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INTERNATIONALISATION OF HIGHER EDUCATION

STUDY

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INTERNATIONALISATION OF HIGHER EDUCATION

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INTERNATIONALISATION OF HIGHER EDUCATION

STUDY

Abstract

A study on the understanding of Internationalisation of Higher Education in the European context, based on two surveys, an analysis of the role of digital learning, ten national reports from Europe and seven from outside Europe. The study results in conclusions and recommendations on the future of Internationalisation of Higher Education in Europe, based on the national reports and a Delphi process among experts in international higher education.

CONTENTS

LIST OF ABBREVIATIONS

AASCU	American Association of State Colleges and Universities
ABET	Accreditation Board for Engineering and Technology
ACA	Academic Cooperation Association
ACBS	Agency for Student Loans and Scholarships
ACBSP	Accreditation Council for Business Schools and Programs
ACE	American Council on Education
AoF	Academy of Finland
AECID	Agencia Española de Cooperación Internacional para el Desarrollo
AEI	Australian Education International
AEI	Asia-Europe Institute (Malaysia)
AERES	Agence d'évaluation de la recherche et de l'enseignement supérieur
AGRI	Agriculture and Rural Development Committee
AvH	Alexander von Humboldt Foundation
AHEGS	Australian Higher Education Graduation Statement
AHELO	Assessment of Higher Education Learning Outcomes
AIMS	ASEAN International Mobility or Students
ALDE	Group of the Alliance of Liberals and Democrats for Europe
ANOSR	National Alliance of Student Organisations in Romania
ANPCDEFP	National Agency for Community Programmes for Education and Professional Development
ANSA	Association of Norwegian Students Abroad
ANVUR	Agenzia Nazionale di Valutazione del Sistema Universitario e della Ricerca (National Agency for the Evaluation of Universities and Research)
AO	Order of Australia
AOR	Aggregate offshore record
APAIE	Asia-Pacific Association for International Education

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APEC	Asia-Pacific Economic Cooperation
APUNE	Association of American Programs in Spain
ARACIS	Romanian Agency for Quality Assurance in Higher Education
ARC	Australian Research Council
ARWU	Academic Ranking of World Universities
ASCUN	Association of Colombian Universities
ASEAN	Association of Southeast Asian Nations
ASEM	Asia-Europe Meeting
ASEMME	Asia-Europe Meeting of Ministers of Education
AusTrade	Australian Trade Commission
AUCC	Association of Universities and Colleges of Canada
AUF	Agence universitaire de la francophonie
AUNP	ASEAN - EU University Network Programme
BAföG	Federal Training Assistance Act
BAS	Brake-assist systems
BBC	British Broadcasting Corporation
BC	British Council
BGF	Bourse du gouvernement français - French government mobility grants
BMBF	German Federal Ministry of Education and Research
BRIC	Brasil, Russia, India, China
BRICS	Brasil, Russia, India, China, South Africa
BUILA	British Universities International Liaison Association
BUWIWM	Biuro Uznawalno ci Wykształcenia i Wymiany Mi dzynarodowej (Bureau for Academic Recognition and International Exchange)
C-BERT	Cross-Border Education Research Team
CAN	Andean Community
CAP	Common Agricultural Policy
CBIE	Canadian Bureau for International Education
CCIE	Canadian Consortium for International Education

CCOO   Comisiones Obreras

CCYK   Colombia Challenge your Knowledge

CEEPUS   Central European Exchange Programme for University Studies

CEI   Campus de Excelencia Internacional

CEO   Chief Executive Officer

CeQuint   Certificate for Quality in Internationalisation

CERES   Regional Centres of Higher Education

CEVU   Collaborative European Virtual University

CFP   Common Fisheries Policy

CGE   Conférence des grandes écoles

CHE   Centre for Higher Education

CHE   Council on Higher Education (South Africa)

CHEI   Centre for Higher Education Internationalisation

CICan   Colleges and Institutes Canada (formerly Association of Canadian Community Colleges)

CICIC   Canadian Information Centre for International Credentials

CICUE   Committee for the Internationalisation and Cooperation of Spanish Universities

CIHE   Center for International Higher Education

CIMEA   Centro di Informazioni sulla Mobilità e le Equivalenze Accademiche (Information Centre on Academic Mobility and Equivalence)

CIMO   Centre for International Mobility

CIVET   Colombia, Indonesia, Vietnam, Egypt, Turkey

CLMV   Cambodia, Laos, Myanmar and Vietnam

CMO   Common market organisation

CMEC   Council of Ministers of Education, Canada

CNA   National Council for Accreditation

CNCP   Commission nationale de la certification professionnelle

CNE   Comité national d'évaluation

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CNOUS	Centre National des Oeuvres Universitaires et Scolaires
CNR	National Council of Rectors
CNRS	Centre National de la Recherche Scientifique
CNRED	National Centre for Equivalence and Recognition of Diplomas
COLCIENCIAS	Administrative Department of Science, Technology and Innovation
COLFUTURO	Foundation for the Future of Colombia
COMUE	Communauté d'universités et d'établissements
CONPES	Council of National Economic and Social Policy
COSCE	Confederación de Sociedades Científicas de España
CoR	Committee of the Regions
CRASP	Conference of Rectors of Academic Schools in Poland
CRES	Regional Conference on Higher Education
CRICOS	Commonwealth Register of Institutions and Courses for Overseas Students
CRUE	Conference of Spanish University Rectors
CRUI	Conferenza dei Rettori delle Università Italiane (Conference of Italian University Rectors)
CSFP	Commonwealth Scholarship and Fellowship Plan
CULT	Culture and Education Committee (European Parliament)
CYD	Fundación Conocimiento y Desarrollo
DAAD	Deutscher Akademischer Austauschdienst (German Academic Exchange Service)
DBH	Database for Statistics on Higher Education
DEET	Australian Department of Employment, Education and Training
DFAO	Dutch-Flemish Accreditation Organisation
DFAT	Australian Department of Foreign Affairs and Trade
DFATD	Department of Foreign Affairs, Trade and Development (Canada)
DFG	Deutsche Forschungsgeminschaft (German Research Foundation)
DFID	Department for International Development

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DIISR	Australian Department of Innovation, Industry, Science and Research
DLR	German Aerospace Center
DM	Decreto Ministeriale (Ministerial Decree)
DelPHE	Development Partnerships in Higher Education
E-JUST	Egypt-Japan University of Science and Technology
EAIE	European Association for International Education
EC	European Commission
ECA	European Consortium for Accreditation
ECOSOC	Economic and Social Committee
ECTS	European Credit Transfer System
EEA	European Economic Area
EHEA	European Higher Education Area
ELICOS	English Language Intensive Courses for Overseas Students
EMN	European Migration Network
ENIC	European Network of Information Centres in the European Region
ENQA	European Association for Quality Assurance in Higher Education
EP	European Parliament
EPF	European Platform
EPP-ED	Group of the European People's Party and European Democrats
EPU	Economic Planning Unit
ERA	Excellence in Research for Australia
ERA	European Research Area
ERA-Can+	European Research Area-Canada
ERASMUS	EuRopean Community Action Scheme for the Mobility of University Students
ERC	European Research Council
ESG	European Standards and Guidelines for Quality Assurance in Higher Education
ESN	Erasmus Student Network

ESOS Act	Education Services for Overseas Students Act
ESSEC	Ecole supérieure des sciences économiques et commerciales
ETP	Economic Transformation Programme
EU	European Union
EU2015	Estrategia Universidad 2015
EEA	European Economic Area
EUA	European University Association
FAO	Food and Agriculture Organization of the United Nations
FC	Fundación Carolina
FE	Further Education
FG	Finnish Government
FIRST	Finnish-Russian Student and Teacher Exchange Programme
FP	Framework Programme
FP7	Seventh Framework Programme for Research and Technological Development
FPS	Frontal protection systems
FRSE	Fundacja Rozwoju Systemu Edukacji (Foundation for the Development of the Education System)
FTE	Full-time equivalent
FUN	France Université Numérique
GDP	Gross domestic product
GII	Global Innovation Initiative
GM	Genetically modified
GNI	Gross national income
EFA	European Free Alliance
GUE/NGL	Confederal Group of the European United Left/Nordic Green Left
GUS	Główny Urz d Statystyczny (Central Statistical Office of Poland)
GWK	Joint Science Conference
HBMSU	Hamdan Bin Mohammed Smart University

HBO   Hoger Beroepsonderwijs (University of Applied Sciences)

HDR   Higher Degree by Research

HE   Higher Education

HEA   Higher Education Academy

HEFCE   Higher Education Funding Council for England

HEI   Higher Education Institution

HEI ICI   Higher Education Institutions International Cooperation Instrument

HEQCO   Higher Education Quality Council of Ontario

HESA   Higher Education Statistics Agency

HEURO   Association of UK HE European Officers

HIS   Higher Education Information System

IAU   International Association of Universities

IBC   International branch campus

I+D+i   Research, development and innovation

ICE   Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane (Italian Trade Promotion Agency)

ICETEX   Colombian Institute of Educational Credit and Technical Studies Abroad

ICoN   Italian Culture on the Net

ICT   Information and Communications Technology

IaH   Internationalisation at Home

IoHE   Internationalisation of Higher Education

IIE   Institute of International Education

IMHE   Institutional Management in Higher Education

IMPI   Indicators for Mapping and Profiling Internationalisation

INQAAHE   International Network for Quality Assurance Agencies in Higher Education

ISB   International Student Barometer

HRK   German Rectors' Conference

IAU   International Association of Universities

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IBSA	India, Brazil and South Africa
IC	International Classroom
ICP	Inter-University Cooperation Project
ICT	Information and Communication Technologies
IEAA	International Education Association of Australia
IEASA	International Education Association of South Africa
IEMU	Internationalisation, Equity and Institutional Management for a Quality Higher Education
IES	International Education Strategy (Canada)
IFI	International Fund for Ireland
INCHER	International Centre for Higher Education Research - Kassel
IND/DEM	Independence/Democracy Group
INRA	Institut National de la Recherche Agronomique
INSERM	Institut National de la Santé et de la Recherche Médicale
IP	Intensive Programme
IPRS	International Postgraduate Research Scholarship
IU	UK Higher Education International Unit
JASSO	Japan Student Services Organization
JICA	Japan International Cooperation Agency
JSPS	Japan Society for the Promotion of Science
KMK	Standing Conference of Ministers of Education and Cultural Affairs
KNAW	Koninklijke Nederlandse Akademie van Wetenschappen (Royal Netherlands Academy of Arts and Sciences)
LACHEC	Latin American and Caribbean Higher Education Conference
LEN	Law of National Education (Law no.1/2011)
LFHE	Leadership Foundation for Higher Education
LIA	Laboratoire International Associé
LMD	Licence-Master-Doctorat (It refers to the implementation of the three-cycle structure in France)

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MAECI	Ministero degli Affari Esteri e della Cooperazione Internazionale (Ministry of Foreign Affairs and International Cooperation)
MAPES	Academic Mission for the Promotion of Higher Education (in Latin America and the Caribbean)
MBA	Master of Business Administration
MECD	Spanish Ministry of Education, Culture and Sport
MHO	Programma Medefinanciering Hoger Onderwijs (Joint Financing Programme for Cooperation in Higher Education)
MENESR	Ministére de l'Éducation Nationale, de l'Enseignement Supérieur et de la Recherche
MEXT	Ministry of Education, Culture, Sports, Science and Technology, Japan
MINT	Mapping Internationalisation
MIUR	Ministero dell'Istruzione, dell'Università e della Ricerca (Ministry of Education, Universities and Research)
MJIIT	Malaysia-Japan International Institute of Technology
MNiSW	Ministerstwo Nauki i Szkolnictwa Wy szego (Ministry of Science and Higher Education)
MOE	Ministry of Education, Malaysia
MOFA	Ministry of Foreign Affairs, Japan
MOOC	Massive Online Open Course
MQA	Malaysian Qualifications Agency
MYEULINK	Malaysia-EU link
Neth-ER	Netherlands house for Education and Research
NAFSA	National Association of Foreign Student Advisers
NARIC	National Academic Recognition Information Centres in the European Union
NCGP	National Competitive Grants Program
NCHE	National Commission on Higher Education
NCP	New Colombo Plan
NDEA	National Defense Education Act

NEET	Not in Education, Employment or Training
NESO	Netherlands Education Support Office
NH&MRC	National Health and Medical Research Council
NHERI	National Higher Education Research Institute, Malaysia
NHESP	National Higher Education Strategic Plan
NICHE	Netherlands Initiative for Capacity Development in Higher Education
NIS	National Institute of Statistics
NKEAs	National Key Economic Areas
NL	Netherlands
NOKUT	Norwegian Agency for Quality Assurance in Education
NORAD	Norwegian Agency for Development Cooperation
NPT	Netherlands Programme for the institutional strengthening of post-secondary education and training capacity
NQF	National Qualifications Framework
NSB	National Science Board
NUFFIC	Netherlands Universities Foundation for International Cooperation
NUS	National Union of Students
NVAO	Nederlands-Vlaamse Accreditatieorganisatie (Dutch-Flemish Accreditation Organisation)
NWO	Nederlandse Organisatie voor Wetenschappelijk Onderzoek (Netherlands Organisation for Scientific Research)
OAPEE	Organismo Autónomo Programas Educativos Europeos
OBHE	Observatory on Borderless Higher Education
ODA	Official development assistance
OECD	Organisation for Economic Co-operation and Development
OEI	Organisation of Ibero-American States
OER	Open educational resource
OS HELP	Overseas Study Higher Education Loan Programme
PCI	Inter-University Cooperation Programme

Pell   Pell Institute

PIMA   Programme for Exchange and Academic Mobility

PISA   Programme for International Student Assessment

PKA   Polska Komisja Akredytacyjna (Polish Accreditation Committee)

PMIs   Prime Minister's Initiatives

POSDRU   Sectoral Operational Programme - Human Resources Development (SOP HRD)

PRES   Pôle de Recherche et d'Enseignement Supérieur

PROEXPORT   Organisation responsible for promoting international tourism, foreign investment and non-traditional exports in Colombia

PSRBs   Professional, Statutory and Regulatory Bodies

QAA   Quality Assurance Agency

QACHE   Quality Assurance of Cross-Border Higher Education

QRF   ASEAN Qualifications Reference Framework

R&D   Research and Development

RCI   Colombian Network for Internationalisation

RIACES   Ibero-American Network for Quality Assurance in Higher Education

RIU   Research Intensive University

RTD   Research and Technological Development framework programme

SADC   Southern African Development Community

SCQF   Scottish Credit and Qualifications Framework

SEE   South East Europe

SF   Statistics Finland

SENA   National Learning Service

SEPIE   Spanish Service for the Internationalisation of Education

SER   Sociaal-Economische Raad (Social and Economic Council of the Netherlands)

