

# The Fundamental Values of Higher Education in the European Higher Education Area - EHEA

Technical framework to monitor and assess fundamental values

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## 1. Policy Context and Timeline

The fundamental values of higher education have formed the basis for the development of the European Higher Educating Area (EHEA) since its very beginning. They were, however, largely taken for granted and were not the subject of systematic consideration until 2015. By that time, the fundamental values had come under increasing pressure in several EHEA Member States, and their promotion and protection became an urgent matter (Craciun and Mihut, 2017; Matei, 2020; Bergan and Matei, 2024).

The response to this worrying historical situation has been remarkable: EHEA Member States have jointly developed a new and potentially effective framework of reference for fundamental values, including a clearly defined list of values, shared conceptual reference points for each of them<sup>1</sup> (Matei and D'Aquila, 2024), and concrete commitments regarding their protection and promotion.

These developments are unprecedented. They have the potential to significantly contribute to better adapted policy and legal environments in the EHEA member countries, thus better supporting higher education institutions to pursue and fulfil their fundamental mission, which is the production, transmission, and dissemination of knowledge as a public good through education, research, and civic engagement (Bergan and Matei, 2024).

To achieve this aim, several steps have been taken in the EHEA. The main milestones in the policy timeline and development process are as follows:

- **In 2018**, after having observed that the “fundamental values [were] challenged in recent years in some of our countries” (EHEA, 2018), the EHEA members jointly identified and officially adopted for the first time – as part of the Paris Communiqué – a joint and clear list of fundamental values of higher education, as follows:

- academic freedom

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<sup>1</sup> For instance, academic freedom in the EHEA is defined as “freedom of academic staff and students to engage in research, teaching, learning and communication in and with society without interference nor fear of reprisal” (EHEA 2020b). This represents a shared ‘conceptual reference’ in the EHEA. “Conceptual reference” is understood to be not only a definition or a link to an existing definition, but a sufficiently long conceptual elaboration available in a text format that serves as a common reference or go-to conceptual source (or “anchor”) for actors inside and outside the university, and which they use in sync for the understanding, codification and practice of academic freedom (Matei 2024). A framework of reference for values such as academic freedom generally includes a conceptual reference but also guidelines for the practice and protection of academic freedom, elements of codification (such as norms, regulations, codes of conduct, etc.), and provisions about institutions and institutional mechanisms that should or could be utilized to implement the respective understanding and codification of this value (Matei and D'Aquila, 2024).

- academic integrity
- institutional autonomy
- participation of students and staff in governance
- responsibility *for* higher education
- responsibility *of* higher education.

At the same time, member states made a strong and explicit commitment “to promoting and protecting them in the entire EHEA through intensified political dialogue and cooperation” (EHEA, 2018).

- In 2020, the EHEA members reaffirmed their commitment to uphold, promote and protect the shared values adopted in the Paris Communiqué, seeing this as “the necessary basis for quality learning, teaching and research as well as for democratic societies” (EHEA, 2020a). Ministers recognized that achieving this ambitious vision requires taking concrete actions such as “**enacting policies and implementing measures** in our national frameworks, some of which will go beyond our higher education systems and will entail **alignment of wider national economic, financial and social strategies**” (EHEA, 2020a, emphasis added).

To ensure a common understanding of the fundamental values of higher education in the EHEA, ministers adopted a statement on academic freedom in an Annex to the Rome Communiqué (EHEA, 2020b) and agreed to develop and adopt statements with shared definitions for the other five fundamental values as well. These statements represent the shared conceptual references for the fundamental values of the higher education in the EHEA (Matei and D’Aquila, 2024).

Moreover, the ministers tasked the Bologna Follow-up Group (BFUG) to “develop a framework for the enhancement of the fundamental values of the EHEA that will foster self-reflection, constructive dialogue and peer-learning across national authorities, higher education institutions and organisations, while also **making it possible to assess the degree to which these are honoured and implemented in our systems**” (EHEA, 2020a, emphasis added).

The ensuing work to develop a monitoring framework for the fundamental values of higher education in the EHEA – presented in this report – was initiated and completed specifically in order to address this request of the ministers.

- **Beginning immediately after the Rome Ministerial Conference**, the BFUG oversaw the establishment of a Working Group on Fundamental Values mandated with developing the remaining five shared conceptual references on the EHEA fundamental values, and a



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comprehensive framework for monitoring all six of them in preparation for the following ministerial conference, to be held in Tirana in May 2024 (EHEA,2024a).

