of the learning process and the related knowledge.

Students with physical disabilities –especially wheelchair users- have serious problems travelling round the campus and getting access to the buildings of which most are not adapted to their needs.

The Counselling Centre for students of the University of Athens was founded in 1990 and is supervised by the Psychology Department. It is the only university agent that provides services for the disabled students. The main objective of the Centre is to help the university students deal more effectively with educational, personal and interpersonal issues. In this context the Centre has completed three projects for the academic integration of the disabled students. The counselling centre also participated in Workable Centre Network, which gave emphasis to the occupational problems of disabled students and graduates.

Latvia⁴

In Latvia the design of special educational programmes for the people with special needs at the higher education level is not expected. Only for craftsmen at middle level it is possible to manage education with special programmes. New education materials and books are not developed and so the need for new books and study materials for visually challenged and blind people is arising. Developed programmes for university studies are not prepared for the special needs of people with disabilities.

Nevertheless there is an existing basic legal framework in the field of possibilities for people with special needs to attain higher education.

To realize effectively the basic rights and freedom of the disadvantaged social groups including people with special needs, the Copenhagen declaration undersigning their problems.

³ Research Document 5, Greece, page 4

⁴ Research Document 5, Latvia, page 1ff

According to the people with special needs, the questions are about the getting of the higher education, environmental accessibility and employability. One of the basic aims of the Copenhagen declaration is "To involve humans from disadvantaged social groups at social development programmes and integrate them in society, to provide the legal rights of individual at suitable physical and social environment. To succeed the human integration at society, UN accepted "The model regulations about equal possibilities for disabled".

At June 30, 1998, the Cabinet of Ministers of the Republic of Latvia accepted the conception "Equal Opportunities to All". The aim of the conception was to underline the basics of equal possibilities for all members of society. There are five parts including "The Education".

There are introduced the target group people with special needs at the laws. There are special educational programmes worked out for them. It gives them possibility for special environment for learning according their health, development level and individual possibilities, and at the same time providing the physical and mental corrections and preparing for the job and integration at society.

The "Law on Education of the Republic of Latvia"-1998, determines, that the learners with special needs can get an education at all education establishments – there are no restrictions. But there are only individual schools with all necessary environment for disabled to participate at active learning process. Educational establishments have not financial resources for necessary building reconstruction works. And teachers are not educated enough for pedagogical work with people with disabilities.

Although these laws and efforts the design of educational programmes for people with special needs at higher educational level is not expected. One main problem is that education materials are not available for visually challenged and blind students.

In order to ensure equal access and treatment in higher education there is the need for:

- Suitable physical and social environment;
- Development of the special educational programmes;
- Individual study timetable;
- Social worker at the higher education institution;
- Solved the transport and all environment problems;
- Information;
- Harmonization of legislation.

In order to solve the problems persons with disability face in society, higher education and the labour market the following suggestions should be paid attention:

- We should work on awareness in the society for the needs and possibilities of people with disability.
- We should think about how to motivate the managers to employ the persons with special needs;
- It is necessary to work out the programme for solving the problem by the State and local governments;
- It is necessary to find possibilities for reduction of the tax payments for organizations, which employ the persons with special needs.

United Kingdom⁵

In United Kingdom there is a wide range of support of students with disabilities:

Funding for Disabled Students

Students who declare they are disabled are entitled to a Disabled Students Allowance (DSA).

This is paid directly to the students and is used towards providing the supplemental facilities and equipment that the students may need to complete their studies. The amount varies from student to student.

Moreover, currently most institutions now have a disability officer who acts as a coordinator for the activities.

Quality Assurance Agency Codes of Practice

The Quality Assurance Agency has issued codes of practice to be observed by institutions in delivering education to students with disabilities. The principles are as follows:

General principles (as written by the QAA):

1 Institutions should ensure that in all their policies, procedures and activities, including strategic planning and resource allocation, consideration is given to the means of enabling disabled students' participation in all aspects of the academic and social life of the institution.

The physical environment

2 Institutions should ensure that disabled students can have access to the physical environment in which they will study, learn, live and take part in the social life of their institution.

3 Institutions should ensure that facilities and equipment are as accessible as possible to disabled students.

Information for applicants, students and staff

4 The institution's publicity, programme details and general information should be accessible to people with disabilities and describe the opportunities for disabled students to participate.

The selection and admission of students

5 In selecting students institutions should ensure equitable consideration of all applicants.

6 Disabled applicants' support needs should be identified and assessed in an effective and timely way, taking into account the applicant's views.

Enrolment, registration and induction of students

7 The arrangements for enrolment, registration and induction of new entrants should accommodate the needs of disabled students.

Learning and teaching, including provision for research and other postgraduate students

8 Programme specifications should include no unnecessary barriers to access by disabled people.

⁵ Research Document 5, United Kingdom, page 2ff

9 Academic support services and guidance should be accessible and appropriate to the needs of disabled students.

10 The delivery of programmes should take into account the needs of disabled people or, where appropriate, be adapted to accommodate their individual requirements.

11 Institutions should ensure that, wherever possible, disabled students have access to academic and vocational placements including field trips and study abroad.

12 Disabled research students should receive the support and guidance necessary to secure equal access to research programmes.

Examination, assessment and progression

13 Assessment and examination policies, practices and procedures should provide disabled students with the same opportunity as their peers to demonstrate the achievement of learning outcomes.

14 Where studying is interrupted as a direct result of a disability-related cause, this should not unjustifiably impede a student's subsequent academic progress.

Staff development

15 Induction and other relevant training programmes for all staff should include disability awareness/equality and training in specific services and support.

Access to general facilities and support

16 Students with disabilities should have access to the full range of support services that are available to their non-disabled peers.

Additional specialist support

17 Institutions should ensure that there are sufficient designated members of staff with appropriate skills and experience to provide specialist advice and support to disabled applicants and students, and to the staff who work with them.

18 Institutions should identify and seek to meet the particular needs of individual disabled students.

19 Internal communications systems should ensure that appropriate staff receive information about the particular needs of disabled students in a clear and timely way.

20 Institutions should have a clearly defined policy on the confidentiality and disclosure of information relating to a person's disabilities that is communicated to applicants, students and staff.

Complaints

21 Institutions should ensure that information about all complaints and appeals policies and procedures is available in accessible formats and communicated to students.

22 Institutions should have in place policies and procedures to deal with complaints arising directly or indirectly from a student's disability.

Monitoring and evaluation

23 Institutional information systems should monitor the applications, admissions, academic progress and nature of impairment of disabled students.

24 Institutions should operate systems to monitor the effectiveness of provision for students with disabilities, evaluate progress and identify opportunities for enhancement.

Austria⁶

At the universities of Vienna, Graz, Klagenfurt and Innsbruck as well as the Vienna *Technical University*, representatives for students with disabilities and suffering from chronicle illness have been appointed. Only people with a disability or suffering from a chronicle illness themselves have been chosen to act as contacts for students with disabilities and to counsel them in all matters concerning the subject of "studying with a disability". They also act as intermediaries between students and teachers. The representatives explain the needs of disabled students regarding equal access to universities to the heads of staff and advise the latter on how they should react to these needs.

Another institution is that of students' assistants, who respond to the students' requirements in their daily university life. They accompany students to lectures, take notes for them or adapt study materials to their special needs. For that purpose, there are special PC-workstations available at most universities, which are mainly used by blind or partially sighted students.

The *Österreichische Hochschülerschaft* (ÖH), the representative body of Austrian students, has also established Social Departments, which counsel students in all matters pertaining to financial aspects and the contents of their particular courses of study.

One of the most important offers of assistance to disabled students is the **support at institute level**. This particular kind of support is offered by the *Institute integrated study* at University of Linz, together with its partner universities of Vienna, Graz and Innsbruck and the *Technische Universität* Vienna. A similar service is being offered by the **fortec work group at the TU Vienna**, which is mainly a research institute but also offers planning and development of technical assistance for individual students and supports those students in the technical aspects of their everyday university life.

Legal regulations concerning the right to equal access to studies at Austrian higher education only exists in the area of **examinations**. When registering for an examination, students with a health impairment lasting longer than 3 months are entitled to apply for this examination to be performed in a special way. A verbal application is also possible. For example, this could be an application for an extension of the time allotted for the examination.

Conclusion

In **Sweden** do exist coordinators for students with disabilities. The universities have to reserve resources for special support of disabled students and universities must be accessible. There is the possibility of modifying courses and of lending books from the library of talking books and braille.

In **Poland** there are 11 universities, which have disability support teams or a contact person for disability. But this is not a concern of the government/state but an initiative of the universities themselves.

There are not any designated advisers for disabled students in **Greek** higher education institutes. Students with disabilities should contact the Secretariats of the university departments and discuss the necessary special arrangements in advance. Attending classes

⁶ Research Document 5, Austria, page 4f

is very difficult for students with disabilities because of lacks of suitable study methods and adequate counselling services.

Studying in **Latvia** for disabled students is very difficult and problematical, because there are no services or support like preparing materials for people with special needs or counselling.

In **United Kingdom** most higher education institutions have a disability officer/disability coordinator. In addition to that several forms of funding for students with disabilities is arranged. A central feature of UK is the Quality Assurance Agency, which has issued codes of practice to be observed by institutions in delivering education to students with disabilities.

At the most universities in **Austria** there are representatives for disabled and chronically ill students, students' assistants and Social Departments, which face the needs of disabled students. One of the most important institutions in field of support and service of disabled students is the Institute "integrated study" at University of Linz, which will be described in detail in chapter 2 of this report.

Support for blind and partially sighted persons in Higher Education

Sweden⁷

Service from The Swedish Library of Talking Books and Braille

The *students service* at TPB will lend course literature in alternative media to print handicapped students at university level.

TPB has a special service directed towards print handicapped students at university level, i.e. the visually challenged, physically impaired, and dyslexics. The service allows the students to have access to their course literature as talking books, e-text books, braille books, or enlarged text. The loans are free of charge.