SIEM   Services for International Education Marketing

SIO   Senior International Officer

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SIU	Norwegian Centre for International Cooperation in Education
SLC	Student Loans Company
SNIES	National System of Higher Education Information
STIR	Stimulering Internationalisering (Stimulation of Internationalisation)
StraNES	Stratégie Nationale de l'Enseignement Supérieur
SUNY	State University of New York
SV	Samenwerkingsverbanden (Cooperation Alliances)
TEQSA	Tertiary Education Quality and Standards Agency
TGUP	Top Global University Project
THE	Times Higher Education
TICAS	The Institute for College Access and Success
TNE	Transnational Education
TQS	Transnational Quality Strategy
UAE	United Arab Emirates
UAS	University of Applied Sciences
UCAS	Universities and Colleges Admissions Service
UCSC	Università Cattolica del Sacro Cuore
UCTS	UMAP Credit Transfer Scheme
UEFISCDI	Executive Unit for Financing Higher Education, Research, Development and Innovation
UFAR	Université Française en Arménie, Erevan
UK	United Kingdom
UKCISA	UK Council for International Student Affairs
UKRO	UK Research Office
UKTI	UK Trade and Investment
UMAP	University Mobility in Asia and the Pacific
UMI	Unité Mixte Internationale
UMR	Unité Mixte de Recherche
UNESCO	United Nations Educational, Scientific and Cultural Organization

UNIK   University Graduate Center, Kjeller

UNIS   University Centre in Svalbard, Spitsbergen

UNISA   University of South Africa

UNS   Unified National System

UOC   Universitat Oberta de Catalunya

USA   United States of America

USCB   US Census Bureau

USDE   US Department of Education

UUK   Universities UK

VET   Vocational Education and Training

VH   Vereniging van Hogescholen (Association of Universities of Applied Sciences)

VirtUE Virtual University for Europe

VLE   Virtual Learning Environment

VSB   Verenigde Spaar Banken (group of small savings banks)

VSNU   Vereniging van Samenwerkende Nederlandse Universiteiten (Association of Dutch RIUs)

WHEB   Welsh Higher Education Brussels

WHW   Wet op het Hoger Onderwijs en Wetenschappelijk Onderzoek (Higher Education and Research Act)

WIEOR   Joint venture of Essilor International Research Centre and the Medical University of Wenzhou

WO   Wetenschappelijk Onderwijs = HE at RIUs

WPI   World Premier International Research Center Initiative

WWII   World War II

YAP   TOBITATE! Young Ambassador Program

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EXECUTIVE SUMMARY

Internationalisation of higher education in Europe

'Internationalisation of Higher Education' provides an overview of the main global and European trends and related strategies at European, national and institutional level, as well as the underlying gist of what internationalisation is and should be aiming for. The overall objective of this study was to scrutinise internationalisation strategies in higher education, with a particular focus on Europe.

Internationalisation of higher education (IoHE) is a relatively new phenomenon but, as a concept, it is one that is both broad and varied. Over the last 30 years, the European programmes for research and education, in particular the ERASMUS programme but also research programmes like the Marie Curie Fellowships, have been the motor for a broader and more strategic approach to internationalisation in higher education in Europe and have been an example for institutions, nations and regions in other parts of the world. The internationalisation of higher education has been influenced by the globalisation of our economies and societies and the increased importance of knowledge. It is driven by a dynamic and constantly evolving combination of political, economic, socio-cultural and academic rationales. These motives take different forms and dimensions in the different regions and countries, and in institutions and their programmes. There is no one model that fits all. Regional and national differences are varied and constantly evolving, and the same is true within the institutions themselves.

A study of the internationalisation of higher education must take into account a broad range of diverse factors. It has to identify and analyse the global, regional, national and institutional commonalities and differences in the development of internationalisation if it is to understand, influence and support the process of internationalisation in higher education. However, common goals and objectives can also be observed, such as the increased importance of reputation (often symbolised by rankings), visibility and competitiveness; the competition for talented students and scholars; short-term and/or long-term economic gains; demographic considerations; and the focus on employability and social engagement. In 17 country reports – ten from Europe and seven from other continents (developed, emerging and developing countries) – this diversity is illustrated in both national and institutional policies.

Ten key developments for Europe and the rest of the world are identified in the study:
1. Growing importance of internationalisation at all levels (broader range of activities, more strategic approaches, emerging national strategies and ambitions);
2. Increase in institutional strategies for internationalisation (but also risks of homogenisation, focus on quantitative results only);
3. Challenge of funding everywhere;
4. Trend towards increased privatisation in IoHE through revenue generation;
5. Competitive pressures of globalisation, with increasing convergence of aspirations, if not yet actions;
6. Evident shift from (only) cooperation to (more) competition;
7. Emerging regionalisation, with Europe often seen as an example;
8. Numbers rising everywhere, with challenge of quantity versus quality;
9. Lack of sufficient data for comparative analysis and decision-making;
10. Emerging areas of focus are internationalisation of the curriculum, transnational education and digital learning.

In Europe, it is apparent that the internationalisation as a strategic process began with ERASMUS. The programme created common understandings and drivers for internationalisation in most countries, and this was further reinforced by the Bologna Process. Internationalisation is now becoming mainstreamed at the national and institutional level in most countries of the world, and in particular in Europe. The rhetoric speaks of more comprehensive and strategic policies for internationalisation, but in reality there is still a long way to go in most cases. Even in Europe, seen around the world as a best-practice case for internationalisation, there is still much to be done, and there is an uneven degree of accomplishment across the different countries, with significant challenges in Southern and, in particular, Central and Eastern Europe.

Two surveys on internationalisation in Europe and the world, one by the International Association of Universities (IAU) and the other by the European Association for International Education, demonstrate that leaders in higher education and practitioners in international education:

- Perceive the key benefits and reasons for pursuing internationalisation as the improvement of the quality of teaching and learning and preparing students to live and work in a globalised world
- View regional/national-level policy as a key external driver and influencer of institutional policy on internationalisation
- Note that increasing international (and especially outbound) student mobility is a key policy focus in institutional internationalisation policies
- Report that, as well as international student mobility, international research collaboration and international strategic partnerships are given priority among the internationalisation activities undertaken by European institutions.

The combined results of the two studies draw a highly encouraging picture of internationalisation in Europe. Moreover, the IAU survey showed that Europe is the region most often prioritised in institutional internationalisation activities in other parts of the world.

A Delphi Panel exercise among key experts in international higher education around the world confirmed this picture and resulted in a scenario for the future of internationalisation of higher education in Europe. This scenario sees IoHE as a continually evolving response to globalisation driven by a dynamic range of rationales and a growing number of stakeholders. While it expects mobility and cross-border delivery to continue to grow, it calls for a stronger focus on the curriculum and learning outcomes to ensure internationalisation for all, and not just for the mobile few. It identifies partnerships and alliances in varying forms as becoming increasingly important for both education and research and recognises the key role of the European Commission in supporting IoHE development.

Inevitably, there are barriers to be overcome, linked mainly to funding and regulatory constraints but also to institutional issues of language proficiency and the nature of academic engagement and reward. Equally, there are enablers such as technology, stronger (and more equal) collaboration, a greater focus on qualitative outcomes, the fostering of public-private initiatives and greater alignment between education and research as well as between different levels of education.

The scenario envisages that, if the barriers are removed and the enablers activated, a European higher education will emerge whose graduates will be able to contribute

meaningfully as global citizens and global professionals in a Europe that is better placed not only to compete but also to cooperate.

As an outcome of this Delphi Panel exercise, this study has revised Jane Knight's commonly accepted working definition for internationalisation as 'the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society'.

This definition reflects the increased awareness that internationalisation has to become more inclusive and less elitist by not focusing predominantly on mobility but more on the curriculum and learning outcomes. The 'abroad' component (mobility) needs to become an integral part of the internationalised curriculum to ensure internationalisation for all, not only the mobile minority. It re-emphasises that internationalisation is not a goal in itself, but a means to enhance quality, and that it should not focus solely on economic rationales.

Most national strategies, including in Europe, are still predominantly focused on mobility, short-term and/or long-term economic gains, recruitment and/or training of talented students and scholars, and international reputation and visibility. This implies that far greater efforts are still needed to incorporate these approaches into more comprehensive strategies, in which internationalisation of the curriculum and learning outcomes, as a means to enhance the quality of education and research, receive more attention. The inclusion of 'internationalisation at home' as a third pillar in the internationalisation strategy of the European Commission, European Higher Education in the World, as well as in several national strategies, is a good starting point, but it will require more concrete actions at the European, national and, in particular, the institutional level for it to become reality.

Some additional conclusions in relation to that scenario can be made:

- There is increased competition from emerging economies and developing countries, but also opportunities for more collaboration as they become stronger actors in the field of higher education

- There is a shift from recruitment of international students for short-term economic gain to recruitment of talented international students and scholars, in particular in the STEM fields, to meet the needs of academia and industry, which are caused by demographic trends, insufficient local student participation in these fields, and increased demand for innovation in the knowledge economy

- Funding of higher education, tuition fees and scholarship schemes are diverse and result in different strategies, but also generate a range of obstacles for mobility and cooperation. Greater transparency and the removal of these and other obstacles are needed to increase opportunities for mobility and cooperation

- Joint degrees are recognised as important for the future of internationalisation of higher education in Europe and beyond, though many barriers still need to be overcome and it must be acknowledged that such degrees have to be built on mutual trust and cooperation, which require time to develop in order to guarantee sustainability

- There is increased recognition of the need for more higher education and industry collaboration in the context of mobility of students and staff, building on the increased attention to work placements in Erasmus+

- Greater recognition is being given to the important role of academic and administrative staff in the further development of IoHE. Academics, whose contribution over the past 25 years has been reduced in the increased centralisation of European programme administration, are now understood to play a crucial role in the internationalisation of education and research and need to be given additional support

- Notwithstanding the accomplishment made in the Bologna Process for further transparency, there are still substantial differences in higher education systems, procedures and funding in Europe between countries, which influence the way internationalisation evolves in these countries and how cooperation can be increased

- There are also still substantial imbalances in credit and degree mobility, as well as staff mobility, between different countries in Europe. This is particularly the case for Central and Eastern Europe, where there is both mobility imbalance and declining higher education enrolments. This requires attention from the national governments in these countries but also at the European level, as it could lead to an increased divide in higher education in the region

- Europe is still playing catch-up in the digital revolution, but it is well-placed to be in the vanguard of new thinking on how the digital revolution can improve both quality and access to higher education. It is thus necessary to give increased attention to digital and blended learning as instruments to complement the internationalisation of higher education, not only through MOOCs but also through virtual exchange and collaborative online international learning.

Set out below are recommendations on the internationalisation of higher education for all policy levels:

1. Address the challenges of credit and degree mobility imbalances and institutional cooperation, stemming from substantial differences in higher education systems, procedures and funding.

2. Recognise the growing popularity of work placements and build options to combine them with language and cultural skills training and study abroad.

3. Support the important role of academic and administrative staff in the further development of IoHE.

4. Foster greater higher education and industry collaboration in the context of mobility of students and staff.

5. Pay more attention to the importance of 'Internationalisation at home', integrating international and intercultural learning outcomes into the curriculum for all students.

6. Remove the barriers that impede the development of joint degrees.

7. Develop innovative models of digital and blended learning as an instrument to complement IoHE.

8. Align IoHE with internationalisation at other levels of education (primary, secondary, vocational and adult education).

9. Stimulate bilingual and multilingual learning at the primary and secondary education level as a basis for a language policy based on diversity.

10. Remove barriers between internationalisation of research and education, at all levels, for greater synergy and opportunity.

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Higher education as a public good, and in the public interest, is not necessarily in conflict with increased entrepreneurship and private ownership, but it is important to ensure that the internationalisation process acts in line with the values and principles as described in the IAU declaration Affirming Academic Values in Internationalisation of Higher Education, A Call for Action (IAU) and the International Student Mobility Charter (EAIE).

The importance of the role of the European Union and the Bologna Process in the development of IoHE, in Europe but also around the globe, is undeniable, and has to be built on even further. In this process, however, it is essential to focus on partnerships and collaboration that recognise and respect the differences in contexts, needs, goals, partner interests and prevailing economic and cultural conditions. Europe can only be an example if it is willing to acknowledge that it can also learn from elsewhere; it offers an important model but not the only one for the modernisation of higher education.

Summing up, we can say that the future of IoHE in Europe looks potentially bright, but its further positive development and impact will only take place if the various stakeholders and participants maintain an open dialogue about rationales, benefits, means, opportunities and obstacles in this ongoing process of change. We cannot ignore the fact that IoHE is also being challenged by increasingly profound social, economic and cultural issues, such as the financial crisis, unfavourable demographic trends, immigration and ethnic and religious tensions. While these challenges represent a threat, they also raise our awareness of the importance of IoHE in developing a meaningful response.

INTRODUCTION

Hans de Wit, Eva Egron-Polak, Laura Howard, Fiona Hunter

This study, entitled Internationalisation of Higher Education, was commissioned by the European Parliament (EP) and carried out by the Centre for Higher Education Internationalisation (CHEI) at the Università Cattolica del Sacro Cuore (UCSC) in Milan, in cooperation with the International Association of Universities (IAU) and the European Association for International Education (EAIE), under contract no IP/B/CULT/IC/2014-002.

The tender document states that 'the overall objective of this study is to scrutinise internationalisation (strategies) in higher education, with a particular focus on Europe' (Terms of Reference, 2013, p. 2). It continues, 'Based on the assumption that the variety of approaches to internationalisation currently discernible – going hand in hand with the manifold objectives being pursued – is not least due to different perceptions of the concept, the study is expected to provide not only an overview of the main strategies pursued at different levels (global, European, national, institutional), but also the underlying gist of what internationalisation is and should be aiming for. A critical assessment of the different ways in which the challenges of the internationalisation imperative are addressed today on a global scale should be followed by a more detailed examination of the situation in the European Union' (Terms of Reference, 2013, p. 2).

In our view, an awareness of the 'underlying gist of what internationalisation is and should be aiming for' is an essential requirement for understanding the broad and complex concept of the 'what' that internationalisation in higher education has become over the years. It is with that understanding that the 'how' of internationalisation should be explored, in the sense of how regions, nations, and institutions respond to a changing environment and reposition themselves accordingly.

The research questions that the study aims to provide answers to, as defined by the tender, are:

1) How can 'internationalisation' be understood in the context of higher education, and what strategies are being pursued globally in this regard?

In order to respond to this question, we look at the conceptual development of internationalisation – the 'what' and 'how' but also the 'why' and 'for whom' – in a comparative and historical way. For example, what are the main conceptual models in relation to rationales, approaches, and strategies, as defined in the literature? What are the key trends in the conceptual evolution of internationalisation over the past 25 years? What different accents can be found in the development of internationalisation of higher education in Europe, in comparison to other regions in the world, such as North America and Australia, but also the emerging regions of Africa, Asia and Latin America? In this analysis we look at both strategies and approaches, at regional, national and institutional levels. The 17 country studies provide valuable input for this comparative analysis, as do the results of two surveys conducted by the consortium members IAU and EAIE.

2) How far and by which means is the European Union and its Member States responding to the challenges of internationalisation?