- **Between 2021 and 2024**, as requested by the ministers, draft statements on all EHEA fundamental values have been finalized ahead of the Tirana Ministerial Conference (EHEA, 2024b). At the same time, also as requested by the ministers, a monitoring framework has been designed – under the supervision of the BFUG and the Working Group on the Fundamental Values of Higher Education – involving an extensive series of consultations with stakeholders from across the EHEA. In April-May 2024, the monitoring framework was piloted in four EHEA systems. Based on the lessons learned from the piloting phase, the framework will be finalized and submitted to the BFUG in July 2024.

The development of the framework during this period was supported by the New Building Blocks of the Bologna Process: Fundamental Values (NewFAV), funded by the European Union through the Erasmus+ Programme.

## 2. A Monitoring Framework for the Fundamental Values of Higher Education in the EHEA: Purpose, Design, Main Features and Indicators

### 2.1 The Purpose of the Monitoring Framework. How traditional challenges to monitoring values are addressed.

The statements on the fundamental values of higher education adopted or proposed to be adopted at the Rome and Tirana Ministerial Conferences offer a strong and clear shared understanding of what the fundamental values of higher education in the EHEA mean exactly. As such, they also represent the foundation for the design and implementation of the monitoring framework, along with the explicit EHEA commitments to protect and promote these values (Matei, Craciun and Potapova, 2024).

The design of the monitoring framework took a simple and flexible approach to addressing some of the traditional challenges with regard to the monitoring of values (see Matei, Craciun and Potapova, 2024). This framework builds on the extensive monitoring experience within the EHEA and also takes advantage of the fact that the EHEA fundamental values of higher education are clearly defined in a well-rounded, precise and comprehensive cluster, including clear references to the inter-relations between the values.

- First, the design of the monitoring framework closely follows the Bologna Process tradition of monitoring the implementation of **commitments** made by its members. As such, what is proposed to be monitored is not as much the values *per se* (values are notoriously elusive to capture), but the implementation of the commitments made about them, for which there is already valuable long-standing technical expertise in other policy areas in the EHEA.
- Second, the existence of a **cluster of fundamental values** is a unique feature of the monitoring framework and extremely helpful methodologically. In many other efforts to monitor values in higher education, difficulties arise because there is no consensus regarding their definition and the inter-relationships between them. For example, very often there is no agreement on whether academic freedom and university autonomy are distinct or not, whether one subsumes the other, or whether the right of students and staff to participate in higher education governance is part of academic freedom or not. Consequently, difficult and often sterile debates arise about how to measure these

values - together as one, separately each, discard some and keep only others, etc. For the EHEA, this problem is now straightforwardly avoided given that all these values are part of a common cluster, they are clearly defined in relation to each other and they will be all subject to monitoring, leaving none of them out. In line with the Rome Communiqué and the draft report of Eurydice (2024) on fundamental values, the EHEA fundamental values are to be “only understood as a whole and not a set of separate elements” as they are “deeply interconnected” (EHEA, 2020a). The proposed monitoring framework allows to assess the commitments to individual values but also untie the relationships between them.

As part of the Erasmus+ project New Building Blocks of the Bologna Process: Fundamental Values (NewFAV), a small team of researchers, comprising the three authors of this report, was tasked with developing a comprehensive proposal for the design of the monitoring framework and for the implementation of the monitoring tool. Under the direction of the Working Group on Fundamental Values, and with regular reporting to, and feedback from, the BFUG, the work to develop the monitoring framework also involved systematic and broad consultations with all stakeholder categories in the EHEA.

In what follows, the report details further the design process of the monitoring framework and presents its structure and main features as the tool proposed to be applied in practice for the purpose of assessing the degree to which the EHEA fundamental values of higher education are honoured and implemented in our systems, as requested by the ministers.