Modification of the curriculum

If a course or part of a course contains elements such that the student with disabilities is judged not to be able to follow or assimilate the course or part of course because of his disability, then this fact should be made clear to the student by the director of studies in a meeting when the student is starting his studies. Based on this meeting, the director of studies, or equivalent, should in consultation with the counsellor and or disability coordinator decide if the curriculum should be modified for the student.

Such modification may mean that a certain course is omitted then it should be stated whether the time allotted for the omitted part is to be used for further studies of one or more other parts or if a new part, not present in the curriculum, should be added.

If the disability prevents the student from being examined in the manner stated in the curriculum, then the student should be given the opportunity to be individually examined in some other form.

In some cases the disability requires a slower rate of study than the norm. It is assumed that the director of studies and disability coordinator and the student together create an individually modified course study to enable the student to complete the education. The individual course of study should be monitored on a regular basis.

⁷ Research Document 5, Sweden, page 4ff

Poland⁸

Support for individuals

There are two programmes of National Fund, which are designed for students with visual impairments.

The first programme is "Student" for persons with any disabilities including visual impairments. The aid is given in base of results of studies and personal situation of student's family. It is usually between 200 and 300 Euros for one student in practise. Theoretically they can apply for about value of five the lowest salaries in a country, so it could be for about 1000 Euros annually for now. Financial situation of family is relevant limitation for some students. Results in their studies also should not be taken in to consideration, because there are some students who have not good results, but who should study and develop themselves. They should have equal right to receive the aid.

The second is programme called "Computer for homer" which aimed providing visually challenged people computers, special software and any other technical aid. The programme is not designed just for students, but for all persons with visual impairments. However students receive the aid as the first group.

Visually challenged students who would like to study can take advantage of "Computer for Homer" programme and after completing one semester they can apply for additional support from "Student" programme.

Good practise

Fortunately some higher education institutions try to realise equal opportunities principle in practise, not waiting for permission from the government. There are exist a few good solutions for visually challenged students suggested by Warsaw University and implemented in other institutions:

Entrance exam

Visually challenged students wishing to enter the university can take an entrance exam in alternative forms – Braille, large print, additional help of assistant, oral exam. Every alternative form takes long time, so they have right to take it in extended time. It is usually 50% of standard time more. At The Warsaw University exams in Braille are prepared by the Computer Centre for visually challenged students. In other universities because of technical problems and lack of such centres, exams in Braille are not applied, but students have right to change written form to oral or help of assistant.

Orientation training

Some universities offer also orientation training for visually challenged students. The training is focusing on familiarizing with university buildings and places, which are relevant for students.

Virtual libraries

The centre for Students with Visual Impairments at The Warsaw University offers talking books and digital library for students. Talking books are recording by volunteers who work for Disability Support Service. Digital library consists of books prepared by centre's staff and also by students themselves. They can copy books and put into library books, which they already scanned if they want to share of their books with others.

This is a first idea of such library in Poland created and managing by disability Support Service at The Warsaw University. All books are available in The Internet for all students with visual impairments from whole Poland. Using the digital library is free of charge for all persons with visual impairments.

⁸ Reasaerch Document 5, Poland page 5ff

Greece⁹

Visually challenged university students are usually registered in Law, Psychology and Education. During their studies they report the following problems that face:

1. Difficulties in the access of faculties, rooms, libraries, general problems of labelling and mobility.
2. Difficulties in the follow-up of courses, when transparencies or written material are used.
3. Lack of material and technical infrastructure that could assist the students to attend the courses.

Institutes, which are in charge for education, social integration, vocational orientation and rehabilitation of blind and partially sighted individuals, are:

1. The Centre of Education and Rehabilitation of Blinds
2. The "Helios" Institute for the Protection of Blind of North Greece
3. The "Communication" Centre
4. The "Lighthouse" of Greek Blinds
5. The School for Telephone Operators
6. The Pan-Hellenic Union of Blinds
7. The Organization for the Occupation of the Work Force.

The "Lighthouse" of Greek Blinds

The "Lighthouse" of Greek Blinds is a no governmental organization, which offers services to the blind people in the following areas:

- Career development, professional rehabilitation and social integration.
- Social adaptation
- Reduction of consequences of blindness.
- Research on blindness
- Sensitisation of the public on the problems that blind people face.

Finally, in the "Lighthouse of Greek Blinds a Special Printing centre for the transcription of books in Braille runs, a Recording Studio for Talking Books and a library with Braille books and Talking Books.

The Counselling Centre for students of the University of Athens: Workable Centre Network

The Counselling Centre for students of the University of Athens was founded in 1990 and is supervised by the Psychology Department. It is the only university agent that provides services for the disabled students. The main objective of the Centre is to help the university students deal more effectively with educational, personal and interpersonal issues. In this context the Centre has completed three projects for the academic integration of the disabled students.

The first one -duration of two years (1992-94), partially financed by the EU programme HORIZON- concerned the integration of the deaf students. The objective was the training of 15 university students on the issues of counselling the deaf.

⁹ Research Document 5, Greece, page 4ff/ Research Document 4, Greece, page 6f

The experienced gained of this project helped the personnel of the Counselling Centre to form a network of supporting the blind students and the students with motor disabilities as well. A few students of the Psychology Department worked as fellow counsellors under the supervision and guidance of two doctoral candidates of the department.

The third project gave emphasis to the **occupational problems** of the disabled students and graduates. The Counselling Centre participated in Workable Centre Network, Europe (Leonardo Da Vinci programme, EU Directorate General XXII, 1995-1999) to provide disabled university students and graduates with a center dedicated to job search and work experience. The reason for this was and still is, that disabled people are four to six times less likely to be successful in the job market than their non disabled peers which means that there are a growing number of disabled graduates without employment (Hawks, 1999). Centres were established in U.K (main partner), Austria, Germany, Greece, and The Netherlands and acted as service providers for three groups –the disabled students and graduates, the universities and the employers, each group having specific requirements.

- For disabled students and graduates there was job hunting skills training, career counselling, and work experience placements, tailor made to their requirements.
- For universities there was a support service for university staff and for their disabled students, access to training programmes, and to employers network.
- For employers there was access to awareness raising and other support services.

Career Offices

The University Career Offices provide guidance services to the disabled students in order to

1. help them understand the particular characteristics of various types of businesses,
2. acquire entrepreneurial skills,
3. transit from the university to the labour market

Latvia¹⁰

There are no visually challenged and blind students at higher education establishments in Latvia now because there is no necessary environment for blind people learning possibilities and no necessary technical possibilities at institutes and colleges. One main problem is that education materials are not available for visually challenged and blind students. In addition to that educational establishments do not have financial resources for necessary building reconstruction works. Moreover, the teachers and the staff are not educated enough for pedagogical work with people with disabilities.

United Kingdom¹¹

In November 2002, HEFCE issued a good practice guide on “Successful Student Diversity”. It was aimed at providing examples of practice to improve planning in widening participation (including disability). The guide shows the varied approaches of institutions with respect to developing a strategy for supporting the issues related to disabled students. Currently most institutions now have a disability officer who acts as a coordinator for the activities. Some specific examples of how institutions are dealing with disability issues are:

-Institutional/Departmental level

(#48) The University of Hull’s approach to disability has established structures to facilitate departmental activity. These structures include: a disability committee to consider strategic issues and monitor plans and provision for disabled students; a disability forum to generate new ideas to improve procedures and provision for disabled students; a disability forum to generate new ideas to improve and provision for disabled students; and departmental

¹⁰ Research Document 5, Latvia, page 1ff

¹¹ Research Document 5, UK, page 7f

academic disability tutors. Disability-related services are better resourced than in many other HEIs with eight staff in the dedicated disability service located within Student Support Services.

(#59) University College Worcester distributed funding to all departments for implementing its strategy on disability. In return the Equal Opportunities Centre requested colleagues to complete a departmental audit of provision and practices compared with the QAA's Code of Practice for Students with disabilities. All departments were then asked to produce an action plan to illustrate compliance with the new SENDA legislation. Interaction between departments and the Equal Opportunities Centre is an important component of the institution's strategy for providing a good service for the 4 percent of students who have declared a disability.

Staff Development and training opportunities

(#84) Recently, disability awareness training has featured in many HEIs including the Universities of Gloucestershire, Hull, Liverpool John Moores, West of England, and Salford, and Queen Mary, University of London. Such training is designed partly to encourage staff to generate ideas for supporting students with difficulties in accessing facilities, such as websites. The University of Hull has targeted staff for special disability training, and gives new and established lecturers the opportunity to complete a learning module that contributes to accreditation by the Institute of Learning and Teaching (ILT). The University of Salford deployed a less direct form of staff training. The course leader actively involved disabled staff or staff with experience of disability as members of the team or advisers to the programme.

Piloting Innovative Programs

(#140a) The MSc in Inclusive Design being piloted at the University of Salford will provide departments with practical ideas on how to plan and operate distance on-line courses suitable for people with a range of disabilities. The pilot is also helping staff to ensure that lecturers' material is as accessible on-line as it is in front of a class. The programme is developing exercises for measuring learning outcomes and choosing the best way to achieve each outcome for disabled students.

Austria¹²

One of the most important offers of assistance to disabled students is the **support at institute level**. This particular kind of support is offered by the ***Institute of integrated study*** at the University of Linz, together with its partner universities of Vienna, Graz and Innsbruck and the *Technical University Vienna*. The institute will be described in the following chapter in detail.

“integrated study” as model for an Austria-wide Institute for Information Systems Supporting Print Disabled Students

Presentation of the Institute “integrated study”

The institute was established in October 1991 as a model project, which tries to support blind and visually handicapped students in their studies. The main part of the support activities is the digital preparation of all studying materials such as books, lecture notes, overhead sheets, exercises, contents of the blackboard and so forth print disabled students all over Austria. Research and teaching is also mainly directed towards this field. In 1995 the model project was established as the Department Computer Science for the Blind. In 2000 an Austrian wide institute was established.