The European programmes and strategies to internationalise higher education are considered to be important stimulators and facilitators for the internationalisation of higher education in Europe and elsewhere in the world. Current examples of this are Erasmus+ on the programme side, and the European Commission's 'European Higher Education in the World' communiqué on the policy side. They are influenced by a long list of previous programmes and documents, as well as studies and reports that have examined the development of internationalisation strategies in Europe. These include studies on the impact of the Erasmus programmes, cross-border delivery, mobility patterns and windows, joint and double degrees, employability, the Tuning projects, etc. In addition, Member States have developed their own strategies and policies for internationalisation, building on and looking beyond the policy of the European Commission. A critical examination of these studies, reports and documents, as well as of the country reports that are part of this study, along with the results of the IAU 4th Global Survey entitled Internationalisation of Higher Education: Growing expectations, fundamental values, and the results of the EAIE Barometer: Internationalisation in Europe (a survey conducted among practitioners in the field of higher education), will provide the content for the analysis of the way the European Union and its Member States are responding to the challenges of internationalisation.

3) What are the perspectives of future development, and which recommendations can be made both for policy makers and higher education institutions?

The two analyses mentioned above, as well as the survey results and the country reports, provide the foundation for answering the question regarding the perspectives of future development and the context for recommendations for policy makers and higher education institutions. In addition, the study includes the results of a Delphi Panel. The categories of questions for the Delphi Panel focused on obtaining clear perspectives and recommendations on rationales, strategies and challenges for internationalisation in the coming 10 years, and looked specifically at mobility (credit and degree, students and faculty, projects and programmes, etc.), curricula and learning outcomes, digital learning and partnerships. The Panel results, based on three rounds of interactions among key experts in international higher education throughout the world, provide a challenging scenario for the future of the internationalisation of higher education in Europe.

In addition, a number of more specific issues are examined in the study, in line with the terms of the tender document (Terms of Reference, 2013, p. 3):

1) To which extent can digital learning and virtual mobility replace traditional forms of student and staff mobility?

Digital learning and virtual mobility (also called 'collaborative online international learning' in the US) are seen as key innovative dimensions of the internationalisation of higher education. This aspect is addressed in a special report prepared for this study. Whereas in current media coverage the focus is primarily on MOOCs, the study gives a broader perspective on the role of digital learning in internationalisation and provides examples of innovative ways in which it can enhance the contribution of internationalisation to the quality of teaching and learning, and replace or strengthen the traditional mobility of students and staff.

2) Are there potential conflict areas between internationalisation on the one hand, and other priorities of higher education policies (quality of teaching and research, funding, curricular reform, etc.) on the other?

Two of the main challenges for internationalisation are that it is perceived and implemented as mainly a 'luxury' addition to teaching and learning, and that it is an implicitly natural dimension of research. The consequence of such assumptions about internationalisation is that the funding, support and organisation required to internationalise is a key challenge, as has been confirmed over the years by the IAU Global Surveys, for instance. This applies both to teaching and learning, and to research. Faculty engagement, the integration of internationalisation into the curriculum, and the mainstreaming of internationalisation are seen as the main ways to overcome that challenge. The study looks into this challenge and makes recommendations for enhancing faculty engagement, integration into the curriculum, and mainstreaming. The scenario resulting from the Delphi Panel pays special attention to these potential conflicts, both in raising awareness and identifying pathways for development in line with academic values, principles and traditions.

3) How far do current internationalisation strategies potentially compromise academic values and principles?

In the current debate on the internationalisation of higher education, the potential unintended consequences (Knight, 2008) and misconceptions (de Wit, 2011) of internationalisation are central issues. The values and principles of global higher education are also central in IAU's (2012b) Affirming Academic Values in Internationalisation of Higher Education: A Call for Action. This important issue is addressed in the overall analysis, and in the country reports and in the scenario emerging from the Delphi Panel exercise.

4) Should national governments and/or the European Union play a more active role in the development, supervision and coordination of national/European internationalisation policies?

The relationship between programmes, institutions, national and regional policies and strategies is the subject of many governance and strategy discussions regarding the internationalisation of higher education. There is no universally applicable model in terms of how to approach and implement internationalisation. Rationales, policies and governance structures change over time, and the interaction between the different levels and stakeholders in higher education and its internationalisation – including employers, given the increased emphasis on employability in relation to internationalisation – is an essential component of the development of internationalisation.

Over the past decade, the emphasis in Europe has moved from the national level, to the institutional level on the one hand and the European Union on the other. Recently, one can observe a revival of national policies – in Europe, for instance, internationalisation policies have been introduced in Germany, the Netherlands, Norway, Poland, the UK and Romania (in preparation). A similar trend has been seen outside of Europe as well, for example in Australia, Canada and South Africa (in preparation). In the study, attention is given to the relationship between the various parties involved in the development, supervision and coordination of internationalisation, with specific attention paid to the role of national governments and the European Union.

The study, in addressing the above research questions, builds on existing research and publications, but also brings in additional new perspectives and geographically diverse input on intentions, approaches and outcomes.

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Approach and methodology of the study

The following approach was used for the study:

1. Carry out a critical analysis of the main literature on internationalisation in higher education, globally and in Europe, as well as the higher education management literature with a focus on strategic change and internationalisation.

2. Carry out a critical analysis of the main documents, reports and studies on internationalisation in higher education with specific emphasis on Europe.

3. Carry out a critical analysis of the trends and issues from recent surveys on internationalisation in higher education, in particular the IAU 4th Global Survey on Internationalisation of Higher Education (Egron-Polak and Hudson, 2014), as well as The EAIE Barometer: Internationalisation in Europe, both completed in 2014.

4. Build on the essays and articles written by leading experts in international higher education: on the future of internationalisation for EAIE in the book Possible Futures (de Wit, Hunter, Johnson and Liempd, 2013), to which both the research team and most subcontractors contributed; on the development of the internationalisation of higher education in Europe and in other parts of the world; on mobility; on curriculum; and on innovation and future trends.

5. Build on the SAGE Handbook of International Higher Education (Deardorff, de Wit, Heyl and Adams, 2012), the first comprehensive handbook on the internationalisation of higher education, in which several of the subcontractors and the lead team were involved as contributors and, in one case, as co-editor.

6. Make use of the broad database of expertise of the three consortium members to provide input on the recommendations, based on the research, the country reports, the digital learning study, and the results of the Delphi Panel exercise, as explained below.

7. Extend the recommended number of countries in Europe from at least six to 10 countries from Europe (including one non-EU country), reflecting the regional diversity in the region, and extend the recommended number of countries from outside Europe from at least three to seven non-European countries, also to reflect diversity at the global level.

8. Include specific analysis of digital learning/virtual mobility to provide, in addition to the input from the country studies, a more profound analysis of the innovation potential it has for internationalisation, and to build upon the report in the Delphi Panel exercise.

9. Include results of a Delphi Panel exercise, a method to tease out expertise focused on perspectives and recommendations on the internationalisation of higher education for the European Union and its Member States.

Geographical areas covered

As mentioned above, we extended the number of European countries from six to 10 (including one non-EU country, Norway) to reflect the diversity of higher education and its internationalisation within Europe, and the number of non-European countries from three to seven, to reflect the diversity across different continents.

Within Europe

We include country reports from the following 10 European countries:

Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Romania, Spain and the UK.

The rationale behind this selection is as follows:

The big three – France, Germany and the UK – are, in quantitative terms, dominant in the internationalisation of higher education in the European context, in particular in relation to the number of international students they host and the cross-border delivery of education. In other areas – such as exchange and study abroad, as well as curriculum development – although in absolute numbers they are also substantive, they are proportionally less dominant. And, if we look at the rationales, objectives, national policies and geographical focus, each one of them offers a quite different model.

If we look beyond those big three, we can identify substantive differences between Northern Europe, the smaller Western European countries, Central and Eastern Europe and Southern Europe, in terms of higher education system structures and cultures, as well as in relation to internationalisation approaches. If we were not to take this diversity into account, the overall analysis of internationalisation in Europe would have substantial biases. It is for that reason that we have extended the country analyses to two Scandinavian countries instead of one (Norway, a non-EU country, to complement Finland), one smaller Western European country (the Netherlands), two countries from Southern Europe (Spain and Italy), and two countries from Central and Eastern Europe (Poland and Romania).

Outside Europe

We include the following seven non-European countries:

Australia, Canada, Colombia, Japan, Malaysia, South Africa and the USA.

In this way, we include countries from all continents. The rationale behind this selection is that Australia, Canada and the United States are important actors in the field of international education, but focusing only on these three countries would not cover the diversity of national players and their different positions in the global higher education field. It is for that reason that we have added Colombia for Latin America, Japan and Malaysia for Asia, and South Africa for Africa.

We are aware of the fact that the BRIC countries (Brazil, Russia, India and China) are not included in this selection. We will pay specific attention to this important group of big, emerging economies in our concluding chapter.

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Format of the country reports

We have developed the following format for the country reports:

1. Short introduction highlighting key aspects of the report.

2. Short description of the higher education system and main characteristics: number and types of institutions (e.g. universities and universities of applied science), number of students, public/private, other specific aspects.

3. Quantitative overview of the key performance indicators of internationalisation: number and percentage of international students and their origins; number and percentage of international staff and their origins; number and percentage of students studying abroad and their destinations; participation in European programmes or other supranational programmes, where relevant (in education, research and capacity building); language(s) of instruction; partnerships; transnational operations domestically and internationally (e.g. franchises, branch campuses, twinning programmes); capacity building in developing countries.

4. Overview and analysis of national policies for the internationalisation of higher education (where relevant), evolution over time, key priorities, trends and issues, including: mobility (credit and degree, inbound and outbound, students and staff); internationalisation at home (curriculum, teaching and learning, learning outcomes, joint and double degrees); digital learning/virtual mobility; research (including PhD); funding (e.g. tuition fees, scholarships); services (visa, housing, credit transfer).

5. Overview of the role of European or other supranational programmes and policies on the internationalisation of higher education and their relationship to national and institutional policies and strategies (where relevant).

6. Overview of institutional policies based on available information: trends, issues and challenges, as well as their relation to national and European (or other supranational) policies.

7. Other key stakeholders and funding schemes for internationalisation (local governments, companies, foundations, etc.).

8. Key authorities, strategies and objectives, priorities, successes and obstacles for internationalisation, in relation to global developments and the European policy for internationalisation (or other supranational policies), with specific focus on the role of digital learning, potential conflict areas for internationalisation, academic values and principles, and the role of national governments and the European Union in overcoming them.

These components are touched upon in each of the country reports. However, in light of the unique realities inherent in each national context, all of the country reports accentuate different aspects and priorities in their descriptions and analysis.

Organisation, management and coordination of the project

The lead team in the consortium for the study was the Centre for Higher Education Internationalisation (CHEI), which was responsible for all activities associated with the organisation, management and coordination of the work, and was also the sole contact point for cooperation with the European Parliament's services. The Academic Director for the project was Hans de Wit, Director of the Centre for Higher Education Internationalisation (CHEI) at Università Cattolica del Sacro Cuore in Milan, Italy, and Professor of Internationalisation of Higher Education at the Amsterdam University of Applied Sciences, and the Project Manager was Fiona Hunter, Research Associate at CHEI. The consortium team was additionally composed of Eva Egron-Polak, Secretary General of IAU, and Laura Howard, President of EAIE. Robert Coelen, Professor of Internationalisation at Stenden University of Applied Sciences assisted the consortium team in the Delphi Panel process. Ross Hudson from IAU and Anna-Malin Sandstrom of EAIE contributed, together with Eva Egron-Polak and Laura Howard, to Chapter 2 of the study (which focuses on the two surveys conducted by IAU and EAIE). William Lawton, former Director of the Observatory on Borderless Higher Education (OBHE), wrote Chapter 3 (on digital learning).

The country reports were written by experts from the specific countries, in some cases a single expert but in seven cases by two experts, bringing in a broad range of expertise. The authors of the country reports have ample experience in the policy and practice of internationalisation at the institutional and national level and are also actively involved in research and/or international education associations in their country and/or region. This combined perspective provides the commitment and experience relevant for the purpose of this study.

The consortium created internal quality control mechanisms, with the aim of assuring the highest academic, editorial and linguistic standards. These were set up in the form of two review teams, which intervened at regular intervals throughout the process. One peer review team, composed of three experts – Philip Altbach, director of the Center for International Higher Education (CIHE) at Boston College in the USA, Elspeth Jones, professor emerita of Leeds Metropolitan University in the UK, and Betty Leask, pro vice-chancellor (teaching and learning) of La Trobe University in Australia – was responsible for guaranteeing that the highest academic standards were met, and the other team, composed of two native speakers of English – Laura Howard, University of Cádiz and President of EAIE, and Laura Rumbley, associate director of CIHE at Boston College – were responsible for editorial quality and linguistic accuracy.

Content of the study

This study consists of 21 chapters.

The first part addresses the concept and context of internationalisation and consists of three chapters: Understanding Internationalisation of Higher Education in the European Context; Quantifying Internationalisation – Empirical Evidence of Internationalisation of Higher Education in Europe: The results of the IAU 4th Global Survey on Internationalisation and the EAIE Barometer; and Digital Learning, Mobility and Internationalisation in European Higher Education.

The second part contains the 17 country reports. The first section includes the 10 European countries in alphabetical order, and the second section the non-European countries, also in alphabetical order.

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The third part contains the conclusions and recommendations in a chapter titled The Future of Internationalisation of Higher Education, Conclusions and Recommendations for Europe at the Regional, National and Institutional Level. This chapter also includes the scenario resulting from the Delphi Panel.

Although the study provides a rather comprehensive overview of the development and current state of internationalisation of higher education, as well as directions for its future development, we are aware that there are limitations in the way we address several approaches, programmes and activities. Time and size constraints as well as our intention to focus on key trends and issues explain these limitations. Issues such as evidence of the impact of national and institutional strategies, differences by disciplines, recognition of diplomas and degrees, challenges in terms of pedagogy and learning, and linkages to wider global societal challenges have only been touched upon. As will become clear from the study and in particular from several of the country studies such as Spain, current political and economic tensions in the world and in Europe are threatening the future development of international cooperation and exchange. Further study will have to address these issues and potential risks, as in this study we could only identify them as relevant topics. It was not possible in this study to provide broad evidence of the rich experiences at the level of programmes and institutions, or at local and regional level, of good practices in terms of international activities, internationalisation at home and cross-border delivery, cooperation and exchange. There are many stories to be told and the country reports provide some examples of such stories, but the scope of this study cannot do justice to them all. There are other ways to access those practices.

There are also limitations with respect to the literature overview. Over the past 25 years an increasing number of reports, articles, books and book chapters have been published on the internationalisation of higher education, including doctoral theses. It would have been impossible to provide a complete overview of all these publications and make reference to them in the study. We have selected those publications which we consider key documents for the study of internationalisation and those which underline our analysis and argumentation.