## 2.2 The Design Process

Between 2021 and 2024, the Working Group on Fundamental Values oversaw the design and development of the monitoring framework for fundamental values in the EHEA, with the assistance of the NewFAV project advisory committee, and involving extensive systematic stakeholder consultations. The working group on Fundamental Values comprised representatives from EHEA members, consultative members, and partners<sup>2</sup>. The NewFAV advisory committee comprised independent experienced practitioners and experts on fundamental values and their

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<sup>2</sup> The following members, consultative members, and partners signed-up for the Working Group on Fundamental Values (in alphabetical order): Austria, Council of Europe, Croatia, EI-EUTCE, ENQA, European Students' Union, European University Association, European Commission (EACEA), European Commission (Eurydice), Finland, France, Germany, Holy See, Iceland, Italy, Kazakhstan, Malta, The Netherlands, North Macedonia, Norway, Poland, Romania, Russia, Sweden, Switzerland, Turkey, United Kingdom (Scotland), United Kingdom. Not all have participated in equal measure. Russia was suspended from participation in the governance bodies and work programme of the EHEA, and hence also from the Fundamental Values WG, in April 2022, as a consequence of its war of aggression against Ukraine.

assessment. Stakeholder consultations included representatives from consultative members of the EHEA, universities and university research institutes, student and university associations, trade unions, and national and European specialized higher education agencies and organisations (such as for quality assurance).

The design process of the monitoring framework included the following stages:

### **Constructing a comprehensive inventory of existing monitoring tools for fundamental values and assessing their applicability to the EHEA monitoring**

This phase involved extensive desk research, literature review, interviews and consultations with experts and stakeholders, with the primary goal of identifying existing monitoring tools and mechanisms or other relevant efforts anywhere in the world that could be helpful in the EHEA context for the purpose of monitoring fundamental values. An extended report was published at the end of this phase (Matei et al 2023). It presented and discussed in detail this inventory and concluded that the existing tools, mechanisms and other efforts to monitor values in higher education can be very useful in several ways but cannot be readily used in the EHEA for the purpose of monitoring the fundamental values of higher education. The reason for this is that what is monitored (measured even, sometimes) by these tools and mechanisms is different from the fundamental values as defined by the EHEA. For example, the Academic Freedom Index is an extremely valuable tool, used globally. However, it defines academic freedom in a significantly different manner than the EHEA (Annex 1 to the Rome Communiqué). It therefore monitors something significantly different, and it cannot be used as such for the purpose of monitoring the implementation of the EHEA commitments with regard to the fundamental values.

Based on this extensive inventory and analysis of existing monitoring tools and mechanisms, the report at the end of this phase concluded that these can and must be used to provide initial and additional information and to cross-check the information that would be collected specifically through a dedicated EHEA monitoring mechanism, using an adapted tailor-made monitoring tool.

### **Designing a monitoring framework with a set of indicators that capture the EHEA commitments on fundamental values**

Taking the same broad consultative approach, in this phase a monitoring framework was developed (explained in the following section of the report), including a series of clear EHEA-adapted indicators. Extensive consultations were conducted with six dedicated task forces on each EHEA fundamental value (created specifically for this purpose as part of the New FAV project), with the project advisory committee and the Working Group of Fundamental Values. The

Working Group, in turn, reported to the BFUG periodically on the progress of this work. The results of this phase, including the actual proposal for a monitoring framework, were presented in a report submitted once again to the Working Group and the European Commission (Matei et al 2023).

### **Designing the monitoring tool**

In this phase, a step forward was made, detailing a proposal about how monitoring is proposed to be realized in practice, based on the monitoring framework developed in the previous phase. The tool was developed by operationalizing the fundamental values for the purpose of monitoring. That meant primarily extracting the main dimensions of each value (to specify what exactly will be monitored) as outlined in the Rome Statement on Academic Freedom and the draft statements/conceptual references prepared by the Working Group on Fundamental Values for the other five values. This proposal includes provisions about the exact data that will be collected, the data collection methodology, and how the data will be processed and presented in order to serve the purpose of assessing the degree to which the fundamental values are honoured and implemented in our systems and enable peer-learning between EHEA members. Overall, the proposed monitoring tool follows to a significant extent the methodology of the Bologna Process monitoring reports, although with adaptations and new elements, as required by the particular nature of the commitments regarding the fundamental values of higher education in the EHEA.

### **Piloting the monitoring framework and tool in four EHEA higher education systems**

In this phase, between April and May 2024, the tool was piloted in four EHEA systems to assess its feasibility and finalize the design. Four higher education systems have been selected in consultation with the Working Group on Fundamental Values and the BFUG. The case selection included small, medium size, and large countries, EU and non-EU countries, and national and sub-national systems. At the time of preparing the present report, the pilot was ongoing. Preliminary findings were discussed with stakeholders at a peer learning activity on 8 May 2024. To ensure the smooth completion of this phase and considering that this was only a tool calibration exercise, not an actual monitoring, the data collected from the four systems will not be made public. Based on the lessons for the pilot, a final proposal will be submitted to the Commission in July 2024, as per the NewFAV project requirements, and then submitted to the BFUG at its first meeting in the new work program.