¹² Research Document 5, Austria, page 5

Research and teaching is oriented towards ICT for people with disabilities, Assisstive Technologies and their application and therefore also toward inclusion. More specific aspects are:

- accessible and usable man-machine-interaction
- adaptive interfaces and ambient intelligence
- electronic libraries and electronic publishing for people with disabilities
- research in pedagogical, psychological and social aspects of the use of ICT and assistive technologies
- access to notations of mathematics, chemistry and music for print disabled people
- document, WWW and software accessibility
- inclusive teaching
- speech recognition applications for people with disabilities

Related Research and Project Activities:

Since the beginning the department has been involved in more than 30 national and international projects. The most important ones of them are listed below:

- **ICC** (International Computer Camps): The department initiated and organises annual International Computer Camps for young blind and visually handicapped students to train in handling the PC, to prepare them for university and to empower international and intercultural exchange. More than 1000 blind and visually handicapped students from more than 35 countries were taking part in these events till 1993
- **WORKABLE CENTRE NETWORK - EUROPE** project in the frame of Leonardo Da Vinci Programme of the European Commission; since March 1996 project manager of the project in Austria and representative in the international project management group
- **TESTLAB** (Testing Systems using Telematics for Library Access for the Blind) project in the frame of EU-TELEMATICS-LIBRARIES; initiator and since August 1996 member of the national working group
- **“Mathematics for the Blind”** (supported by Forschungsförderungsfond der wissenschaftlichen Forschung, Austria)
- **VOICE** project in TIDE (Technology Initiative for Disabled and Elderly People) in the frame of the TELEMATICS APPLICATIONS PROGRAMME (1994 - 1998) of the European Commission - DG XIII, Telecommunications, Information Market and Exploitation of Research; Austrian project co-ordinator
- **EVIS** (Informatics Education of Visually Impaired Students) project in the frame of the Leonardo da Vinci of the European Commission; project manager in Austria
- **ABAK** (Arbeitsplätze für behinderte Akademiker – jobs for graduates with disabilities), funded by the Austrian Ministry for Social Affairs and the European Social Fund
- **Blind-Train** (training of blind persons to work in call centres), funded by the Austrian Ministry for Social Affairs and the European Social Fund; technical support and evaluation of the project
- **BIQ** (training of blind people for the integration at the labour market), funded by the Austrian Ministry for Social Affairs and the European Social Fund; technical support and evaluation of the project
- **DIEPER** (Dligitised European PERiodicals) project funded by the European Commission, DG XIII, deals with retrospective digitisation of printed periodicals; technical support

- **ALO** (Austrian Literature Online) deals with making old Austrian literature available on the Internet and thereby accessible for print disabled people. In co-operation with institutes for German literature in Austria an online library should be established
- **ACCELERATE** (ACCESs to the modern Library sERVICES for the blind and pARTially sightEd People) is a follow up project of TESTLAB bringing the results to other countries and involving additional partners
- **YourLife** (Your life, your work, your future: Using employee development schemes as innovative work placed social partnerships in learning: development of transnational training materials)
- **META-E - METADATA ENGINE** (Information Society Technology - IST, EU): Digitisation of documents and automatic generation of meta data necessary for usage and administration; OCR for old fonts; fast search engine for SGML/XML documents
- **ASAP** – (Leonardo da Vinci, EU): Training of blind and visually handicapped students from Greece in access to information and communication technology.
- **ECDL-PD** – (Leonardo Da Vinci): European Computer Driving Licence for People with Disabilities; organised in the frame of the Austrian ECDL-Austria Initiative of the Austrian Computer Society, tries to make the ECDL accessible for people with disabilities and to use this internationally promoted certificate to promote the integration of people with disabilities
- **INTEGER** - Master Study Course in Inclusive Education (responsible for IT in inclusive education)
- **ODL** – Open Distance Learning in Teacher Training for Inclusive Education (responsible for IT in inclusive education)
- **books2you** (Information Society Technology – IST, EU); distance loan system for libraries based on digitisation of documents and integration into a electronic library
- The Development of a Tool to Enhance Communication Between Blind and Sighted Mathematicians, Students and Teachers: A Global Translation Appliance (2001 – 2004): **project funded by the US Department for Education together with University of South Florida, Tampa, New Mexico State University, University of Texas at Dallas and State University of New York;**
- **HERN** (2002 – 2005) (Higher Education Research Network), research on the situation of people with disabilities in Higher Education in Europe
- Entwicklungs-Partnerschaft "INTEGRATIONSFIRMEN" (Setup partnership „integrative companies“) (2002 – 2004): **EU – EQUAL project to set up integrative companies in the region Upper Austria**
- Entwicklungs-Partnerschaft “Youth Entry“ (Setup partnership „Youth Entry“) (2002 – 2004): EU – EQUAL project to support the transition of young people with disabilities into the labour market in the region Upper Austria
- Regional Competence Centre IT for People with disabilities (KI-I) (start 2003), initiating and chair of KI-I, an organisation of the Regional Government Upper Austria
- IDCNet
- D4All
- IDOL
- ESF
- Beirat

The institute is involved in the Austrian wide production of teaching and learning materials for blind and visually handicapped students in primary and secondary schools which is

organised by the ALS (Arbeitsgemeinschaft zur Lehr- und Lernmittelerstellung für Sehgeschädigte). i3s3 is also involved in teacher's education, especially concerning IT usage in integrated education.

Staff of the institute has been working for several years as evaluator and reviewer for the European Commission.

Since 2002 "integrated study" is the National Contact Point for the EdeAN, the European Design for All and e-Accessibility Network.

In 1996 the department organised the 5th International Conference on Computers Helping People with Special Needs (ICCHP) '96 in co-operation with the Austrian Computer Society (OCG). Since that the department is responsible for the organisation and the scientific programme and chairs the working group responsible for the conference inside the OCG. 2002 the conference was organised once again at the University of Linz. In the future ICCHP will be the conference of i3s3.

Background:

An open and democratic society cannot and must not neglect the challenges of integration of people with disabilities. Consequently, integration has been acknowledged as a social concern.

On July 9th 1997, the Austrian Federal Parliament unanimously passed an addendum to Article 7 (1) of the Federal Constitution. It reads:

"Nobody may be discriminated because of his/her disability. The republic (federation, federal countries, and communities) confesses to ensuring equal treatment of people with disabilities in all areas of daily life."

Hereby, education, in particular advanced and higher education, has a special mission:

- Obstacles in access to education, by which possibilities and chances of life are selected, intensify exclusion.
- Enabling of and integration into education may, since it is socially acknowledged, help overcome prejudices.

Every university is bound to follow this principle. i³s³ offers the possibility to follow this mission for the print disabled efficiently and with effective exploitation of existing resources.

Access and integration into higher education lead to a better integration into the open labour market. In addition to that higher education is a way of reducing prejudices against persons with disabilities and promoting integration into society.

By supporting students with disabilities at institute level, including the disability-issue in areas of teaching and research as well as by the appointment of representatives for students with disabilities as university employees, the integration of people with disabilities at higher educational levels in Austria has taken a remarkable step forward.

To gain higher education with a disability or chronicle illness is no longer fated or an individual's personal destiny, depending primarily on his or her will, power and stamina, but a social phenomenon that concerns everybody working in university circles, including the heads of staff. Integration is a task to be fulfilled by universities themselves - an **internal task**. And may not be left to external administration or bureaucracy.

Integration should be seen as comprehensive concept of service provision, research, development and teaching. Moreover integration must be constituted in the structure of universities. The realisation of integrative structures at universities becomes more important.

Integration – A Task for the Lecturers

The Law of Studies Organisation obliges the lecturers to enable everyone - who has both, the qualification for and the inclination to completing university studies - to do so in a form adequate to the student's needs.

Hence *i³s³* is primarily an institution that supports the lecturers in fulfilling this responsibility. Print disabled students shall be able to find comparable chances for success in their studies, independent of the discipline or the place of their studies.

The Concept / Model of an Austrian wide institute for service provision for print disabled students

Definition of the target group “print disabled”

“All people who have problems in using standard printed materials and who benefit from a better usability in accessing digital documents in alternative formats” - visually challenged and blind people, people with motor disability, people with learning disorders and so forth.

Combination of Service, Research, and Teaching

By efficient utilization of new information technologies, *integrated study* assures long-term support and integration of print disabled students. By combining services with research in the field of applied computer science, the demands of teachware and didactics of the various subjects can be constantly reflected, such that ways of communicating complex interrelations to the target group may be developed.

In courses offered all over Austria, print disabled students acquire IT skills that are above average. Paramountly, print disabled students become experts in the use of specific adapted (and adapting) hard- and software systems. For this target group, IT is a cultivation, such as paper and pencil are for the fully sighted.

The three areas of work

The Institute integrated study deals with the following areas of work:

- 1) Austrian wide **service** provision for print disabled students
 - Preparing
 - Introductory and accompanying
 - Leading over (transitive)
- 2) **Research** in applied computer science
 - Methodology of disciplines
 - Information technology for print disabled
 - Design for all
 - Information system
 - Social-integrative effect of information technology
 - Integrative PC-supported teaching
- 3) **Teaching** in the subject areas of Information and Communication Technologies, Accessibility and “Design for All”
 - Support of lecturers / teaching
 - Courses at university level

The combination of general and specific teaching on the one hand and research and practice (projects) on the other hand is the special feature of the concept of the *i3s3* institute.

The concept of service provision, research, development and teaching

The main part of the support activities is the digital preparation of all studying materials such as books, lecture notes, overhead sheets, exercises, contents of the blackboard and so forth for blind and partially sighted students. Beside digitisation and meta-data enrichment the co-

operation with publishers, authors and lectures is most important to optimise the document delivery process. The preparation of all studying materials is the task of teaching itself and not an added service.

Research and development work is based on practical experiences made in service provision. Research, project and development activities focus on issues related to the service provision system.