The consortium that produced the study expresses its gratitude to the European Parliament, in particular Policy Department B: Structural and Cohesion Policies of the Directorate-General for Internal Policies, for selecting it for this task. The consortium also thanks the authors of the country reports and the authors of Chapters 2 and 3, as well as the three review team members and the two editorial team members, for their valuable contributions to the study. Last but not least, the consortium thanks the many experts from around the world who participated in the Delphi Panel – and in particular Robert Coelen for its realisation – for their insights and important contributions to the future scenario for internationalisation of higher education in Europe.

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1. UNDERSTANDING INTERNATIONALISATION OF HIGHER EDUCATION IN THE EUROPEAN CONTEXT

Hans de Wit and Fiona Hunter

1.1. Introduction

Internationalisation of higher education (IoHE) is a relatively new phenomenon, but one that has evolved into a broad range of understandings and approaches. This introduction will explore both the 'why' of IoHE and the 'what' it has become over the years. This exploration is essential in order to understand the 'how' of internationalisation, as interpreted by the different regions, countries and institutions presented in the following chapters, seeking to reposition themselves in response to the changing global environment. The chapter will outline the historical development of internationalisation as a concept; present the main models, rationales, approaches and strategies as defined in the literature; and highlight the key trends and issues that have emerged in recent years. The main focus is Europe, but the chapter will also make reference to notable developments in other world regions.

1.2. International dimensions: an historical perspective

Universities have always had some international dimension, either in the concept of universal knowledge and related research, or in the movement of students and scholars. Indeed, Altbach (1998, p. 347) identifies the university as the one institution that has always been global. However, the international dimension of higher education has changed dramatically over the centuries into the forms, dimensions and approaches that we see today. These range from the mobility of and competition for students, teachers and scholars; export of academic systems and cultures; research cooperation; knowledge transfer and capacity building; student and staff exchange; internationalisation of the curriculum and of learning outcomes; and cross-border delivery of programmes, projects and institutions; to virtual mobility, digital learning and collaborative online international learning.[1] What we now term 'internationalisation of higher education' is a phenomenon that has emerged over the last 25 years or so, but its roots lie in several manifestations of increased international orientation from the previous centuries, in particular in the period from the end of the Second World War to the end of the Cold War.

1.2.1. Medieval roots

Many publications on the internationalisation of higher education refer back to the Middle Ages and the Renaissance period, when, in addition to religious pilgrims, university students and professors, 'pilgrims or travellers (peregrini) of another kind were also a familiar sight on the roads of Europe. (...) Their pilgrimage (peregrination) was not to Christ's or a saint's tomb, but to a university city where they hoped to find learning, friends, and leisure' (de Ridder-Symoens, 1992, p. 280). This description of the impact of student and scholar mobility on universities and society at that time reminds us of many of the arguments that are evoked to promote mobility today: the use of a common language, recognition of qualifications and the broadening of experiences and views. The fact that the European Commission named its flagship mobility programme after the Dutch philosopher Erasmus, an exemplary pilgrim of that period, reflects this historical connection.

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[1] See, for instance, Knight & De Wit (1995, 1997, 1999), De Wit (2002) and Knight (2008). For an historical account, see De Wit & Merkx (2012).

We can speak of a medieval 'European space' defined by this common religious credence and uniform academic language, programme of study, and system of examinations (Neave, 1997, p. 6). As we (de Wit and Hunter, in press) observe elsewhere, 'this medieval European education space, while limited and scattered in comparison to present mass higher education, is relevant to the current debate on the development of a new European Higher Education Area. One expression is the gradual growth of the English language as the common academic language today, resembling the role of Latin, and in a later period also French, albeit more moderately.' However, only a superficial resemblance and reference between the two periods is possible because of the very different social, cultural, political and economic circumstances.

1.2.2. National models

The historical references to the university as an essentially international institution ignore the fact that most universities originated in the 18th and 19th centuries with a clear national orientation and function (de Wit 2002, p. 3-18). Indeed, de Wit and Merkx (2012, p. 44) note that 'with the emergence of the nation-state, universities became de-Europeanised and nationalised.' Study abroad was often prohibited, and Latin, as the universal language of instruction, was replaced by local languages.

However, in the 20th century, and in particular between the two World Wars, there was an increased focus on international cooperation and exchange in higher education. The creation of the Institute of International Education (IIE) in 1919 in the United States, the Deutscher Akademischer Austauschdienst (DAAD) in Germany in 1925, and the British Council in the UK in 1934, are illustrations of this development, with a strong focus on stimulating peace and mutual understanding under the umbrella of the League of Nations.

This trend received further impetus after the Second World War, although mainly in the United States through the Fulbright Programme, given that Europe was still recovering from the devastation of two wars and concentrating its efforts on reconstruction. It is important to note that, although peace and mutual understanding were the declared driving rationales, 'national security and foreign policy were the real forces behind its expansion, and with it came government funding and regulations' (de Wit and Merkx, 2012, p. 49).

The Cold War became the principal rationale for the internationalisation of higher education, which explains the dominance of national security and foreign policy as the driving forces that fostered programmes in foreign language and area studies in the United States, and provided technical assistance and capacity building to developing countries in Europe and other parts of the industrialised world.

1.2.3. European model(s)

The European Community did not develop an active international higher education policy between 1950 and 1970, but 'the strengthening of the European Community and the rise of Japan as an economic world power challenged US dominance, not only in the political and economic arenas but also in research and teaching. (…) In terms of internationalisation during this period, the international dimension of higher education began to move from the incidental and individual into organised activities, projects, and programmes, based on political rationales and driven more by national governments than by higher education itself' (de Wit and Merkx, 2012, p. 52-53). Nation-states recognised the advantages in supporting 'the expansion of higher education and its internationalisation within and beyond their borders' (Kerr, 1994, p. 50).

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It is in this period that internationalisation emerged as a process and strategy. Until then, it had not been recognised as such and the most commonly used term was 'international education'. Otherwise, terms related to specific activities were used, such as study abroad, exchange, academic mobility, multicultural education or area studies (de Wit, 2013a, 18). The European programmes for research and education, in particular the Erasmus programme in the second half of the 1980s, were the driver for a stronger strategic approach to internationalisation in higher education, similar to the Fulbright programme in the US after the Second World War. The Erasmus programme itself was built out of smaller initiatives that had been introduced in Germany and Sweden in the 1970s and a European pilot programme from the early 1980s.

The original Erasmus programme was later grouped together with similar initiatives in the 1980s under Socrates and more recently under Erasmus+. These programmes were not based on the educational rationales and roles of the European Community until the Treaty of Maastricht in 1992. Rather, they had their foundation in the need for more competitiveness in relation to the rest of the world – at that time primarily the United States and Japan – and in the development of European citizenship. While these rationales are still key drivers in European programmes for education and research, the activities have always been based primarily on cooperation through student and staff exchanges, joint curriculum development and joint research projects. Institutional response to these programmes expanded rapidly in the 1990s, and set a clear path for the European approach to internationalisation.

Within Europe, the United Kingdom was the exception to that rule. In 1980 the Thatcher Government introduced full-cost fees for international students and the main focus of British universities became international student recruitment for income generation. Similar models followed in Australia and other English-speaking countries. Universities may be considered essentially international institutions, but they nevertheless inhabit 'a world of nation-states that have designs on them' (Kerr, 1994, p. 6).

1.2.4.   Shifting rationales

From the second half of the 1990s onwards, there was a gradual shift from political to economic rationales for internationalisation. As we (de Wit and Hunter, in press) note, 'Although after September 11, 2001, a renewed focus has since emerged on political rationales related to the war on terrorism, advocating the need to understand better Islamic culture and their languages, the principle driving force for internationalisation has now become economic.' International student recruitment, preparing graduates for the global labour market, attracting global talent for the knowledge economy, cross-border delivery of education, and capacity building have become important pillars of the internationalisation of higher education over the past decade. The emergence of national and global for-profit higher education conglomerates, franchise operations, articulation programmes, branch campuses, educational hubs, and more recently, virtual learning and Massive Online Open Courseware (MOOCs) are ways in which this development expresses itself.

However, as de Wit and Leask (in press) remark, 'simultaneously with these developments there has been a continuing focus at an institutional and programme or study level on isolated and marginal activities for a minority of students, such as study abroad, exchange, area studies and international student recruitment. Critical reflection on the outcomes of such activities, and in particular their impact on student learning, combined with increasing concern with the state of the world has resulted in a search for new approaches to internationalisation that have deeper meaning and greater impact.'

Within internationalisation, the discourse is shifting from input and output to outcomes. In Europe, the Bologna Process (1999) explored the concept of the learning outcomes of higher education with the aim of making European qualifications more transparent and comparable, and thus more competitive. Since the Bologna Process and the European Union's Lisbon Strategy (2000), which set out to make Europe the most competitive knowledge-based society in the world, competitiveness has increasingly become a driving rationale for IoHE.

European HEIs are strongly influenced by the Erasmus model and still attach great importance to cooperation. Erasmus created the basis for the initiation of the Bologna Process and developed tools and instruments to make it happen, such as the European Credit Transfer System (ECTS). Together, Erasmus and the Bologna Process have not only become an expression of successful intra-regional cooperation and mobility within Europe – as have the framework programmes and to a lesser extent the Lisbon Strategy for research – but have also become models for more intra-regional cooperation and mobility in other world regions.

Until recently, the European emphasis in internationalisation has been on mobility, reacting to European Commission initiatives and with the main goal of increasing the number of incoming and outgoing students within the European Union. In countries such as the UK, but also Australia, where the focus over the last 40 years has been on international student recruitment as a source of income, more attention is now being paid to short-term credit mobility, internationalisation of the curriculum and learning outcomes. Indeed, much of the current research on internationalisation of the curriculum and on global citizenship comes from these countries, including work by authors such as Barker, Green, Leask, Lilley and Whitsed (Australia), and Clifford, Jones, Killick, Montgomery and Ryan (UK).

Both the government and higher education institutions in the UK and in Australia have recognised the importance of employability in a globally connected world, and are paying more attention to short-term study abroad and internationalisation of the curriculum and learning outcomes for their own students. In general, countries and universities are now becoming more proactive in broadening the scope of their international activities and developing relations with other world regions. Cooperation is also understood as a means to compete and internationalisation is increasingly seen as an essential part of the institutional mission. There is a general tendency for universities to develop a more strategic approach to internationalisation.

1.2.5. A new concept: comprehensive internationalisation

Consequently, much of the current discourse now revolves around the concept of comprehensive internationalisation, discussed and defined in detail by Hudzik (2011, 2015) as 'a commitment, confirmed through action, to infuse international and comparative perspectives throughout the teaching, research and service missions of higher education. It shapes institutional ethos and values and touches the entire higher education enterprise. It is essential that it be embraced by institutional leadership, governance, faculty, students, and all academic service and support units. It is an institutional imperative, not just a desirable possibility. Comprehensive internationalisation not only impacts all of campus life but the institution's external frames of reference, partnerships and relations. The global reconfiguration of economies, systems of trade, research and communication, and the impact of global forces on local life, dramatically expand the need for comprehensive internationalisation and the motivations and the purposes driving it' (Hudzik, 2011, p. 6).

Comprehensive internationalisation puts the emphasis on the need to develop an institution-wide approach to internationalisation if it is to make a key contribution to institutional purpose and provide responses to environmental challenges. However, internationalisation in many universities that claim to be international or internationalised institutions does not always match this rhetoric and the reality is often more a collection of fragmented terms and activities, rather than a comprehensive process and concept. It takes time to develop strategic capacity.

1.3. Understanding and enacting internationalisation

The most commonly accepted definition of internationalisation is 'the process of integrating an international, intercultural, or global dimension into the purpose, functions or delivery of post-secondary education' (Knight, 2008, p. 21). However, there is also increasing acknowledgement of the complexity of the concept and its relationship to globalisation and regionalisation, and the role of higher education in those two processes (Altbach, Reisberg and Rumbley, 2009; Kehm and de Wit, 2005; Knight, 2008; Maringe and Foskett, 2010; Scott, 1998; Teichler, 2004). Internationalisation has become a broad umbrella term that covers many dimensions, components, approaches and activities. It includes credit and degree mobility for students, academic exchange and the search for global talent, curriculum development and learning outcomes, franchise operations and branch campuses, for both cooperation and competition.

1.3.1. Internationalisation: abroad and at home

In the broad definition of what internationalisation is, or should be, there are two key components in the internationalisation policies and programmes of higher education that are constantly evolving and becoming increasingly intertwined (Knight, 2008, p. 22-24). One is internationalisation abroad, understood as all forms of education across borders: mobility of people, projects, programmes and providers. The other is internationalisation at home, which is more curriculum-orientated and focuses on activities that develop international or global understanding and intercultural skills. However, internationalisation abroad can also be curriculum-related and develop international or global understanding and intercultural skills, so there are limits to such a distinction.

There are other researchers and commentators who have discussed the division between cooperation and competition (Van der Wende, 2001), between institutional and student-focused internationalisation (Coelen, 2013; Jones, 2010), between the internationalisation ideologies of 'instrumentalism', 'idealism' and 'educationalism' (Stier, 2010), between intercultural, international and global competences (Deardorff, 2006), and between 'internationalisation of the curriculum' and 'internationalisation at home' (Beelen, 2007). However, for the purposes of this report, Knight's two components of internationalisation abroad and at home will be used, since they are widely used and understood.

1.3.2. Internationalisation abroad

International students can be defined as either credit-seeking on short-term international programmes, such as Erasmus, as part of their home degree, or degree-seeking, when they are enrolled in an entire programme abroad. The presence of international students is obviously of interest to the universities that host them, but is also increasingly of interest for governments, cities and a range of other organisations connected to the 'business of higher education'. Mobility of academic staff has developed in a less strategic manner over recent decades but may well take on greater importance through internationalisation of the curriculum. There have also been developments in the mobility of programmes, projects and even institutions, referred to as cross-border (or transnational) education.

1.3.2.1. Credit mobility

Credit mobility plays a significant role in European policies, much more so than in other world regions, although more needs to be known about its impact on employability, skilled migration and degree mobility. In 2012 the European Union celebrated the 25th anniversary of its flagship programme Erasmus; since 1987 over three million mobile students participated in the programme and the number of countries expanded from 11 to 33, including non-EU members such as Croatia, Iceland, Liechtenstein, Norway, Switzerland and Turkey.

The new Erasmus+ programme combines all education programmes at all levels and is open to a range of countries both within and beyond Europe. It has an increased overall budget and while most of the funding goes to individual mobility (with a student mobility target of 20 % by 2020), there are also scholarships for joint masters, student loans, and a budget for strategic partnerships and innovative policy development. In times of budget constraints and political tensions, it is an indication of the importance that Europe has attributed to the internationalisation of higher education.