## 2.3 Main Features and Indicators

Figure 1 (below) shows the core elements and indicators of the proposed monitoring framework, followed by a discussion.

As mentioned above in this report, there have already been other efforts to monitor, assess or measure some of these fundamental values in other contexts, although differently defined, or using different conceptual references for them, for instance institutional autonomy (Bennetot Pruvot and Estermann 2017; Bennetot Pruvot et al 2023) or academic freedom (Beiter et al 2016; Kinzelbach et al 2023; Maassen et al 2023; Craciun et al 2024a). Any such endeavour comes not only with considerable methodological challenges (Spannangel 2020; Kováts and Ronay 2023), but also epistemological and political challenges. Our simple and EHEA-adapted approach to addressing these challenges was discussed briefly above.

The distinguishing features of the monitoring framework presented in Figure 1 are as follows:

Figure 1. Monitoring Framework for Fundamental Academic Values

VALUES	Type of monitoring and Indicators	
Rights/Freedoms		
<ul style="list-style-type: none"><li>- Academic freedom</li><li>- Institutional autonomy</li><li>- Participation of students and staff in university governance</li></ul>	<i>De jure</i>	
	Protection	Outlook
	Promotion	
	<i>De facto</i>	
	Infringements	
	Threats	
	Positive developments	

VALUES	Type of monitoring and Indicators	
Duties/Obligations		
<ul style="list-style-type: none"><li>- Academic integrity</li><li>- Public responsibility <i>for</i> higher education</li><li>- Public responsibility <i>of</i> higher education</li></ul>	<i>De jure</i>	
	Protection	Outlook
	Promotion	
	<i>De facto</i>	
	Fulfilment	
	Threats	
	Positive developments	

### Commitments

As explained in first section of this chapter, the approach taken in the development of the motoring framework follows the Bologna Process tradition of monitoring commitments. In particular, three specific commitments with regard to the fundamental values have been identified in the EHEA documents, which are proposed to be translated into specific indicators, as explained below. The respective commitments concern the promotion and protection of the fundamental values as well as the development and implementation of a mechanism to assess their implementation.

These the commitments are most directly expressed in the Rome Communiqué (EHEA, 2020a), as follows:

*“The EHEA of our vision will fully respect the fundamental values of higher education and democracy and the rule of law. (...) We recognise that accomplishing this will require enacting policies and implementing measures in our national frameworks, some of which will go beyond our higher education systems and will entail alignment of wider national economic, financial and social strategies.”*

*“We reaffirm our commitment to **promoting** and **protecting** our **shared fundamental values** in the entire EHEA through intensified political dialogue and cooperation as the necessary basis for quality learning, teaching and research as well as for democratic societies” (emphasis added).*

*“We ask the BFUG to develop a framework for the enhancement of the fundamental values of the EHEA that will foster self-reflection, constructive dialogue and peer-learning across national authorities, higher education institutions and organisations, while also making it possible to assess the degree to which these are honoured and implemented in our systems”. (EHEA, 2020a)*

### Set of values

A remarkable and unique feature of the new EHEA framework of reference for the fundamental values of higher education is that it comprises a well-rounded and coherent set of six values, as explained in section above. This is extremely helpful for the definition and monitoring of these values. Other similar efforts, while praiseworthy in their thrust, usually focus exclusively on only one value, whether this is academic freedom, university autonomy, freedom of scientific research, or others.

The proposed motoring framework takes into account this interrelated cluster of values, each of them taken individually but also considering their interrelations.

## Categories of fundamental values

The six EHEA fundamental values of higher education are not identical with regard to their normative remit. Some of them refer to rights or freedoms, while the others are about obligations and duties. Both are important in higher education. This is a very important consideration conceptually, ethically, and even more so for the purpose of monitoring. It matters whether one is monitoring the exercise of rights or freedoms (looking to see if there are any undue limitations or infringements on the rights/freedoms and if enabling conditions are in place to support the exercise of those rights/freedoms<sup>3</sup>), or duties and obligations (looking at whether these duties are fulfilled in practice). Accordingly, the proposed monitoring frameworks contains partly different *de facto* indicators for values that are primarily rights or freedoms (infringements and threats), as opposed to those that are primarily duties and obligations (fulfilment of duties and obligations).