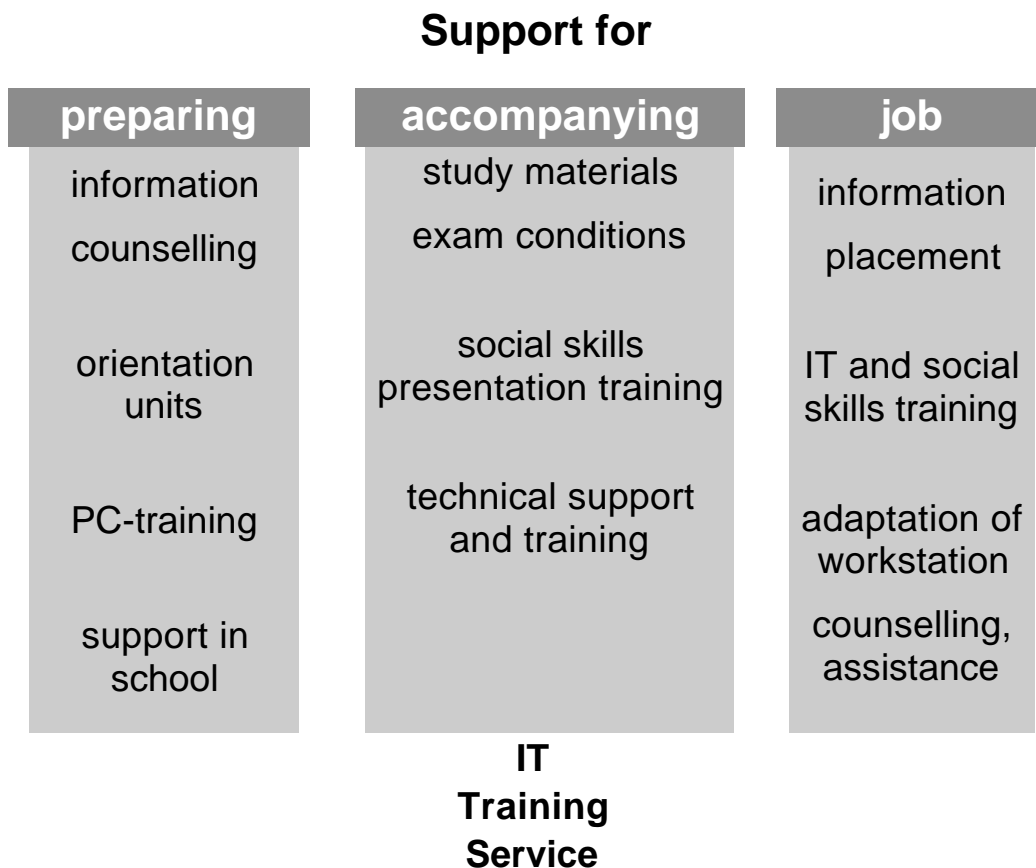
i³s³ also offers teaching and training in IT, social skills, preparing for university, job integration and other fields.

Contact model - support of teaching: Preparation of study materials

In order to provide full service contacts to different groups of people are central:

- *contact with students* (to clarify the needs/demand)
- Organisation and planning of the provision of studying materials forces a high extent of study organisation of print disabled students. The process of organisation and preparation has to begin two until six months before entering university.
- *contact with teaching staff* (discussion about studying and learning materials, form of preparation and alternative methodology, visual methods)
- *analysis of materials* (books, lecture notes, software, media..)
- *cooperation with and integration into the publishing industry, authors and lectures* and thereby the convergence of interests of both publishing industry and service provision organisations
- *preparation of materials*
- *biblio-/mediothek*

The three columns of service provision



1) Service

Study counselling: A counselling, which is independent from the place of study and from the field of study should be established for blind and partially sighted students. The students should be supported during the process of decision-making.

Information: Every year information events for pupils and school classes are arranged.

International Computer Camps (ICC): The department initiated and organises annual International Computer Camps for young blind and visually handicapped students to train in handling the PC, to prepare them for university and to empower international and intercultural exchange.

1) Accompanying support service

Support during the phase of entering university (i.e. support of enrolment): So called "Erstemestrigen Tutorien" (tutors responsible for first-year students) help students with disabilities to cope with the new situation and to get in contact with colleagues.

Private computer equipment: Every print disabled student is provided with personal computer equipment funded by the public sector.

Counselling and support: If students with disabilities are faced with personal or study related problems they have the possibility to turn to psychological counselling service. In addition to that students with disabilities are supported concerning social integration (culture, sport)

2) Transition support service

The aim of integration into university is integration into the open labour market – economical integration. The fact is that graduates will be confronted with prejudices.

The barriers should be reduced by:

- Information about the labour market: Information about the qualification and capabilities of graduates and information about funding
- Practice in firms and organisations should on the one hand help to reduce prejudices and on the other hand being employed is a chance to make experiences. The transition into the open labour market should be made possible (project WORKABLE)
- Job placement and job coaching: The project ABAK is searching for jobs for graduates with disabilities

With these three columns of service provision a comprehensive support of print disabled students is ensured. The support process starts before studying (information of school classes, counselling). During their study print disabled persons are accompanied in many ways (preparation of studying materials, social integration, counselling). Before finishing the study support services for transition into the open labour market are offered (Workable).

An IT based Austrian Wide Network for Service Provision – Networking

Services for print disabled people at least should provide access to a comprehensive network of competences, which are necessary to develop the skills for studying and doing research. Networks can provide what is often not affordable at a local level. Local centres can concentrate on their field of competence. Libraries are very well networked, much better than other organisations. The challenge for future library services will be related to more comprehensive service provision in a network of distributed competences.

Because of the coordination and networking resources and structures can be used more efficient.

Arguments and reasons for centre networking and co-operation for a full-scaled service provision at all universities

- Number of students*: At the local level the number of blind and partially sighted students is too low in order to install a comprehensive and long-lasting program for support.
- Not to force students to decide for certain universities and subjects*: Successful local initiatives tend to establish centres of support. An Austrian wide cooperation will prohibit that students will be assigned a place in these centres automatically.
- Autonomy of universities and allocation of finances*: Autonomy universities are often characterised by conflicts about the allocation of budget. The danger is that integration is only a matter if enough money is available. But if there are problems with finances integration might be seen again as a task of extern departments. The social concern of integration must be fixed on a societal and political level. The Austrian wide cooperation is the only chance to save the structures of integration.
- A high extent of expenditure/effort of investment and maintenance*: The investment, above all the maintenance of technical installations and the training of personal, forces cooperation in order to ensure the provision of services for blind and partially sighted students.
- The need for education in special areas*: The fast technical changes intensify the training of special culture techniques of blind and partially sighted persons (arrangement of summer academies, e-learning)
- transitions*: universal and economic integration must be prepared in time. That means that an intensive phase of preparation is necessary. For transitions a system of cooperations must be built up (cooperation with schools, labour market, projects for vocational integration)
- Changing teaching/learning methods – need for ongoing research*: The changing teaching and learning methods force permanent research, which should be characterised by cooperation and coordination between the universities.
- Coordination of contacts with the publishing industry*: As the access to studying materials is one of the main tasks of integrated study the preparation of materials forces contact with authors and the publishing industry.
- Further education of staff needs an Austrian wide network*
- Efficient use of resources*: Only a coordination of resources can guarantee an efficient use of resources.

Results from HERN questionnaire – Support for visually challenged and blind students

In the questionnaire the experts were asked to develop strategies of supporting visually challenged and blind graduates in higher education and to evolve measures for equal access into the open labour market.

One significant point disability experts mentioned is the **preparation of accessible study materials**. Study literature like books, lecture notes, overhead sheets, exercises, blackboard - contents and so forth should be available digitally or in Large / Braille print as well as Study information brochures. Schools or universities should make accessible equipment and information available to all people needing it.

One more way to support visually challenged and blind students is to provide adequate **technical aid** which should be developed further by research.

The aspect “**mobility**” is referred as a very important issue. Mobility trainings should be arranged in order to ensure mobility of students with disabilities. Moreover, they should get a movable equipment.

The disability experts used the term “**support**” itself in some respects. One statement is that visually challenged and blind students should get special support if they are in need. It is also pointed out that disabled students should get support in every concern. In addition to that their self esteem, their motivation and their own engagement and independence should be increased. The fact that the resources and methods for support structures have to be made available.

One important point is “**infrastructure**” and “**accessibility**”. In order to provide integration into higher education and the open labour market it is necessary to establish an infrastructure in all areas of life for students with disabilities. A better accessibility of the work places and higher education should be ensured by e.g. good public transportation. The workplace should have an adequate equipment as e.g. screen readers and so on.

A very significant measure in order to support visually challenged and blind students is to initiate **special regulations** such as oral examinations or extended time for students with disabilities.

Some experts suggest to begin by setting measures in the whole **education system**. One statement is to promote integration already in primary school in order to obtain competences in social processes. One precondition is to dispose architectural barriers. Another proposal for supporting people with disabilities is the support of the education system in respect to more qualified teachers, technical equipment, examination conditions (time, oral/written) and an adequate form of teaching. Integration forces such measures. Another opinion is to extend primary school and compulsory school and to offer only adequate and actual apprenticeship.

Another proposal for support is to arrange a close intensified cooperation with students organisations. It is also mentioned to organise computer workstations for visually challenged and blind persons at the universities and ensure personal support.

References:

In English:

- HERN Research Documents from Sweden, Poland, Greece, Latvia, United Kingdom and Austria.
- HERN Questionnaire, Results from Austria

In German:

- Miesenberger, K.: Informatik für Sehgeschädigte; Soziale Aufgabenstellung einer technischen Disziplin, Dissertation, Universität Linz
-

Attachment A: HERN Questionnaire / Results

Country:

- Austria **33**
- Latvia – Collecting data
- Greece **29**
- United Kingdom – Collecting data
- Sweden **11**
- Poland – Collecting data

Do you answer this questionnaire as member of a governmental or a non - governmental institution or as a private individual?

	A (n=32)	G (n=9)	S (n=9)
<input type="checkbox"/> governmental organization	13 (50%)	3 (33,3%)	7 (77,8%)
<input type="checkbox"/> non – governmental organization	16 (40,6%)	4 (44,4%)	2 (22,2%)
<input type="checkbox"/> private individual	3 (9,4%)	2 (22,2%)	0

Size of the institution/number of employees:

	A (n=29)	G (n=16)	S (n=11)
<input type="checkbox"/> 1-10	10 (34,5%)	10 (62,5%)	2 (18,2%)
<input type="checkbox"/> 11-50	6 (20,7%)	6 (37,5%)	2 (18,2%)
<input type="checkbox"/> 51- 150	7 (24,1%)	0	1 (9,1%)
<input type="checkbox"/> 151- 500	0	0	0
<input type="checkbox"/> more than 500	6 (20,7%)	0	6 (54,5%)

Please think of the size of your target group:

How many graduates with disability do you support in 1 year?