The Erasmus Impact Study (CHE Consult et al., 2014) confirms the success of the programme, in particular from the viewpoint of employability. According to the study, those who study or do a placement abroad not only gain knowledge in specific disciplines, but also strengthen key transversal skills that are highly valued by employers. The study shows that graduates with international experience fare much better on the job market. They are half as likely to experience long-term unemployment compared with those who have not studied or trained abroad and, five years after graduation, their unemployment rate is 23 % lower.[2]

A recent study, Towards a mobility scoreboard: conditions for learning abroad in Europe (Eurydice, 2013), made recommendations on how to improve the quality of information and guidance for mobility opportunities and to promote the portability of grants and loans so as to encourage more learners to take part. It also referred to the quality of learning mobility in terms of the student experience at the host institution, the nature of services and support that should be provided and the need to ensure recognition of learning outcomes. The study made specific reference to the importance of language learning and acquiring intercultural skills at the early stages of education, and to the use of innovative ICT methods to promote virtual mobility.

The report suggests that while the trend for mobility is positive, there are still constraints. Issues relating to credit recognition, the perception of 'academic tourism', and access for disadvantaged and disabled students still need better solutions. Imbalance between countries and institutions is another challenge, particularly in Central and Eastern Europe, where the interest in outgoing mobility is often stronger than the capacity to attract incoming students.

However, when comparing Europe to the rest of the world, we see more credit mobility here than elsewhere. There are national and institutional policies in the US which advocate study abroad, but currently only 1.4 % of the total student population participates, principally at undergraduate level. Numbers have increased recently but the periods spent abroad are typically shorter (de Wit et al., 2012). Participation rates in Canada and Australia are similar and in other world regions (Latin America, Asia and Africa) student

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[2]   For the key findings from this extensive study see http://europa.eu/rapid/press-release_MEMO-14-534_en.htm.

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mobility or exchange is largely absent, although national programmes have recently been launched in countries such as Brazil and Japan.

1.3.2.2. Staff mobility

When talking of mobility, the focus tends to be on students. However, while European universities often have policies in place to promote student exchange, there is rarely a systematic attempt to promote staff mobility, even though funding is available for academic and, more recently, administrative staff through the Erasmus programme. In addition to Erasmus, many university agreements provide opportunities for academic exchange, for either teaching or research, but very often it is left up to the departments or the individual academics whether or not they wish to take advantage of the opportunity. Those who do engage in academic mobility find that it is not generally recognised for the purposes of career progression (Racké, 2013). While there is a range of national programmes and funding made available in most European countries for academic mobility, these tend to involve short mobility periods of a few days or weeks and are unlikely to create long-term impact in the institutions.

A more strategic approach to academic mobility has clear advantages for enhancing research and teaching as well as general professional development (Colucci, Ferencz, Gaebel and Wächter, 2014). Staff with international experience can bring added value to the classroom, especially in many countries where, because of regulatory and other restrictions, there is very little internationalisation of academic recruitment. Administrative staff mobility receives even less institutional attention although a small number of institutions offer international professional development opportunities as part of their human resources policy (Colucci et al., 2014). Academic (and administrative) mobility is in need of greater attention and strategic direction at national and institutional level.

Postiglione and Altbach (2013, p. 11) clearly state, 'It would seem obvious that those who teach at a university, the academic staff, are key to any academic institution's internationalisation strategy. After all, the professors are the people who teach the classes at a branch campus, create the curricula for franchised programmes, engage in collaborative research with overseas colleagues, welcome international students into their classrooms, publish in international journals, and the like. Indeed, without the full, active and enthusiastic participation of the academics, internationalisation efforts are doomed to fail.'

1.3.2.3. Degree mobility

Global degree mobility doubled between 2000 and 2010 from 2.1 to 4.1 million at an average annual rate of 7.1 % and is forecast to reach seven million in 2020, with Europe still the preferred destination for 41 % of these students. 21 % choose the United States while the fastest growing regions are Latin America and the Caribbean, and the Asia-Pacific region. However, it is the English-speaking destinations that dominate – 37 % in 2010 (US 17 %, UK 13 % and Australia 7 %) – with typically high student fees, while Germany and France follow as non-English-speaking countries with much lower fee structures (OECD, 2012). France has been able to take advantage of strong historical, cultural and linguistic ties while Germany has invested significantly in promoting the country as an international study destination.

In many countries, the rationale for international student recruitment is revenue generation and this may lead to an over-reliance on a small number of countries such as China and India. This not only compromises in-class and on-campus diversity, but also creates potential financial risks and vulnerability. As an increasing number of universities shift to

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teaching in English in order to attract international students, this raises the question of academic quality and the need to think strategically about why an institution should teach in another language, and which programmes it should offer (de Wit, 2012). Other countries such as Germany do not focus on short-term economic gain but maintain their free tuition policy for international students as well. They have a long-term approach to attracting international students and talents, considering them as future ambassadors of the country and making a contribution to its technological development and economy. It sees international student recruitment as a form of soft power.

Another key driver for attracting international students is the need for skilled migrants, reflected in the high number of enrolments in advanced programmes in the face of demographic decline in some countries. Global competition for top talent has seen several countries facilitating access to the job market for highly skilled people or creating scholarship programmes, while at the same time restricting access to education and employment for the less talented or lower skilled. Global rankings play a key role in enhancing the reputation of both countries and institutions. The higher the position in the league tables, the more attractive to international talent the country/institution will be, and the more talent it can attract, the higher it will be placed in the tables.

1.3.2.4. Cross-border delivery

Cross-border or transnational education has been defined as 'award or credit bearing learning undertaken by students who are based in a different country from that of the awarding institution' (O'Mahony, 2014). It can be seen as a phase in the globalisation of higher education that starts with cross-border student flows, then moves to the development of hubs and campuses, and finally generates virtual programme mobility (Varghese, 2013), although only some countries or institutions will follow this pattern.

The growth of branch campuses and franchise operations by foreign universities has been so dramatic that it has been described in a report by the British Council and DAAD (2014) as 'a significant component of higher education in a number of developing countries'. In fact, it should be noted that the majority of these campuses and operations are in emerging and developing countries and are set up mainly by providers in English-speaking countries. 20 % of students enrolled in a first degree in the UK are in fact at an offshore campus, or at a foreign institution that has franchised the programme (Altbach, 2012) and more than 25 % of Australia's international students study offshore.

However, there has been a recent, clear increase in cross-border activity in Europe, as confirmed by a number of studies, including the European Commission report (2014) which identified 253 branch campuses, franchise operations and validation activities in the European Union, again with English-speaking countries as the main, but not sole, providers. As the report states, cross-border activity in Europe is still in its infancy, affecting only a very small number of students, but that does not mean that it is insignificant for the students or institutions involved.

Branch campuses often attract a working population seeking to combine work and study, and so do not have a negative impact on enrolments at traditional campuses (Wilkins and Balakrishnan, 2012). Local students are willing to pay more to attend these international institutions because they see the foreign degree as a means to better employment in their own country. There are advantages for the host countries too, since the presence of foreign universities enables them to increase access to higher education at very little cost.

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However, there have often been issues of quality related to branch campuses and franchise operations. Where franchising arrangements are set up with no direct involvement of the awarding institution, there is a danger of substandard quality and the 'McDonaldization of higher education' (Altbach, 2012). Undoubtedly, offshore activities are high risk and there can be a range of reasons for poor performance (Fielden, 2013). While some do indeed fail, it should be recognised there are also those who provide high standards of education and make positive contributions to the achievement of the social and economic development goals of the host country.

1.3.2.5. Future trends in internationalisation abroad

While there is a complex interplay of many variables affecting internationalisation abroad, the upward trend is expected to increase in the years to come for both cooperation and competition. The number of credit-seeking students will continue to grow and it is likely that other countries or regions will also emulate Erasmus+ as a scholarship scheme. While international student recruitment will continue to be dominated by the major sending and receiving countries, many of the current sending countries such as China, India, Malaysia, Singapore, South Africa and South Korea will also seek to attract an increasing number of students to their countries' institutions. Although degree-seeking students will continue to be privately funded, there will be more national scholarship schemes to develop or attract talent. While the physical mobility of students will continue to grow, there will also be stronger development of the mobility of programmes and institutions. We can also expect to see an increase in virtual exchanges, collaborative online international learning, and blended learning, which combines face-to-face learning with online learning experiences.

1.3.3. Internationalisation at home (IaH)

Internationalisation at home focuses on the curriculum, teaching and learning, and learning outcomes. It developed in Europe in 1999 through the 'Internationalisation at Home' movement as a reaction to the strong focus on mobility and the Erasmus mobility target of 10 % of students, with the goal of providing an international dimension to the other 90 %.

It was originally defined as 'any internationally related activity with the exception of outbound student and staff mobility' (Crowther, Joris, Otten, Nilsson, Teekens and Wächter, 2001, p. 8) but was later better described as 'a set of instruments and activities "at home" that focus on developing international and intercultural competences in all students' (Beelen and Leask, 2011). A recent revisiting of the term has led to a revised definition of IaH as 'the purposeful integration of international and intercultural dimensions into the formal and informal curriculum for all students within domestic learning environments' (Beelen and Jones, 2015).

In referring to 'domestic learning environments' Beelen and Jones (2015) stress that the activities can extend beyond the classroom and the campus into the local community. They also point out that while IaH can benefit from the presence of international students and offer an opportunity for their integration, it can also take place with only local students, who may bring their own diverse backgrounds to the learning experience.

Developing and assessing intercultural and international competences is an essential part of IaH and one that is increasingly being recognised by higher education, although there is still much to be done in defining how these competences can or should be developed and assessed (Deardorff and Jones, 2012; Deardorff and van Gaalen, 2012). A purposeful integration of the international and intercultural dimension requires 'the articulation and assessment of internationalised learning outcomes within the specific context of a discipline

which will allow such environments to be used as a means of achieving meaningful international and intercultural learning' (Beelen and Jones, 2015)

1.3.3.1. Internationalisation of the curriculum (IoC)

Increasingly, universities see internationalisation of the curriculum as a means of preparing their graduates to live and work in a globalised world but, like internationalisation of higher education itself, there is considerable variation in the way in which IoC is defined and enacted in different regional and national contexts. While growing importance is being attached to incorporating an international dimension into the curriculum, which is also reflected in the European Commission's European Higher Education in the World strategy, operationalisation within the institutions remains a challenge. Academic staff may not always understand the meaning of the term, or have the ability (or the desire) to design and deliver internationalised curricula (Green and Whitsed 2015).

A good starting point therefore is a clear definition. Several definitions exist and one of the most commonly used defines internationalisation of the curriculum as 'the incorporation of an international and intercultural dimension into the preparation, delivery and outcomes of a programme of study' (Leask, 2009, p. 209) so that it 'purposefully develops all students' international and intercultural perspectives as global professio nals and citizens' (Leask, 2009). There is an obvious overlap with the concept of internationalisation at home (IaH), in that IoC is also focused on all students, not just the mobile minority, and Leask (2009) argues that it is possible to internationalise both the formal and the informal curriculum at home.

The formal curriculum is understood as the syllabus itself and all the associated planned activities while the informal curriculum is understood as additional non-assessed activities and student services that may support learning. Leask (2015) also draws attention to the hidden curriculum, understood as the implicit and often unintended messages communicated about which knowledge is considered important. She raises a fundamental point about IoC in that it is 'a mutually engaging intercultural conversation in which we are all likely to need to make adjustments to our behaviour and world view' (p. 8).

Leask has recently revised her own definition to read 'the incorporation of international, intercultural and/or global dimensions into the content of the curriculum as well as the learning outcomes, assessment tasks, teaching methods and support services of a program of study' (Leask, 2015, p. 9). This definition highlights how IaH and IoC are both broadening and converging as concepts.

Internationalisation of the curriculum is a process that will lead to a product, the internationalised curriculum, which 'will engage students with internationally informed research and cultural and linguistic diversity and purposefully develop the international and intercultural perspectives as global professionals and citizens' (Leask 2009, p. 209). This implies significant change since learning outcomes, content, teaching and learning activities and assessment tasks all need to be internationalised through a planned and systematic process to ensure that all students develop international, intercultural and global perspectives as the result of their involvement in an internationalised curriculum.

A range of tools is available to staff seeking to internationalise learning for all. They can use 'comparative international literature, guest lectures by speakers from local cultural groups or international companies, guest lectures of international partner universities, international case studies and practice or increasingly, digital learning and on-line collaboration. Indeed technology-based solutions can ensure equal access to internationalisation opportunities for

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all students' (Beelen and Jones, 2015). International opportunities through mobility and double or joint degrees remain important and can be integrated into these curricula, but since in most cases they will be offered only to a minority of students, it is essential to ensure the international dimension is present even without them.

Student diversity and the perspectives that they bring to the classroom are key resources for the internationalised curriculum. The Department of Education, Employment and Workplace Relations (DEEWR) in Australia has published 'Good Practice Principles for Teaching across Cultures' that highlight the importance of focussing on students as learners, respecting and adjusting for diversity, providing context-specific information and support, enabling meaningful intercultural dialogue and engagement, being adaptable, flexible and responsive to evidence, and preparing students for life in a globalised world (Leask 2015).

It is clear from these definitions and examples that simply switching the medium of instruction to English (or any other language) for an international group of students does not constitute an internationalised curriculum. It is the content, the pedagogical approach and the learning outcomes, as well as the support services, that need to be internationalised if a meaningful international experience is to be offered to all students. These changes require institutional commitment to change, but also, most importantly, academic engagement. An approach that moves away from providing isolated experiences to a few students and towards providing internationalised learning for all – in whatever combination of 'at home' or 'abroad' – is a significant challenge that requires long-term commitment and resources (Green and Whitsed, 2015; Leask, 2015).

1.3.3.2. Global citizenship

Global citizenship is a term that is used increasingly in a curriculum-orientated approach to internationalisation that sees the principal outcome of international education as educating graduates able to live and work in a global society (Deardorff and Jones, 2012). It has become the focus of much research in recent years, and various understandings of the term have emerged. Living and working in a global society implies both social and professional aspects and while the original focus was on the social aspect, it is employability that is moving to the forefront in a shift from 'knowledge, understanding and action' to 'knowledge, skills and economic competitiveness' (Ashwill and Oanh 2009).

Killick argues that 'much of the literature on global citizenship is concerned with those capabilities which such a person should exhibit – the knowledge they should hold, the skills they should possess and the ethics they should espouse and in many cases, the acts they should perform' instead of 'the global citizen as a way of being-in-the-world which requires primarily a sense of how I am among those with whom I share the planet – my sense of self-in-the-world, and a set of capabilities which then enable me to act-in-the-world' (Killick, 2013).

There are those who claim that global citizenship is a concept that sits uncomfortably in capitalist societies and requires a rethinking of the purpose of higher education (Clifford and Montgomery, 2014) or that there should be an additional focus on peacebuilding (Chao, 2014). While it is a complex and contested concept, the three key dimensions that tend to emerge are social responsibility, global competence and civic engagement (Morais and Ogden, 2011).

Global citizenship is often linked to the transformative effects of mobility (Morais and Ogden, 2011) while in other cases internationalisation of the curriculum (IoC) is identified

as a strategy to prepare global citizens (Leask and Bridge, 2013). The idea may be articulated through the university's mission or its internationalisation policy (Lilley et al., 2015) but its exact meaning or how it is to be achieved are not always clearly discernible.