### *De jure/ de facto monitoring*

In line with the tradition of monitoring values, or fundamental values of higher education, the monitoring framework distinguishes between *de facto* and *de jure* indicators. *De jure* indicators are generated looking directly at the commitments made by the ministers: to protect the fundamental values (adopt and implement legislation in each system reflecting the fundamental values as jointly defined) and promote the fundamental values (through policies and other non-legislative means). In addition to these two *de jure* indicators (protection and promotion) a third one is proposed: outlook, as explained immediately below.

The current situation on the ground in the EHEA member countries will be monitored in a *de facto* section. Information on this section will be collected for each value from existing reports as well as, to a limited extent, new information collected from stakeholders regarding infringement and fulfilment of values, threats to freedoms and duties, and also – where available – positive developments. The purpose of this latter feature of the monitoring framework is to identify positive examples that can be used for peer learning and policy transfer between EHEA higher education systems.

### Protection, promotion and outlook

Protection as an indicator serves to monitor the commitment to adopt and implement supportive legislation in all EHEA systems reflecting the jointly adopted statements for the respective values. It is proposed to monitor the extent to which such legislation exists for each value and also the

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<sup>3</sup> In other words, considering both negative freedoms (absence of disabling conditions) and positive freedoms (presence of enabling conditions) (Kronfelder, 2021).

extent to which existing legislation is in line with the joint conceptual references for each. For this purpose, the traditional Bologna Process “traffic light” system will be used. Using this well-established feature of monitoring the implementation of Bologna commitments will also enable a comparative assessment of the protection of values across the EHEA.

It is important to acknowledge that the explicit list of EHEA fundamental values is relatively new, as it was adopted initially only in 2018. Also, the conceptual references for these values are, at least to some extent, also new. For example, it is for the first time at the Tirana Ministerial Conference that a shared conceptual reference will be adopted for the public responsibility *for* and *of* higher education. For these reasons, it cannot be reasonably expected that all systems have all the EHEA values already reflected in legislation and policy as jointly defined. Hence, a third indicator for the framework is proposed: outlook. This indicator will reflect existing plans to modify legislation and adopt new policies that intend to further support (or undermine) the fundamental values as jointly defined. The degree to which these plans have been put in practice will be assessed in the next monitoring cycle, checking back on the outlook in this way. This element of the framework, the outlook, is meant to further help with initiating peer-learning activities and policy dialogue between EHEA member and across relevant higher education stakeholders.

### Quantitative/qualitative elements

The framework includes both quantitative and qualitative elements. The *de jure* part of the framework will use quantitative elements based on the Bologna traffic light system, as well as qualitative narrative reporting discussing these findings. The *de facto* part of the framework will include exclusively narrative sections, discussing the findings regarding infringements of freedoms/rights, fulfilment of duties/obligations, and threats and positive developments regarding all fundamental values. In addition, the monitoring report will contain a system profile for all EHEA member states as well as a thematic comparative overview, where possible.

The EHEA monitoring of the fundamental values is not a stern exercise in measuring. The piloting phase of the monitoring framework, which is the last in this process of preparation, will enable the refinement and finalisation of the monitoring framework’s main elements and the methodology for data collection and analysis. In this way, the monitoring framework and the monitoring tool based on it will become fit for their intended purpose, which is to enhance the protection and promotion of fundamental values and “foster self-reflection, constructive dialogue and peer-learning across national authorities, higher education institutions and organisations, while also



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making it possible to assess the degree to which these are honoured and implemented in our systems” (EHEA, 2020a).

### 3 Next steps

The monitoring framework for the fundamental values of higher education has been endorsed by the BFUG and the Working Group on Fundamental Values. A proposal for a concrete monitoring tool has been developed and discussed with the Working Group and the BFUG as well, which is currently being piloted. This tool will be finalized after the current phase of piloting, after which a final proposal will be presented to the BFUG.

The proposal will include provisions about indicators, sources of data, data collection, processing and data visualisation, as explained in this report, as well as scenarios regarding who could undertake the task of monitoring fundamental values, which is a quite significant effort in scope and depth, and with what periodicity. Final decisions are to be taken by the BFUG, before beginning the actual monitoring.

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