	A (n=28)	G (n=16)	S (n=10)
<input type="checkbox"/> 1 - 50 clients/year	19 (67,9%)	13 (81,3%)	3 (30%)
<input type="checkbox"/> 51 – 150 clients/year	6 (21,4%)	2 (12,5%)	5 (50%)
<input type="checkbox"/> 151 – 300 clients/year	1 (3,6%)	1 (6,3%)	2 (20%)
<input type="checkbox"/> 301 – 500 clients/year	1 (3,6%)	0	0
<input type="checkbox"/> 501 – 700 clients/year	1 (3,6%)	0	0
<input type="checkbox"/> 701 - 1000 clients/year	0	0	0
<input type="checkbox"/> More than 1000 clients/year	0	0	0

What type of disability is most represented within the group of students/graduates you deal with? (multiple answers possible)

	A (n=33)	G (n=18)	S (n=11)
<input type="checkbox"/> People with Motor Disability	23 (69,7%)	8 (44,4%)	8 (72,7%)
<input type="checkbox"/> Blind and Partially Sighted	19 (57,6%)	14 (77,8%)	6 (54,5%)
<input type="checkbox"/> Deaf and Hard of Hearing	17 (51,1%)	5 (27,8%)	7 (63,6%)
<input type="checkbox"/> People with learning disorders	9 (27,3%)	9 (50%)	10 (90,9%)
<input type="checkbox"/> People with psychic disorders	13 (39,4%)	3 (16,7%)	4 (36,4%)
<input type="checkbox"/> Mentally challenged persons	9 (27,3%)	2 (11,1%)	2 (18,2%)
<input type="checkbox"/> People with multiple disabilities	14 (42,2%)	2 (11,1%)	2 (18,2%)
<input type="checkbox"/> Others: _____	7 (21,2%)	0	0 (18,2%)

Austria - Other types of disability: chronic illness (4), impairment of verbal communication (1), unemployment for a long time (1), no clientel (1)

Labour Market Situation

How would you assess the labour market situation with regard to the issue of integrating academics with disabilities in your country?

	A (n=32)	G (n=26)	S (n=10)
<input type="checkbox"/> Very satisfying	0	1 (3,8%)	0
<input type="checkbox"/> Satisfying	2 (6,3%)	2 (7,7%)	0
<input type="checkbox"/> Indifferent	10 (31,3%)	3 (11,5%)	4 (40%)
<input type="checkbox"/> Problematical	16 (50%)	13 (50%)	5 (50%)
<input type="checkbox"/> Very problematical	4 (12,5%)	7 (26,9%)	1 (10%)

In the following table you see a list of possible influencing aspects that may cause problems related to the transition of graduates with specific needs into the labour market.

Please mark to which extent these aspects influence the deterioration of the situation for the transition of graduates with disabilities into the labour market in your country and put a tick where appropriate!

We displayed the country's overall mean (green: an aberration from 0.5 to 1pt between the countries, red: aberration exceeds 1pt)

"1" was for "not influencing" (no influence)

"2" was for "indifferent" (little influence)

"3" was for "influencing" (medium influence)

"4" was for "most influencing"(high influence)

In the last column, the participants had the possibility to add a short comment (not yet evaluated).

Possible Aspects	A	G	S	Comments
1) Lack of guidance and counselling services for graduates with special needs	2,33	3,18	1,82	Notable difference
2) Lack of technological support, assistive technologies and assistance	2,12	3,11	n.m.	Notable difference
3) Lack of contacts and cooperation between disability organisations and companies/potential employers	3,27	3,11	n.m.	
4) Financial situation-lack of financial assistance	2,55	2,85	n.m.	
5) Legal restrictions and legal conditions	3,18	2,57	n.m.	Notable difference
6) Lack of information of the social environment about disability issues	3,30	3,68	n.m.	
7) Bureaucracy	3,00	2,93	n.m.	
8) Attitudes (prejudices, discrimination) of potential employers concerning the abilities of people with disability	3,36	3,46	n.m.	
9) Lack of workplace access	3,12	3,04	n.m.	
10) Lack of Accessibility concerning office buildings	2,91	3,19	n.m.	
11) Qualification and education of graduates with special needs do not fit the demands of potential employers	2,15	2,82	n.m.	Notable difference
12) Lack of public relation and marketing that promote the abilities of people with special needs	3,15	3,04	3,00	

Possible Aspects	A	G	S	Comments
13) Lack of awareness raising events and disability awareness programmes	3,15	2,89	3,09	
14) Fear of contact with people with disabilities by the general population	3,00	2,96	3,09	
15) Fear people with disabilities with regard to interaction with the society	2,36	3,00	2,36	Notable difference
16) Health problems, medical problems persons with disabilities are confronted with	2,48	2,43	3,18	Notable difference
17) Companies are afraid of disadvantages resulting from employing a person with special needs.	3,48	2,86	3,91	Notable difference
18) Firms are afraid of organisational / structural problems resulting from employing a person with special needs.	3,33	2,96	3,36	
19) Critical situation of the labour market in general	3,36	3,14	3,45	
20) Assumed lack of mobility / flexibility of people with disabilities	3,27	3,00	2,36	Notable difference
21) Actual lack of mobility / flexibility	2,64	3,04	1,91	Notable difference
22) Social isolation and segregation of people with special needs	2,48	3,00	2,82	Notable difference
23) Assumed low self-esteem and lack of initiative of people with special needs	3,06	2,78	2,36	Notable difference
24) Actual low self-esteem and lack of initiative of people with special needs	2,52	3,19	1,73	Notable difference
25) The latent image of people with disabilities in the society	3,03	2,82	3,09	
26) Deficits in structure and impact of representation of interests of people with special needs	2,82	3,07	1,64	Notable difference
27) Proprietary labour market structures which are considered as "more adequate" for people with disabilities than the open labour market	2,18	3,07	2,18	Notable difference
28) Achievement – oriented society	3,30	2,96	1,91	Notable difference
29) Prevalent political system and environment	2,97	2,86	2,45	
30) Barriers to gaining adequate education and qualifications	2,88	2,96	2,45	
31) Lack of occupational images for graduates with special needs	2,88	3,43	2,55	Notable difference
32) Employment Centers are not competent for servicing graduates with special needs	2,73	3,29	3,09	Notable difference

Demographic Data

Are you a person with a disability?	A (n=32)	G	S (n=7)
<input type="checkbox"/> Yes	13 (40,6%)	n.m.	1 (14,3%)
<input type="checkbox"/> No	19 (59,4%)	n.m.	6 (85,7%)

What type of disability characterise(s) your personal situation best?

	A (n=14)	G	S (n=3)
<input type="checkbox"/> People with Motor Disability	8 (61,5%)	n.m.	0
<input type="checkbox"/> Blind and Partially Sighted	3 (23,1%)	n.m.	0
<input type="checkbox"/> Deaf and Hard of Hearing	1 (7,7%)	n.m.	1 (33,3%)
<input type="checkbox"/> People with learning disorders	0	n.m.	0
<input type="checkbox"/> People with psychic disorders	0	n.m.	0
<input type="checkbox"/> Mentally challenged persons	0	n.m.	0
<input type="checkbox"/> People with multiple disabilities	0	n.m.	0
<input type="checkbox"/> Others: _____	2 (15,4%)	n.m.	2 (66,7%)
<input type="checkbox"/> I would rather not answer this question	0	n.m.	0

Austria – other types of disability: physical (1), “little impaired”

Sweden – other types of disability: asthma (1)

How many years have you been working in the field of (higher) education, integration & disability?

	A (n=32)	G	S (n=7)
<input type="checkbox"/> less than 1 year	2 (6,3%)	n.m.	0
<input type="checkbox"/> 1 – 3 years	6 (18,8%)	n.m.	1 (14,3%)
<input type="checkbox"/> 4 – 10 years	13 (40,6%)	n.m.	4 (57,1%)
<input type="checkbox"/> 11 – 15 years	9 (28,1%)	n.m.	2 (28,6%)
<input type="checkbox"/> 16 – 20 years	1 (3,1%)	n.m.	0
<input type="checkbox"/> more than 20 years	1 (3,1%)	n.m.	0

Gender:

	A (n=32)	G	S (n=8)
<input type="checkbox"/> female	20 (62,5%)	n.m.	7 (87,5%)
<input type="checkbox"/> male	12 (37,5%)	n.m.	1 (12,5%)

This paper was delivered at Seminar 7 in Glasgow.

A paper copy of this deliverable is held on file.

Annex 5

DELIVERABLE N° 40

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton

Reference period (see technical annex): from 1 Nov 03 to 30 Apr 04

Date of issue of this report: 30 April 2004

HERN Seminar 7

“Key Features of Teaching and Learning in the University of Tomorrow”

Strathclyde University, Glasgow

21-24 January 2004

PROGRAMME

Wednesday, 21 January 2004 (Glasgow University)

16:30 - 17:30 Steering Group meeting,
18:00 Welcome Reception & Buffet

Thursday, 22 January 2004 (Senate Court, Strathclyde University)

09:30 -10:00 **“Change Strategies in Teaching and Learning,”** George Gordon,
Centre for Academic Practice, University of Strathclyde

10:00 -11:00 Discussion on topics:

What should feature in a teaching and learning strategy?

How should they be generated (ie, who should contribute)

Is change happening in the balance of relationships/responsibility for teaching and learning between individual teachers, disciplines and institutions? If so what changes are occurring, what is causing these changes and what are the implications of them?

Specifically in what ways are the requirements of external quality assurance influencing teaching and learning strategies and practices?

How are the interests/expectations of employers impacted upon teaching and learning strategies

What are the implications for teaching and learning strategies of growing use of online resources, virtual learning environments etc?

What are the burning issues in relation to teaching and learning in your context/experience?
What are the implications of these for strategy and for practice?

What should feature in a teaching and learning strategy designed to prepare students for the 21st century?