Lilley (2014) has recently defined global citizenship as: 'an attitude or disposition towards others and the world; underpinned by moral and transformative cosmopolitanism and liberal values (openness, tolerance, respect and responsibility for self, others and the planet); more than a technical efficiency or competence; a mind-set for mature, critical, ethical and interconnected thinking; underpinned by ethical capacities that cannot be easily captured by surveys or quantitative measurement; positioned along a continuum of development; a non-prescriptive and variable concept'.

Lilley et al. (2014) have also proposed a conceptual model for global citizen learning and an 'identikit' of markers for a global citizen disposition that provide practical insight as to what a global citizen might look like as a learning outcome and align the idea of educating students to become global citizens both with the internationalisation of higher education and with employability agendas.

There is much debate around the terms 'global citizen' and 'global competence' and both are the subject of increasing attention in all kinds of higher education policy documents, but also in more generic debates on citizenship and identity by entities such as the European Commission, the OECD and the United Nations. The terms are increasingly used in institutional strategies for internationalisation in higher education, as the findings of the IAU Global Survey and the EAIE Barometer (Chapter 2) demonstrate. This focus on global citizenship and global competence has two dimensions: competence as global professionals is strongly related to the need for employability in a globally connected world, while citizenship is more aligned with raising awareness and commitment to global issues such as health, poverty and climate, as indicated in the UN Sustainable Development Goals. Moving from using these two terms and other related ones in official documents and in mission and vision statements towards concrete meaning and action is one of the main challenges that higher education and its internationalisation will encounter in the years to come.

1.3.3.3. Future trends in internationalisation at home

All trends point to a stronger focus on internationalisation at home, both through the curriculum and through global citizenship, however it might be understood. IaH and associated terms and concepts are increasingly appearing in European, national and institutional policy documents, although much is still to be done at the level of implementation. The objectives set by the 2015 Ministerial Conference for the Bologna Process in Yerevan provide strong impetus to the role of the curriculum in internationalisation (EHEA 2015). The first objective, that of graduate employability, calls for greater attention to competences not only through improved dialogue with the labour market and continued attention to international mobility but also through enhanced curricula. The second objective is that of greater inclusiveness in higher education, especially for marginalised groups from immigrant backgrounds, which will have implications for the type of curricula that are offered. The third objective is the enhancement of the quality and relevance of learning and teaching where internationalisation of the curriculum can become a driving force for change.

A stronger focus on curriculum and learning outcomes is likely to encourage greater academic engagement in internationalisation. Indeed, the involvement of academics

becomes imperative. However, appropriate professional development programmes will need to be put in place to ensure that staff are able to design and deliver internationalised curricula. International experience in itself is not enough. Such changes could also lead to a more systematic approach to academic mobility, both incoming and outgoing, as a means to support internationalisation of the curriculum.

Virtual mobility and collaborative online international learning are new tools for an international experience at home, and reflect the growing links between ICT, social media and internationalisation. Currently, many small-scale projects are being developed and are likely to become more popular, especially where funding is available, as a means to foster cooperation and exchange between students and staff in the virtual classroom.

1.3.4. Partnerships

Whether for internationalisation abroad or at home, for cooperation or competition, it is evident that academic partnerships have become a defining feature of higher education and an essential part of internationalisation. This is also reflected in the European Commission's strategy for internationalisation, European Higher Education in the World, where partnerships are one of the three key pillars.

Partnerships are not only increasingly international but also involve a broader range of stakeholders. Partnerships exist between universities or departments, between universities and schools, between governments and universities, between industry and universities, and between local and overseas universities. Within this growing interest in a diverse range of partnerships, there is a danger of elitism which can exclude institutions and regions and create a 'divided higher education space', typically favouring the North more than the Global South.

When universities work together internationally, the activities are likely to cover one or more of the following: student and/or staff exchange, research co-operation, joint curriculum development, joint or double degrees, short course programmes, benchmarking, delivery of transnational education, joint bids for international projects, and development projects in a third country (Stockley and de Wit, 2011).

In general, a number of trends can be observed in international higher education partnerships as universities take on a more strategic approach to identifying partners. This implies building longer-term, sustainable partnerships with a stronger focus on content and outcome and including a range of activities in both education and research. The partnerships may be multilateral, and go beyond higher education to work with local governments, the private sector and NGOs. In Europe in particular, substantial advancements are being made in educational partnerships for joint programmes, and where the legislation permits it, there has been rapid growth in double/joint degrees.

Many of these partnerships may be based on cooperation activities, but the goal is often to become more competitive. Increasingly, HEIs are careful in choosing their key partners and pay attention to both the similarity of focus and complementarity of skills and knowledge, to ensure that there is shared interest and added value for all parties involved.

1.4. Influences and interests in internationalisation

Any study on IoHE has to take into account the broad diversity, and identify and analyse the global, regional, national and institutional commonalities and differences in the development of internationalisation if it is to understand, influence and support the process of internationalisation in higher education. It is driven by a dynamic and constantly evolving combination of political, economic, socio-cultural and academic rationales (de Wit, 2002) that will take on different forms and dimensions both in the different regions and countries, and in the institutions and their programmes.

As Frolich and Veiga (2005, p. 169-170) point out, internationalisation in higher education, like higher education itself, although increasingly influenced by and acting in a globalised context, is still predominantly defined by regional, national and institutional laws and regulations, cultures and structures. There is not one universally applicable model. Regional and national differences are varied and constantly evolving and the same is true within the institutions themselves (public/private, research/applied sciences, comprehensive/specialised, etc.).[3]

However, 'as the international dimension of higher education gains more attention and recognition, people tend to use it in the way that best suits their purpose' (de Wit, 2002, p. 14) and this has led to many myths (Knight, 2011) and misconceptions (de Wit, 2011) concerning IoHE. Indeed, de Wit (2013a,b) and others have highlighted the fundamental point that internationalisation should not be seen as an end in itself but rather as a means to enhance the quality of teaching, research and the service role of higher education to society.

1.4.1. Multiple approaches with different goals

In the current environment, internationalisation of higher education is identified as a response to globalisation, and it is in that response that it shifts away from social to more political and economic rationales, from cooperation to competition and to the emergence of new dimensions such as virtual learning and cross-border delivery. This multi-faceted internationalisation covers a host of different rationales, strategies, approaches, activities and dimensions, sometimes complementing and on other occasions conflicting with each other, and is perceived by some as beneficial and by others as negative or at least unintended in its consequences (International Association of Universities, 2012a, 2012b; Knight, 2008).

In reaction to increased commercialisation and competition, there are calls for greater social cohesion and attention to the public role of higher education. It is questioned whether the university as an institution is losing its social, cultural and intellectual objectives and becoming simply a producer of commodities for an international market (Naidoo and Jamieson, 2005). There is also the danger of a widening gap between developed and developing countries through the large-scale emigration of talent (Wilson, 2013).

As a consequence, new and sometimes even conflicting dimensions, views and elements are emerging in the discourse of internationalisation.[4] Affirming Academic Values in Internationalisation of Higher Education: A Call for Action by the International Association

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[3] This diversity is also the reason for increasing the number of countries in this report.

[4] For an analysis of the need to rethink internationalisation, see De Wit (2013b) and International Association of Universities (2012a).

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of Universities (2012b) brings the core values and objectives of internationalisation back to the forefront and highlights the need for greater attention to be paid to the risks and challenges of internationalisation alongside the benefits.

1.4.2. Evaluating internationalisation

As internationalisation grows in importance, it is increasingly subject to measurement (Brandenburg, Ermel, Federkeil, Fuchs, Gross and Menn, 2009). A recent phenomenon has been the emergence of global rankings and much has been said about their positive and negative impacts. A recent European University Association (EUA) study (2013) concludes that 'while HEIs can be highly critical of what is being measured and how, (…) they can still use rankings in a variety of ways: 1) to fill an information gap, 2) for benchmarking 3) to inform institutional decision making and last, but by no means least, 4) in their marketing efforts' (Hazelkorn, Loukkola and Zhang, 2014). The study considers international rankings as an inevitable by-product of globalisation that will only intensify in the future and encourages universities to enhance their internal capacity to provide meaningful information about their performance.

It also highlights that 'results of rankings are regularly produced as a league table not only of "world class universities" but also of their host nations, because of the way results are often tabulated according to countries. This reflects both the importance of HEIs to national economic competitiveness and the benefits of continual investment in higher education and research and development. As a result, rankings today are less about informing student choice and more about the geopolitical position of HEIs and countries' (Hazelkorn et al., 2014, p. 16).

While most international rankings place universities in a comparative framework according to research output and/or education quality, Times Higher Education has produced a ranking of the most international universities, based on three measurements: proportion of international students, international faculty, and internationally partnered research papers. Knight (forthcoming) criticises this approach as being overly narrow and under-representative of 'the richness and diversity of activities undertaken by higher education institutions to become more international and intercultural'.

In an attempt to review and evaluate internationalisation, national governments and HEIs, as well as the Bologna Process, have addressed the issue of quality assurance and how IoHE contributes to the quality of education. There has also been an increased focus on the internationalisation of quality assurance, and the way national accreditation mechanisms within Europe cooperate in developing common standards and indicators and mutually recognising their accreditation decisions.

Over the years, several attempts have been made to develop instruments to assess these two dimensions. These include the Internationalisation Quality Review Process by IMHE/OECD (de Wit and Knight, 1999), the Internationalisation of Universities audit by the German Rectors' Conference (n.d.), the Indicators for Mapping and Profiling Internationalisation (IMPI, n.d.) project led by CHE Consult, the Internationalisation Strategies Advisory Service (ISAS) of the International Association of Universities (IAU, 2015) and the Mapping Internationalisation (MINT) tool by Nuffic (2014) in the Netherlands.

In 2009, the Dutch Flemish Accreditation Organisation (NVAO) developed an assessment framework for the 'Distinctive (Quality) Feature Internationalisation', and in 2014-2015 it was piloted at the European level by the European Consortium for Accreditation (ECA) as

the 'Certificate for Quality in Internationalisation', or CeQuInt (ECA, n.d.). This certificate is for both institutions and programmes and assesses performance levels in internationalisation.

As the higher education agenda becomes increasingly internationalised and cross-border initiatives such as franchise operations, branch campuses, distance learning and joint and double degree programmes impact on accreditation and quality assurance, accreditation agencies are required to look into these developments and address the often complex issues related to them.[5]

1.5. Europe and internationalisation[6]

1.5.1. Impact of European programmes

Internationalisation in Europe has grown out of, and been strongly influenced by, the Erasmus programme initiated by the European Commission almost 30 years ago. Beyond the three million mobile students, Erasmus has had an even greater impact on the internationalisation and reform of higher education. It piloted the European Credit Transfer System (ECTS) and initiated access to EU membership for countries in Central and Eastern Europe and other aspiring candidates.

It paved the way for the Bologna Process and the realisation of the European Higher Education area, which in turn has generated the European Commission's first comprehensive internationalisation strategy: European Higher Education in the World (2013). It has inspired cooperation between Europe and the rest of the world. It continues to act as a model and inspiration for others, even though no comparable initiatives have yet been developed.

Horizon 2020, the framework programmes and their predecessors over the last 35 years have also had an impact on the international and European dimension of higher education, as have the collaborative programmes with the rest of the world, such as TEMPUS, ALFA and ALBAN, ATLANTIS and others, now brought together with the European mobility schemes in the new Erasmus+ programme.

1.5.2. Institutional responses

The many European initiatives have stimulated both national governments and HEIs to develop internationalisation strategies, including more recently at the programme level.[7] The IAU Global Survey (Egron-Polak and Hudson, 2014), the EAIE Barometer and other studies all concur that international strategies are becoming commonplace in universities. The EUA study (2013) 'Internationalisation in European Higher Education: European policies, institutional strategies and EUA support' also highlights the expectations of a European Union strategy as a means to promote internationalisation and providing funding for exchange and cooperation. Interestingly, even non-EU respondents thought that an EU strategy could have a positive impact on their own national and institutional strategies.

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[5]   See for instance the work by the European Consortium for Accreditation on joint programmes (http://ecahe.eu/w/index.php/Publications_regarding_joint_programmes).

[6]   For an account of the internationalisation of higher education in Europe over the past 25 years, see for instance de Wit and Hunter (2013).

[7]   See for instance Aerden et al., 2013, and the current CeQuInt pilot by the European Consortium for Accreditation (ECA, n.d.).

The drive to internationalise is a key preoccupation in higher education today as a means to face the competitive pressures of the new environment. Nevertheless, what and how to internationalise, which balance of activities and approaches to use, and which stakeholders to involve are questions that institutions often struggle to answer. What is apparent however is that an ad hoc approach to internationalisation will not produce an appropriate response.

Although there is a more coherent approach by the European Union towards its international and European dimension, there is still a substantial difference in rationales and strategies among the Member States and their higher education institutions, as highlighted by the countries described in this report. It is apparent that many are rethinking the role of internationalisation and seeking to develop a more strategic response.

This becomes essential as internationalisation of higher education itself becomes globalised (Jones and de Wit, 2012). It is emerging as a key priority in all world regions and new models and approaches emerge as a means to position countries and institutions, as highlighted in the selection of non-European countries in this report. While Europe is perceived as a key partner by many, cases of intra-regional and South-South cooperation between developing countries represent a clear shift in the focus away from an exclusively North-South model and Western models of internationalisation.

European and national policymakers may provide direction or offer funding support, but it is in the universities that internationalisation takes place. As internationalisation moves from the margins to the centre of institutional, national and international attention, the need for greater systematisation of activities becomes paramount, and as higher education institutions seek, or struggle, to make sense of internationalisation, they also begin to engage in more strategic behaviour as a means to achieve their international goals. Alongside the many understandings of and rationales for internationalisation, there is also a very broad range of strategic ability across institutions, even within the same national context.

Implementing a more strategic approach while developing a more coherent international dimension in an increasingly competitive and uncertain environment often takes universities into uncharted waters. For many it is not a free choice but an inevitable one, and many are operating in less than ideal circumstances when the change becomes an externally driven imperative. Many strategies for internationalisation are introduced on a trial-and-error basis, with varying degrees of success. There is much to learn from the experiences across a broad range of national and institutional contexts to help universities (and governments) identify and develop a successful and sustainable international dimension.

Nolan and Hunter (2012) point out that every successfully internationalised university succeeds in its own particular way, while universities that fail to internationalise tend to do so in remarkably similar ways. This implies that it would be beneficial to any policymaker or institution to become more informed about the fundamental factors, elements and conditions that promote or discourage internationalisation efforts before embarking on a strategic initiative in internationalisation. There is now so much at stake.

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1.6. Concluding remarks

In this chapter, we have provided an overview, based on literature and documents, of major developments, trends and approaches in the internationalisation of higher education, with a specific focus on Europe. A picture emerges of a broad, varied and constantly evolving notion of how internationalisation is understood and enacted as higher education seeks to respond to the increasing globalisation of our societies and economies. Chapter 2 provides a more detailed account of perceptions and trends in internationalisation at the European and global level, followed by a report on the developments in digital learning and 17 country reports that explore how internationalisation strategies are being developed in a range of European and non-European countries at both national and institutional level.