11:00 -11:20 *Coffee Break*

11:20 -12:00 **“Developments in the issues relating to gender in higher education”**
Professor Heather Eggins, SRHE

12:00 -13:00 Discussion on relevant topics

13:00 - 14:00 *Lunch*

14:00 – 15:00 **“Re-using online resources: a sustainable approach to e-learning,”**
Professor Allison Littlejohn, University of Strathclyde

15:00 – 15:30 Country presentation

15:30 -16:30 Discussion on relevant topics

Friday, 23 January 2004

- 9:30 -10:15 Country presentations
- 10:15 -11:00 Discussion on relevant topics
- 11:00 -11:20 *Coffee Break*
- 11:20-11:50 **“Report: Situation Analysis and tendencies,”** Professor Mararita Teresevicene and Vaiva Zuzeviciute, Vytautas Magnus University, Lithuania
- 11:50-12:40 Discussion on relevant topics:
- Which perspective on HE (labor market orientation versus liberal tradition) should be emphasized in tomorrow’s university?
 - How do changes of client’s profile (process of massification of university) challenge universities, teaching/learning perspectives in particular?
 - What innovations in terms of teaching/learning do you observe? Which of these should be further promoted?
 - Which innovations are designed to suit needs of marginalized student (disabled, minorities)?
 - In which way pedagogical practice in HE is influenced by ideas of lifelong learning and non-traditional students who bring to tertiary education their life/work experiences?
 - Which innovations in teaching/learning practice seem to be most favourable for creating EU HE space?
 - What are the main obstacles in implementing perspective innovations?
- 13:00 - 14:00 *Lunch*
- 14:00 -15:30 Disability Research Group meeting
- 19:00 *Dinner (University of Strathclyde)*

Participants

Austria

Andrea Petz

Barbara Hengstberger

Czech Republic

Libor Novacek

Helena Sebkhova

Andrej Svaton

Greece

Despina Dsidiropolou

Katerina Argyropoulou

Latvia

Ilze Buliginia

Juris Dzelme

Lithuania

Vaiva Zuzeviciute

Margarita Teresevicene

Poland

Marek Frankowicz

Agata Kozielska

Sweden

Helge Stromdahl

Tina Tejlestedt

UK

Myszka Guzkowska

Ivan Kent

Heather Eggins

Betty Woessner

Questionnaire

Key Features for Teaching and Learning in Tomorrow's University

HERN, Glasgow, 2004

In order to sketch a general idea about the main changes in teaching and learning perspectives that we are witnessing in our countries of partnership, we would like to ask you to complete this questionnaire. Opinions of your colleagues, yourselves, and, possibly, students would be meaningful in discerning trends. Grateful, co-coordinators of WP 10: SRHE, Surrey Roehampton University (UK), Vytautas Magnus University (Lithuania)*

Country: <input type="checkbox"/> A <input type="checkbox"/> BG <input type="checkbox"/> CZ <input type="checkbox"/> LT <input type="checkbox"/> LV <input type="checkbox"/> PL <input type="checkbox"/> SE <input type="checkbox"/> UK	
1.	Which of the approaches to learning in today's university should be emphasized? (<i>please, rank; 1 – 'definitely agree'; 5 - 'definitely disagree'</i>)
	Lifelong learners are fostered in higher education Knowledge and skills are most important Critical/reflexive thinking is what matters Economic and social development is the final goal of learning Learning in higher education is learning to be a citizen Other
2.	Please, explain the preference
3.	Which of the approaches to learning in practice of today's university are emphasized? (<i>please, rank; 1 – 'definitely agree'; 5 - 'definitely disagree'</i>)
	Changing perspectives Development of a personality and becoming a citizen Acquisition of knowledge and skills Development of concepts, understanding Application and practice Other
4.	Please, explain the preference
5.	Which of the approaches to teaching should be the practice of advanced university of tomorrow? (<i>please, rank; 1 – 'definitely agree'; 5 - 'definitely disagree'</i>)
	Teaching is presenting ample information and helping with the assessment Teaching is all about organizing and facilitating active learning Teaching is prompt feedback, emphasis on changed competencies in a field Good teachers facilitate development of citizens Teaching is discussing ideas, problem solving, probing perspectives, and development of understanding Other
6.	What positive recent changes can you identify in practice of teaching/learning in higher education? What prompted them?
7.	What are the main problems in changing teaching/learning practices in higher education in your country? Why?

**based on ideas of:* Barnett, R. (1997) *The Idea of Higher Education*. The Society for Research into Higher Education and Open University Press; Ramsden, P. (1994) *Learning to Teach in Higher Education*, Routledge London and New York; Prosser, M., Trigwell, K. (2001) *Understanding Learning and Teaching. The Experience in Higher Education*, OUP

HERN - Glasgow - Friday morning session

Speakers: Marek (PL), Libor (CZ), Juris (LV)

1. Marek (Poland) - Some general remarks on innovations in HE. A model for encouraging innovation in HE (paper to be produced for HERN).
2. Libor (Czech Rep) - Innovation Strategies for HE - Bologna Declaration & Prague Communiqué (paper produced for HERN).
3. Juris (Latvia) - Emotions in Art in Education - (paper produced for HERN).

Key Discussion Points from Marek's paper for policy recommendations: *Some general remarks on innovations in HE. A model for encouraging innovation in HE (paper exists)*

1. Need to encourage HE institutions to develop systems to keep good ideas alive in the academic environment until the opportunity/timing is right to develop the idea. This may require funding to develop "Knowledge Transfer" brokers within all HEIs. A key role of these brokers would be to capture internal knowledge and to make links by reaching outside the HEI so as to identify potential new markets in business and the community so that knowledge can be transferred from the HEI eg the UK model developed by HEFCE for HE Innovations Fund (HEIF).
2. Need to help HEIs to develop their alumni groups so as to ensure that students are continuously brought back into the HEI for CPD, and other LLL opportunities. Alumni groups can provide the first contact with many businesses and may allow networks to be developed for different business sectors so as to enable HEIs to identify new education and training needs which are directly relevant to business and the community. This will require funding, some of which may come from Government funds, others of which may come from developing tax breaks for business organisations which encourage businesses to interact with businesses.
3. Encourage knowledge transfer from all discipline areas. There are many examples of knowledge transfer from Science, Engineering and Technology developments in HEIs. Yet more than half of the University sector in most countries is comprised of Arts, Humanities, Culture, Social Sciences and Education; it is more difficult to develop knowledge transfer in these areas but the potential is there and more effort should be made to encourage development in these areas.
4. Recognise and develop the important role of Arts, Humanities, Culture, Social Sciences and Education related disciplines in producing leaders in Knowledge Societies, in developing creativity for innovations in business and the community, in developing attitudes towards society in general and in developing an understanding of ethics to tackle problems in both the profit and not-for-profit sectors. Ideally, this requires the development and funding of some cross-disciplinary and trans-national work.

Key Discussion Points from Libor's paper for policy recommendations: *Innovation Strategies for HE - Bologna Declaration & Prague Communiqué (paper produced for HERN)*

1. More work is required to improve existing accreditation systems and so as to encourage trans-national LLL. Attention needs to focus on access, CATS and funding issues across national boundaries.
2. Steps need to be taken to address the brain drain issue which will occur after the 10 new accession countries join the EC in May 2004.
3. Need to encourage multi-country development of distance learning materials and delivery.

Key Discussion Points from Juris's paper for policy recommendations: *Emotion and Art in Education (paper produced for HERN)*

1. The State needs to recognise how Art can contribute to a Knowledge Society and to support. It is important to recognise that the contribution and value of Art-related subjects to Knowledge Societies is often difficult to evaluate in tangible financial terms and that financial support from the State may be required to introduce innovations both in teaching and learning and in Knowledge Transfer activities in these disciplines.

2. There is a need to carry out research which helps EC Member States to understand what contribution Arts and Humanities disciplines can make to a Knowledge Society. This research would bring together the themes of "Emotional Intelligence in HE", of "Neuroscience and the Human Brain for Teaching & Learning", "Art, Emotions and Ethics in HE", and "The Role of Arts in the development of the Economy and Society".
3. There is also a need to develop joint curricula across EC partner countries which incorporate Arts & Humanities disciplines into all Science, Engineering and Technology education in HE so that students are able to develop creativity for innovations, as well as well-developed attitudes and solutions to ethical problems in business and the community.

ACTION:

Research Theme: (Framework 6?)

Latvia - Juris - Art & Emotion in Teaching and Learning

Sweden - Helge - Neuroscience & the Human Brain for Teaching & Learning

UK - Heather - Emotional Intelligence and Education

Poland - Marek/Mielecka - Krakow paper from Work Package 9

UK - Myszka/Ivan - The Role of Arts/Humanities Disciplines in Reaching Out to Business & the Community

Austria - Andrea - How to encourage innovations in Arts/Humanities for the Knowledge Society

Practical Theme: (Leonardo or Grundwig)

Curriculum development to encourage Arts/Humanities contribution to Knowledge Economy of leaders, development of creativity for business and the community, development of products for Knowledge Society eg. Therapies, Creativity, Ethics).

HERN Seminar 7

Report of Workshop Session 1 - Group 3

Greece - Despina, Latvia - Juris, Lithuania - Margareta, Poland - Agata, England - Ivan

Question 8 - What should feature in a T&L strategy to prepare students for the 21st century

Lithuania - There is a need to change from a 'knowledge acquisition' model to a 'problem solving model'. The future needs will demand more in the way of critical thinking skills allied to identification and solving of problems.

Latvia - agreed but more emphasis on identifying the problem - new problems, seeking out new knowledge and ways of doing things. There is also an element of the cultural situation - which involves changing/reversing pre-existing political procedures, structures and ways of thinking.

Greece - a traditional system - (based primarily on experience in Arts) the main universities are full-time and only the open university takes part-time and non-traditional students - but, not all subjects fit into this delivery model - eg, Psychology cannot be delivered via the GR OU. The need is to change HE to provide more flexible learning opportunities taking into account economic pressures, work-patterns, employment needs, multiculturalism etc...

Poland - Lifelong learning is becoming more and more important. The need is to develop flexibility for the future - not just changes in courses - and to address increasing multicultural influences.