The picture is necessarily one of broad brushstrokes but it seeks to highlight the different understandings and enactments of internationalisation in the different specific contexts, how these impact the strategies and approaches undertaken, where successes are achieved and where solutions to challenges are still to be found. Overall, it presents an optimistic perspective but, at the same time, one that is challenged by increasingly profound social, economic and cultural issues, such as the financial crisis, unfavourable demographic trends, immigration and ethnic and religious tensions. These challenges have a potential negative impact on the drive for increased internationalisation but they also create greater awareness of its importance in developing a meaningful response.

2. QUANTIFYING INTERNATIONALISATION – EMPIRICAL EVIDENCE OF INTERNATIONALISATION OF HIGHER EDUCATION IN EUROPE

Eva Egron-Polak, Ross Hudson and Anna-Malin Sandstrom

2.1. Introduction

In 2013-14 the International Association of Universities (IAU) and the European Association for International Education (EAIE), respectively, conducted two large scale surveys on internationalisation. The fourth edition of the IAU survey was sent to the Head of Institution and or Head of Internationalisation in over 6 800 higher education institutions (HEIs) around the world, and was completed by representatives of 1 336 HEIs in 131 different countries, including 608 institutions in 44 countries in Europe. The report, entitled Internationalisation of Higher Education: Growing expectations, fundamental values and known as the IAU 4th Global Survey, was published in April 2014 (Egron-Polak and Hudson, 2014). The EAIE survey, whose title is EAIE Barometer: Internationalisation in Europe, was sent to more than 12 000 people and was completed by 2 093 individual respondents from approximately 1 500 HEIs in 33 countries in the European Higher Education Area (EHEA).[8] The EAIE survey, seeking perceptions from individuals, allowed for multiple responses per institution, while the IAU survey, focusing on institutions, did not.

The 4th Global Survey asked a range of questions that focused on institution-level data to monitor trends in perceptions of internationalisation and related policy-making, management and activities within universities, whilst the EAIE Barometer was more focused on collecting data from internationalisation practitioners about their views on internationalisation and its characteristics as it pertains to their work in the field.

This chapter offers an evidence-based overview of trends in the internationalisation of higher education, comparing and analysing some of the findings of the two surveys. In the case of the IAU 4th Global Survey, it draws particular attention to the results collected from European respondent institutions to make its data more easily comparable with the EAIE Barometer. The chapter begins with a brief description of the two surveys and then analyses a selection of the results under the following five broad themes:

- A. Internationalisation policy/strategy
- B. Benefits, drivers and values of internationalisation
- C. Risks and challenges of internationalisation
- D. Geographic priorities for internationalisation
- E. Internationalisation activities and funding

The chapter ends with some overarching conclusions about trends in internationalisation in the European region based on the results of the two surveys.

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[8] The EAIE Barometer results are presented as a 'weighted' EHEA average i.e. the average of the country averages.

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2.2. IAU 4th Global Survey on Internationalisation of Higher Education

The 4th Global Survey collected data on the academic year 2012. Figure 1 presents the regional breakdown of all respondent institutions.

Figure 1: Number and regional distribution of respondents (n=1336)

Number and regional distribution of respondents (n=1336)

Africa - 114
Asia & Pacific - 164
Europe - 604
Latin America & Caribbean - 141
Middle East - 60
North America - 253
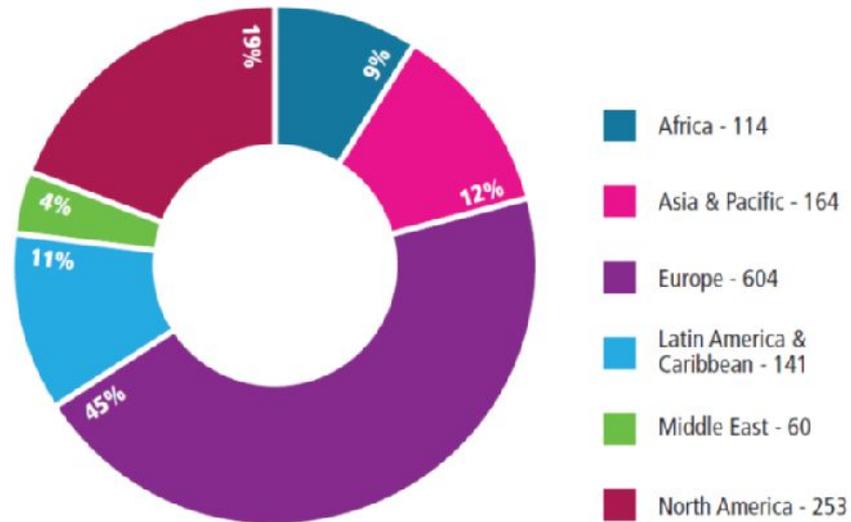
For the most part (over 60 % in each case), the respondents were in public institutions that focus on both teaching/learning and research, offer programmes at all degree levels, and are relatively small in terms of full-time equivalent (FTE) student enrolments, with 54 % having 10 000 students or fewer.

Among the 604 European higher education institutions in 44 countries that replied to the IAU Global Survey, the largest numbers of institutions were from Germany, France and Poland, as can be seen below and which is relatively congruent with the overall number of HEIs.

Figure 2: Institutional respondents by country – Europe – IAU 4th Global Survey (n=604)
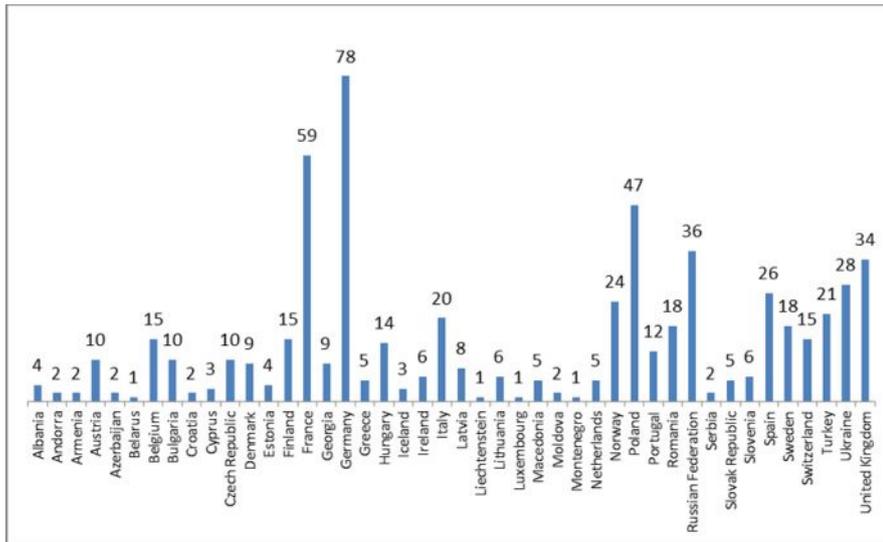
2.3. The EAIE Barometer: Internationalisation in Europe

The EAIE Barometer covers data collected in 2014; the full report will be available in 2015.

Three quarters of the respondents worked at institutions where a doctoral degree was the highest degree level offered. Similarly, a clear majority (60 %) of the respondents worked at publicly-funded institutions, and 72 % worked in institutions with up to 20 000 students. As seen below, the country breakdown for this survey is quite different, with the largest number of individuals responding from the Netherlands, Greece and United Kingdom.

Figure 3: Respondent individuals by country – EAIE Barometer (n=2,093)
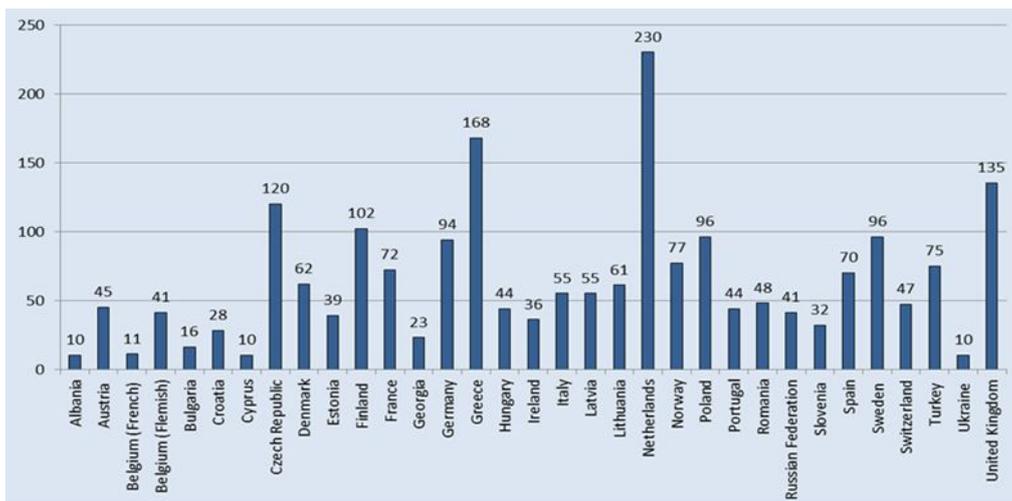
The option of having multiple respondents from each institution explains the difference. Some of these variations make it interesting to consider investigating the average number of people who work directly on various aspects of internationalisation in HEIs in different countries to determine whether or not there are major variations.

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2.4.   Institutional policy/strategy

A key element in the advancement of internationalisation of higher education in universities is the presence of an institutional policy or strategy. However, the results of the IAU study show that there are quite substantial differences among institutions in different world regions regarding the presence of such a policy. In Europe, when compared to other regions, a larger proportion of institutions indicated that they had an internationalisation policy in place (61 %). This response is 20 % higher than in Africa, where respondent institutions indicated far less frequently that they already had such a policy. Indeed, the two regions where the lowest proportion of respondents report having an internationalisation policy are North America (44 %) and Africa (40 %). In addition, it is interesting to note that respondent institutions in North America were the most likely not to have a policy or strategy for internationalisation (14 %), followed by Africa (11 %). In the case of North America, it could very well be a sign that internationalisation has been mainstreamed, whereas in Europe this is perhaps not the case as frequently, with only 15 % of the respondents reporting this to be the case. Also, in many European institutions the internationalisation policy distinguishes between activities taking place within the context of regional cooperation (EU and the Bologna Process), and internationalisation more generally.

Figure 4: Internationalisation policy – regional results – IAU 4th Global Survey
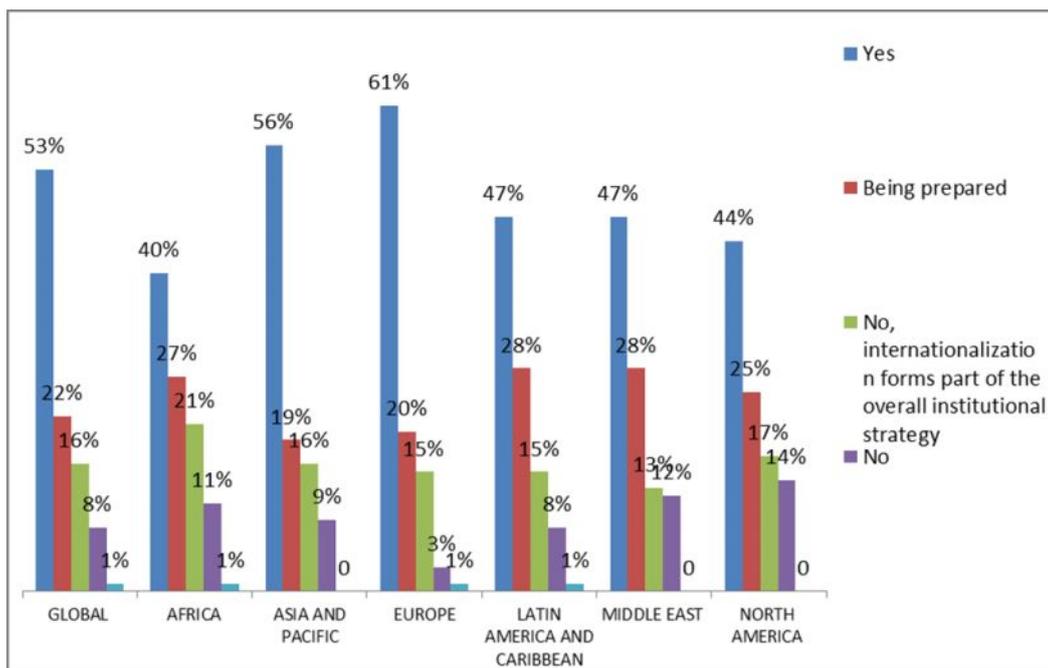
The two surveys present significant differences in results from European respondents, which are worth underlining. For example, as detailed above, 61 % of the European respondents to the IAU Global Survey indicated that they had a specific internationalisation policy, with a further 15 % indicating that internationalisation forms part of the overall strategy of the institution. When respondents to the EAIE study were asked the same question, 38 % indicated that their institution had a specific internationalisation strategy, with a further 46 % detailing that internationalisation was, instead, one of the key priority areas included in the overall institutional strategy. In addition, 20 % of respondents to the IAU study stated that an internationalisation policy was currently being prepared, whereas in the EAIE study, only 11 % of respondents noted that this was the case. It is interesting as well that a similar study of internationalisation conducted by the European University

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Association (EUA) in 2013 noted that 56 % of their 132 respondent institutions, from 24 EU Member states, had a specific internationalisation strategy, with a further 30 % indicating that although they did not have such a strategy, internationalisation formed part of other institutional strategies.

It must also be underlined that the differences in findings between the IAU and EAIE surveys may be due to the difference in the institutions represented in the two surveys and/or to the differences in the individual respondents themselves. The two survey samples therefore represent different perspectives on the institutional policies and day-to-day management of internationalisation.

With respect to the presence of internationalisation strategies/policies, there are also variations between European countries surveyed in the EAIE Barometer. In Belgium (French), Finland and Ireland, all respondents report having either a separate strategy or indicate that internationalisation has been integrated into the overall institutional strategy, whereas almost a third of the respondents in Germany, Croatia, Bulgaria and Poland indicate that their institution had no internationalisation strategy in place. It is clear, however, that internationalisation is a key priority focus for the European HEIs surveyed – with the majority of institutions either having a specific strategy for internationalisation, or having internationalisation as a key focus of their wider institutional goals.

It might be interesting to gain a more detailed understanding of these institutional approaches, to get a clearer picture of the nature of the strategies that exist and to determine whether or not there is a difference between institutions in countries that have a national policy in place and those that do not.

2.5. Benefits of internationalisation

Although many institutions are ascribing greater importance to internationalisation and see it as adding value to the entire institution, it is useful to explore what this means in practice. For example, what specific benefits are expected to be brought by the process?

The results of the IAU Global Survey show a strong clustering around the same three highest-ranked benefits of internationalisation at the global level, though the rankings – and thus the level of importance assigned to these benefits – differ between regions. In Europe, the most important benefit identified by HEIs was Improved quality of teaching and learning, but, for example, in Asia and Pacific and in North America, it was Increased international awareness of / deeper engagement with global issues by students.