Question 7 - What are the burning issues in relation to T&L.

The burning issue was fees and how to pay them:

Latvia has selective entrance exams that lead to funding for 25% of students in HE (but at a very low level). The rest have to pay both in state and private institutions.

Poland - similar to Latvia - limited support for students depends on success in entrance and progress exams. Rest self fund

Greece - ALL HE is free... *and we ran out of time*

Summary

Q8: A T&L strategy for the 21st Century must:

1. Help students to become more flexible: they need to develop self-reliance skills to cope with a future employment market that will not guarantee them "a career" but rather a portfolio of employments that it is up to them to manage effectively. This mirrors their experience of learning in the mass market educational institutions in which they will study: they have to manage their learning as a portfolio of learning opportunities within a context that may require them to work and manage family commitments as well.
2. Help staff become (and remain) more flexible too: they are expected to be able to be expert learning enablers in all situations and with all types of students and cope with a wider range of abilities and problems than ever before while having less security and more scrutiny than previously.
3. Develop properly portable and transparent (across an Europe of 25+ nations) systems to recognise, accredit and quality assure non-traditional (including occupational and work-based) and informal learning, especially for part-time, distance, older and non-traditional students.

Q7. The challenge for HE will be to be able to deliver all of this within a financing structure that is both inclusive and affordable (individually and collectively).

Greece - Despina, Latvia - Juris, Lithuania - Margareta, Poland - Agata, England - Ivan

Question 6 - Which innovations in T&L practice seem to be most favourable for creating EU HE space?

1. Quality assurance - or rather the influence of quality assurance on pedagogical practice. There were two aspects to this, first the processes of internal quality improvement and second the external pressure to harmonise procedures.
2. The Diploma Supplement - since this offers a way of facilitating transparency and portability of qualifications between national HE systems.
3. Common study programmes and joint actions - where students study in different institutions either as part of inter-institutional collaborative study programmes or study exchange schemes.
4. But, innovations in one area (subject or place) are not always applicable in another, or may be adopted more slowly/quickly.

Question 5 - In which way pedagogical practice in HE is influenced by ideas of lifelong learning and non-traditional students?

1. Lifelong learning broadens the profile of the HE learning community and also is a force for integrating HE more closely with the external environment.
2. The broader profile of learners means that there is also a wider spectrum of needs, which challenges HE to adapt and accommodate: a matter often of changing attitudes
3. There are expectations that HE will recognise learning and ways of learning over which HE itself has no control or influence.

Summary.

It was felt that Q6 was concerned with systemic enabling measures that were broad scale and essentially driven from the top down. Innovations here were largely concerned with enabling transferability and transparency of credits/qualifications.

In contrast, Q5 identified a bottom-up driver for change where learner's needs were individual and had to be addressed individually (or at least local or small scale)

Caught in between was HE which had to meet both broad system-wide requirements and the very narrowly defined needs of individual learners. It was felt that if HE institutions were able to balance both these forces it would produce useful change in generally the right direction...

HERN Project
Management Meeting
Wednesday, 21 January 2004
Glasgow

Agenda

1. Project manager's report Year 2 (Ivan Kent):
 - (a). Year 2 progress report
 - (b). Year 2 finances
 - (c). Spin-off/parallel developments

2. Planning for Year 3 (Ivan Kent)
 - (a). Deliverables
 - (b). Seminar 8 - Kaunas
 - (c). Seminar 9 - Prague
 - (d). Disability research group
 - (d). Dissemination

3. Continuation planning (Ivan Kent)

4. Electronic media and communications (Betty Woessner):
 - (a). eForum to follow Glasgow seminar - practical arrangements/plans/timing
 - (b). eForums to follow Kaunas and Prague seminars - agree format/structure/timing
 - (c). Web-site
 - (d). Interactive CD ROM

5. AOB

Annex 6

DELIVERABLE N° 41

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton

Reference period (see technical annex): from 1 Nov 03 to 30 Apr 04

Date of issue of this report: 30 April 2004

Seminar 7

eForum report

Following poor response to the previous models of the eForum it has been decided to experiment with a different format again.

It had been perceived previously that the limited interaction might have been a consequence of some limitations in the material made available for discussion. In general this meant notes of the outcomes of the seminar. It was felt that while this might have been sufficient for those who were present at the seminar it did not provide sufficient detail for anyone who had not been present.

Therefore it has been decided to produce the conference paper first, to circulate it and then to hold the eForum.

The partner responsible for Seminar 7 has reported that the paper is in preparation by an academic at Strathclyde University and is presently being discussed among the principal responsible partners prior to wider circulation, after which the eForum will be held.

The target is to complete the eForum in June 2004.

Annex 7

DELIVERABLE N° 42

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton

Reference period (see technical annex): from 1 Nov 03 to 30 Apr 04

Date of issue of this report: 30 April 2004

Seminar 7

Conference paper

“Key theoretical issues and strategies for changing pedagogic practice”

Professor George Gordon

Centre for Academic Practice, University of Strathclyde

The paper is in preparation and is presently being discussed among the principal responsible partners prior to wider circulation, after which the eForum will be held. The paper will be revised in the light of eForum comments and will be completed by the end of June 2004.

Annex 8

DELIVERABLE N° 43

RESTRICTED

Contract nr: HPSE-CT-2001-50011

Title: Higher Education Reform Network (HERN)

Project coordinator: University of Surrey Roehampton

Reference period (see technical annex): from 1 Nov 03 to 30 Apr 04

Date of issue of this report: 30 April 2004



Vytautas Magnus University

Seminar 8

***Distance Education And
The Use Of Technology
For Tomorrow's
Knowledge Society***

LT/LV

Kaunas, Lithuania, 22– 24
April, 2004



Partners

LT/LV, UK SRHE, UK USR, A, Cz, PL

Objectives

To explore the relationship between distance learning strategies and opportunities for inclusion in tomorrow's knowledge society

To exchange and integrate existing conceptual frameworks for ODL case studies throughout Europe and lessons learned for the future

To analyse market demands, needs, quality and resources for distance learning methods

Deliverables:

Seminar papers: "Case studies from PHARE programmes" "Distance learning and inclusion for tomorrow's knowledge society"

Report of website discussion to EC and associated networks

Conference paper: Evaluating management of change strategies for ODL study programmes across Central and Eastern Europe

Chapter for brief guide to policy: 'HE reform, teaching and learning, change and quality: student diversity, distance learning and guidance

Expected results:

The workpackage will provide:

policy makers, practitioners and academics with comparative, analytical findings about practical and theoretical considerations pertaining to open and distance learning in different social, economic and political contexts, with reference to management of change and widening participation.

Distance Education And The Use Of Technology For Tomorrow's Knowledge Society

PRELIMINARY AGENDA

Venue of the seminar: Vytautas Magnus University, K. Donelaicio str. 52, Kaunas, Lithuania

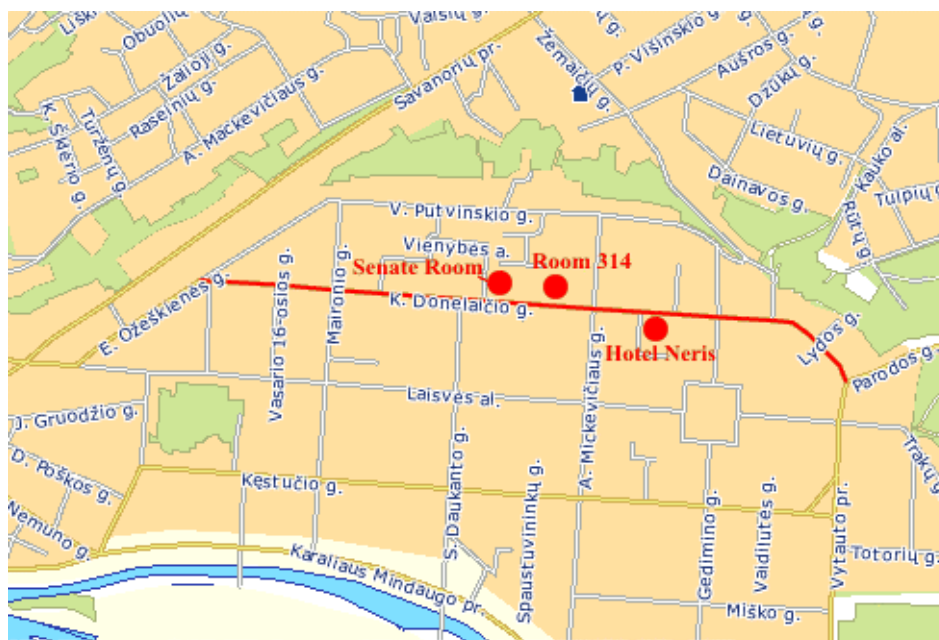
Time	Activity	Notes
Thursday, 22 April, 2004		
<i>Meeting of steering Committee</i>		<i>Senate Room K. Donelai_io str. 58</i>
5.00 - 5.30 pm	Welcome to Vytautas Magnus University	<i>Vice rector for International Affairs</i> K. Pukelis
5.30 – 7.00 pm	Meeting of Steering Committee	<i>Ivan Kent</i>
7.15 – 8.30 pm	<i>Buffet</i>	Hotel Neris
Friday, 23 April, 2004		
<i>First session: moderator Margarita Tereseviciene</i>		<i>Room 314</i>
9.00 – 9.45	ICT aspects in the modernization of study proces in HE	Dr. D. Rutkauskiene Kaunas University of Technology Kaunas Regional Distance Education Study Centre
9.45 – 10.00	Towards Virtual University. VMU Case.	Dr. A. Mickus Vytautas Magnus University Centre of Distance Eduction
10.00 – 10.30	Discussions	<i>Room 314</i>
10.30 – 10.50	<i>Coffee break</i>	<i>Room 423</i>
10.50 – 12.00	Country presentations PL Experiences of Polish virtual universities and centres of ODL UK1 Tendencies: DE and Tertiary Education? A?? NL?? UK2?? CZ??	Adam Chmielewski Damian Day Petra
12.00 – 1.30 pm	<i>Lunch</i>	<i>Restaurant Zalias ratas, Laisv_s al_ja 36 b</i>
<i>Second session: moderator Ilze Buligina</i>		<i>Room 314</i>
1.30 – 2.00 pm	Application of electronic technologies to improve accesibility of HE in Latvia.	Dr. Ilmars Slaidins, Riga Technical University, Faculty of Electronics and Telecommunications
2.00 – 2.30 pm	Development of adult students as self-directed learners in distance-learning courses - experience from Latvia	Ilze Norvele, Ph D student, Institute of Pedagogy and Psychology, Univeristy of Latvia
2.30 – 3.00 pm	Discussions	<i>Room 314</i>

3.00 – 3.30 pm	Coffee break	Room 423
Third session: moderator Vaiva Zuzeviciute		Room 423
3.30 – 5.00 pm	Group discussions and presentations	Rooms 423, 322
3.30 – 5.00 pm	Starting interviews for CD	Room 314
7.00 pm	Start from the hotel	
7.30	Dinner	Restaurant Avily's, Vilnius str. 34
Saturday, 24 April, 2004		
Last session: moderator Ivan Kent		Room 423
9.00 – 10.00	Summarisation of ideas and contributions in the light of policy guide development (draft)	Rapporteur Ram_nas Kuncaitis
10.30	Interviews for CD	Room 314
1.00 pm	Lunch	Restaurant Zalias ratas Laisv_s al. 36 b

NOTE: We would kindly ask presenters develop questions for triggering discussions and to send both questions and presentation by 5 April.

Dear Colleagues,

We hope this map will be helpful. Hotel and seminar venues are pointed. Kaunas is a small place – it'll take you 10 minutes from hotel to University (Donelai_io str. 58 and Donelai_io str. 52 (these buildings are just next to each other) on foot. Anyway, on April 22 I'll be downstairs, at 4.50, and will accompany you to Senate room for the Steering Committee Meeting.



Arrivals

To Airport

Note: it takes approx. 1.5 – 2 hours to get from Vilnius airport to Kaunas. For those who are coming to this airport we suggest to hire a taxi or minibus, especially, if several people come from the same country. We also may try to organize ourselves, if arrival times are “friendly” could we wait for each other, if it’s not too long, of course?. Then we’ll organize a minibus to travel to Kaunas, and, probably back (if the flights are not too dispersed!). That’ll cost Taxi (three people): 50 EUR or Mini bus (eight people): 74 EUR or you’ll have to take taxi from Vilnius airport to Vilnius bus station (3 EUR, 10 Lt, you’ll have to have cash!); then take a bus (during a day – every 35 – 40 minutes or so) to Kaunas (1.5 hours, 3.5 EUR, 12 LT, cash as well), then take a taxi to hotel again (2,5 – 3 EUR, 8 – 10 LT).

To Train station

I know already that at least Polish colleagues are coming by train, to Kaunas train station. In that case you may take a taxi, 2,5 - 3 EUR, 8 – 10 LT; cash, of course). ***With some of driver’s there may be problem with getting a bill, but they should give it, according to regulations***☺.

Seminar

Multimedia, overheads projector will be provided. If things go as planned, we’ll broadcast the event to Your institutions, if there happens to be interested colleagues. We’ll send Internet address in order to download the software and follow the event.

Accommodation

We reserved hotel **NERIS**, it is in the very centre, just next to Vytautas Magnus University (Donelaicio str. 27) Single – 40 EUR and Double – 52 EUR Hotel is moderate, but clean ☺)
More about it: http://www.accommodation-source.com/hotels/KUN_kaunas/best_eastern_takioji_ner.html

Other

We have a jazz festival at that time, if you are interested in programme, here is the site:

<http://www.kaunasjazz.com>

Information about restaurants: <http://www.kaunas-online.com/dining.htm>

Meanwhile you can find information about Kaunas at the site: <http://www.kaunas.lt>

and the map is available at: <http://www.maps.lt/redirect.asp> or
<http://www.maps.lt/redirect.asp?l=1&username=httpwww.maps.lt>

HERN Project Management Meeting

Thursday, 22 April 2004

Kaunas, Lithuania

Agenda

1. Deliverables:

- a. Deliverables seriously overdue during this period (Nov 03 - Apr 04):

Deliverable 37 (WP 8 – KTH, Sweden): Chapter for brief guide to policy on 'Internal management, gender and staff development in HE in the context of reform & EU enlargement' - Due November 2004 – *5 months overdue*

Deliverable 38 (WP 9 – JU, Poland/CHES Czech Republic): Chapter for brief guide to policy - "Relations with the State and quality in HE" - Due November 2004 – *5 months overdue*

- b. Deliverables due by 30 Apr 04):

Deliverable 41 (WP 10 – SRHE, UK): Report of eForum/website discussion – Due by March 2004

Deliverable 42 (WP 10 – SRHE, UK & VMU, Lithuania): Conference paper on Key theoretical issues and strategies for changing pedagogic practice – Due by April 2004

2. Finances

Year 3 Advance. *Delayed, assured by EC on 16 April that payment is in final stages of approval for payment*

Final Year budgets. *All partners are asked to review their expenditure incurred 1 Nov 03 to 30 Apr 04 and to estimate their expenditure in the final six months.*

3. Reports

- a. Project manager's report. *Report due to EC at end April. Present concern is with long overdue policy deliverables.*
- b. Partner's progress reports. *All partners are asked to report on their progress during the period:*
- (1). Work completed or in progress this period (Nov 03 to Apr 04)
 - (2). Work planned or in progress that is due for completion in final 6 month period (May to October 04).
 - (3). Problems – reasons, solutions and likely effects on project

4. Work next period

- a. Seminar 9 – Prague.
- b. Disability Research Group
- c. Dissemination

4. Any other business

List of Participants

<i>Name</i>	<i>Surname</i>	<i>Country</i>	<i>Notes</i>
Libor	Novacek	CZ	novacek@csvs.cz
Jan	Kohoutek	CZ	kohoutek@csvs.cz
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Ivan	Kent	UK (USR)	i.kent@synergenesis.com
Heather	Eggins	UK (SRHE)	heathereggins@srhe.ac.uk
Betty	Woessner	UK (SRHE)	HEReform@aol.com betty@srhe.ac.uk
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Ilmars	Slaidins	LV	
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Juris	Dzelme	LV	
Martins	Eizentals	LV	
Margarita	Teresevi_ien_	LT	m.tereseviciene@smf.vdu.lt
Genut_	Gedvilien_	LT	g.gedviliene@smf.vdu.lt
Elena	Mick_naite	LT	e.mickunaite@smf.vdu.lt
Ram_nas	Kuncaitis	LT	r.kuncaitis@smf.vdu.lt
Danguol_	Rutkauskien_	LT	danrut@uni.ktu.lt
Art_ras	Mickus	LT	a.mickus@smf.vdu.lt
Audron_	Valiuskevi_i_t_	LT	a.valiuskeviciute@smf.vdu.lt
Vaiva	Zuzev_i_t_	LT	v.zuzeviciute@smf.vdu.lt
Vida	_viniene	LT	vida@dmc.vdu.lt

Questions for Discussions (Saturday, 24 April)

1. Technology - role/impact/benefit - particularly:

- a. Is technology a delivery tool (ie, teacher driven), or is it an enabling environment (ie learner driven)?
- b. Accessibility - at what level do you set the technological threshold for access (ie, from home or from a centre; dial-up or DSL; all operating systems, or just the most popular; all versions of an operating system, or just the most recent? what software requirements... etc etc)
- c. Access - how do you support the learning needs of those who cannot access the learning whether because of disability, financial, domestic or other reasons?

2. Purpose - why does Higher Education need to engage in distance education?

- a. Is DE merely an additional delivery channel for otherwise existing learning?
- b. Is DE a way of reaching NEW learners or learning constituencies?
- c. Is DE a way of exploring new fields of learning, new subjects, new visions of knowledge?
- d. Is DE a way of cutting costs (either for HEIs or for individual learners)?

3. Reach - where does an HEI draw the borders of its virtual provision?

- a. Locally - ie, does the HEI stay within its traditional geographical boundaries (even though in a virtual environment): if so, why the limits?
- b. Borderless - ie, does the HEI seek to co-operate and/or compete far beyond its geographic catchment: if so, how and with what intended outcome?

Questions for interviews of participants within the EU 5th Framework project "Higher Education Reform Network"

1. Presentation of speaker
2. What are the main conclusions you have arrived at concerning the higher education reform in Europe - as a result of the implementation of the HERN project?
3. What could you suggest to European decision makers as the next visible decision concerning HE further development?
4. What are the key challenges for European Universities in transfer to knowledge society?
5. Do you see the established organisation culture of universities as value, opportunity, or obstacle to European competitiveness?
6. Please, mention some of the most important signals from EU institutions, which contributed to development of universities in your country?
7. What are the main obstacles in fast transfer to knowledge society – technology, leadership, organisational culture, or vague goals of development?
8. Could you mention other important conclusions you have arrived at during the project. Do you have other relevant comments as to the procedure and results of the project.

Areas:

Governance: should higher education be 'owned' by the state (in the

- o sense that the institution and faculty are, effectively, state owned
- o facilities and state employees respectively). If the answer is 'no', then
- o where do you draw the line for state involvement?

Quality assurance: who should be responsible for quality assurance -

- o state (specify whether you mean local/regional, national or supra-national)
- o or institution or individual faculty and learner - or something else
- o altogether? And, whichever you choose - quis custodiet custodiet?

Qualifications: to what extent are the qualifications awarded by your

- o national he institutions accepted in other countries and/or by other
- o countries' HEIs, professional bodies, employers etc...?

Citizenship: to what extent does your HE system prepare its graduates

- o be citizens in the expanded Europe? please expand on what general concept
- o of citizenship this preparation may be based on and to what extent is it
- o national, to what extent European?

Seminar record and outcomes

The seminar was conducted 'on camera' and went out live over the internet as a simulcast. A record of the presentations and discussions has been archived. The documents presented at the seminar were also archived. Access to recordings of the seminar and to the documents is available until Decemebr 31 2004 at the following internet address:

<http://distance.ktu.lt/vips/join.php?sr=94&l=en>