Table 1: Three top-ranked benefits of internationalisation – regional results – IAU 4th Global Survey

	Global	Africa	Asia and Pacific	Europe	Latin America and Caribbean	Middle East	North America
Increased international awareness of / deeper engagement with global issues by students	1		1	3	3		1
Improved quality of teaching and learning	2	3	2	1	2	1	3
Enhanced international cooperation and capacity-building	3	2		2		2	
Strengthened institutional research and knowledge production capacity		1	3			3	
Enhanced internationalisation of the curriculum							2
Enhanced prestige/profile for the institution							
Increased international networking by faculty and researchers					1		
Increased/diversified revenue generation							
Opportunity to benchmark/compare institutional performance within the context of international good practice							
Other							

This emphasis on quality and on student learning is echoed in the EAIE study. Indeed, the EAIE Barometer respondents identify Improve the overall quality of education at our institution and Prepare students for a global world as the two most important benefits to be derived from internationalisation.

The two surveys do, however, also reveal certain differences. For example, the benefit of internationalisation ranked second-highest for the European HEIs in the IAU Global Survey was Enhanced international cooperation and capacity-building, which was ranked lowest among the EAIE Barometer respondents, as seen in Figure 6. This is quite a marked difference between the two surveys. Perhaps at the level of the institutional leadership the ideals of cooperation and international development may resonate more strongly than with the practitioners who constitute the core of the EAIE survey and who may be held accountable for showing how internationalisation benefits students. This discrepancy would merit further investigation.

Figure 5: What are the most important reasons for your institution to focus on internationalisation? – EAIE Barometer; EHEA average (8 most common answering options)
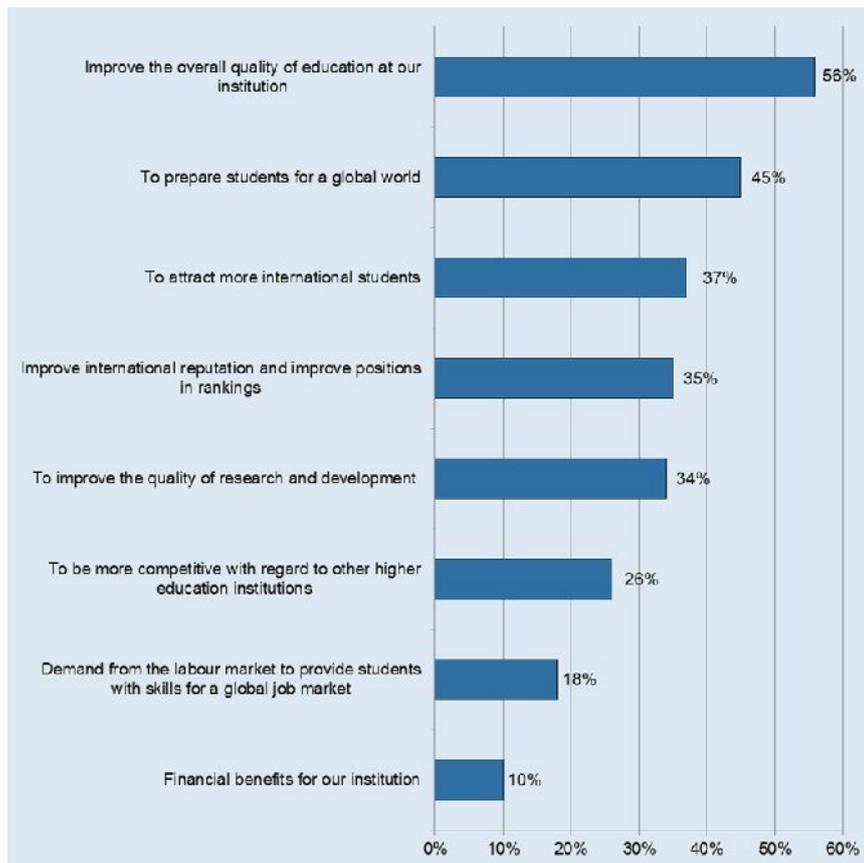
The IAU Global Survey serves to point out that different benefits are important to institutions in different regions of the world and this may impact on how institutions in Europe and elsewhere pursue internationalisation and what emphasis they place on various aspects of their strategies with different partners. A case in point is, for example, the African institutions' priority on seeking Strengthened institutional research and knowledge production capacity through internationalisation, which is also among the three top-ranked benefits for HEIs in Asia and the Pacific and those in the Middle East. Thus the collaborative strategies and initiatives that European HEIs may wish to pursue with institutions in these regions need to be developed keeping this in mind or at least acknowledging that these goals are important to their partners.

2.6.   Drivers of internationalisation

An institution's internationalisation policy or strategy and the activities that it prioritises will be affected by what and/or who is driving the process. Thus internationalisation strategies can be dictated by stakeholders within the institution or by pressures and forces external to it, including national or regional policies. For this reason, both the IAU and EAIE questionnaires included distinct questions to investigate such drivers.

2.6.1.   Internal drivers
Having an internationalisation strategy in place is crucial, but it is equally important to determine who is driving the process and to assign the responsibility for this area to a specific position or entity within the institution. In both surveys, the leadership of the

institution plays a strong role in both aspects. The IAU Global Survey data showed that the highest-ranked internal driver of internationalisation was President / Rector / Vice-Chancellor / Chief Academic Officer, with 46 % of all institutions ranking this group as key internal driver (rank 1).

When looking at who is responsible for internationalisation, it is striking that the body most commonly responsible for the internationalisation strategy according to the EAIE study is the board or central management of an institution, with 46% of the sample indicating this as being the case. Almost a fifth of the EAIE Barometer respondents report that the main responsibility for the internationalisation strategy rests with the head of the international office, which position thus ranks second. The IAU survey results, on the other hand, showed that at the aggregate level, 37 % of respondents indicated that a person at the level of head of institution (President / Rector / Vice-Chancellor) had the main strategic responsibility for internationalisation, followed by 31 % indicating that the person responsible was at the level of deputy head of institution (Vice-President / Vice-Rector / Deputy Vice-Chancellor). Analysis of the EAIE results shows that across Europe there are some variations between countries, with on the one hand, less than one third of the respondents choosing the option board or central management as the entity responsible in Georgia, Bulgaria, Ukraine and Ireland, whereas more than two thirds of respondents did so in Norway and Lithuania. The same applies to the head of international office, with large variations between the European countries— more than 40 % of respondents from Belgium (French), Georgia, Bulgaria and Ukraine choosing the deputy head of the institution, compared to less than 10 % of respondents in Spain, Norway, the Netherlands and Croatia.

Figure 6: Who has the main responsibility for the internationalisation strategy within your institution? (EAIE Barometer) EHEA average
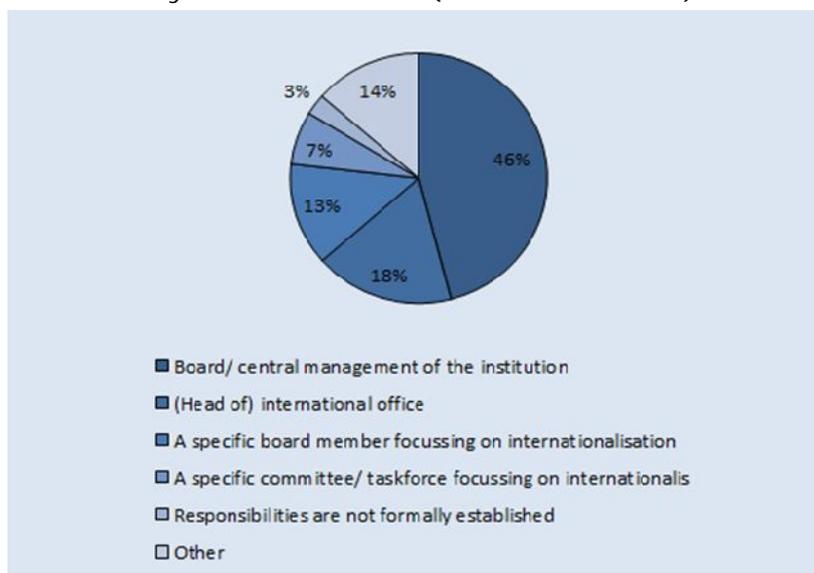
2.6.2. External drivers

In general terms, there is a high level of global agreement with regard to the external drivers for internationalisation according to the results of the IAU Global Survey. In Europe, as in all regions apart from North America, respondents rank Government policy (national/state province/municipal) as either the most significant or the second most significant external driver advancing internationalisation. Also, with the exception of North America, all regions saw National and international rankings as being an important external

driver, thus confirming the strength of the influence being exerted by the various international university rankings.

Yet there are very interesting findings as well when regional results are examined and compared more closely. First, European respondents, and they alone, ranked Regional policies as the second most important external driver. Clearly this is strong evidence of the wide-ranging impact that the European Union's policies and programmes, most especially the Erasmus and Marie Curie student and researcher mobility schemes, among others, have had on internationalisation. It also shows the importance of the Bologna Process, '…which has not only transformed substance and structure of systems and institutions in the emerging European Higher Education Area, but has also led to a proliferation of agendas for greater internationalisation, both at the national and institutional levels' (Hunter, 2012, p.114). This was also underlined by the recent EUA study. When respondents to that study were questioned about how EU tools and programmes contributed to enhancing their institutions' internationalisation, the highest-ranked response was 'They provide funding for student mobility' (EUA, 2013, p.13).

It is too early to see the impact in these survey results of the most recent European Commission (EC) Communication, entitled European Higher Education in the World (issued in July 2013), which sets the agenda for internationalisation of higher education most particularly beyond intra-European cooperation. This will be particularly important to monitor once it becomes policy and is translated into programmes that will also influence the process. The Communication clearly indicates that it aims to help universities and Member States to develop strategies, including comprehensive internationalisation strategies, which will contribute to achieving the goals of Europe's 2020 strategy (EC, 2013). The Communication sets the time-frame as 2014-2020, proposes mechanisms and makes funding commitments, rather than focusing strictly on policy issues. Yet by choosing certain priority mechanisms, such as mobility for up to 15 000 non-EU researchers to pursue their careers in Europe, or supporting up to 1 000 capacity-building partnerships (EC 2013, p. 11), it clearly sets strategic directions that are likely to be adopted by HEIs in dire need of financial support for internationalisation. How this may change institutional policy will have to be examined in future surveys.

Finally, the fact that European respondents in the IAU Global Survey are the only ones who place regional policy among the three top-ranked external drivers is both a sign of strong European regional policy and a sign of the continuing lack of such an effective regional policy in all other regions of the world. It is also interesting to note that European respondent institutions were the only ones that did not indicate Business and industry demand as being one of the top three external drivers of internationalisation.

The EAIE Barometer study asked a slightly different question: it asked respondents to rank which policy level (EU, national, regional, institutional) had the biggest influence on the internationalisation policy at their institution. By some margin, the strongest influence was reportedly coming from the institution's own policy. Although there is no equivalent question in the IAU study, the EAIE results are congruent with the IAU findings, as they show that the second-most influential level is national policy, which was also seen as the key external driver of internationalisation for European respondents to the IAU study.

Furthermore, the EAIE Barometer strengthens the findings of the IAU study as regards the influence of the EU policy level on internationalisation in Europe. The Barometer respondents considered the EU policy level almost as influential as the national policy level

while the regional (sub-national policy level) was clearly seen as the least influential. (See Figure 8 below).

The influence of the EU level varied across the region as a whole, as well as within the 28 countries of the European Union (EU28) according to the EAIE study:

- All non-EU Member States surveyed, except for Turkey and Norway (Albania, Georgia, the Russian Federation, Switzerland, and Ukraine) see the EU level as equally influential as, or less influential than, did the respondents from the EU28.
- Turkey views EU policy level as significantly more influential.
- Among EU28 countries, the EU level is seen as strongly influential in Belgium (both French and Flemish), Bulgaria, Croatia, Cyprus and Lithuania.
- It is viewed as least influential in the UK, Ireland and Denmark.

In some of the countries, the EU level seems to complement less influential policies on the national and institutional level. However, this appears not to be the case in several of the countries studied. A more in-depth study of the influence of the EU policy level on international education across the region is hence called for. In interpreting the results, it is worth bearing in mind that the EAIE Barometer survey was completed in spring 2014, at the time of the launch of the EU's new flagship programme for education, Erasmus+. The full impact of the new programme is therefore unlikely to be seen in these results.

Figure 7: How influential are the following policy levels on the internationalisation policy of your institution? – EAIE Barometer (n=1476)
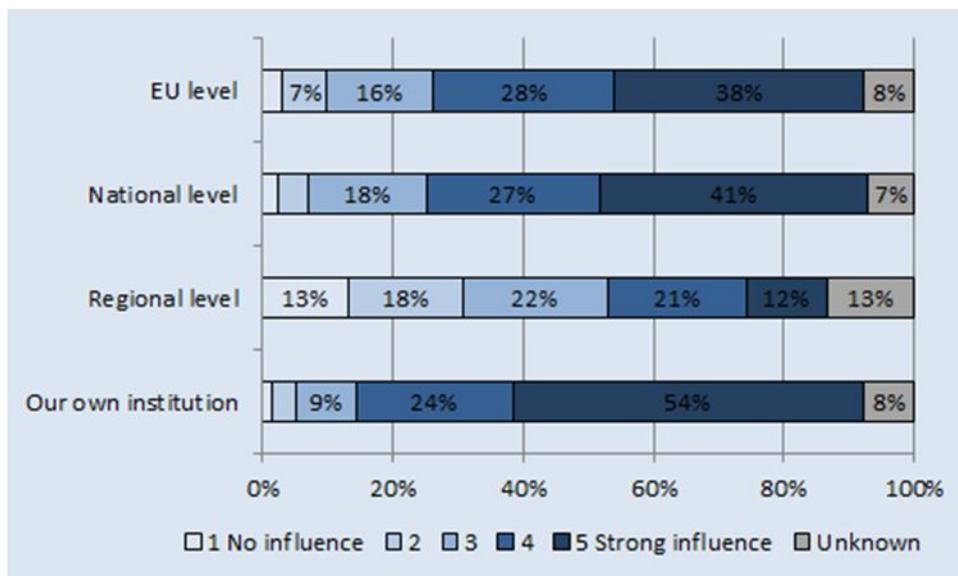
2.7. Values and principles referenced in internationalisation policy/strategy

The IAU Global Survey was conducted in the wake of an initiative undertaken by this Association, which became known as 'Re-thinking Internationalisation'. The purpose of that initiative was to reflect on and build consensus about the important values and principles that (should) underpin internationalisation strategies and activities. The resulting IAU policy statement, entitled Affirming Academic Values in Internationalisation of Higher Education: A

Call for Action, spells out some of these fundamental values and principles. The IAU Global Survey therefore also sought to find out the extent to which the different values or principles outlined in the Call for Action are to be found in or are being taken into consideration in institutional policies.

At the aggregated level, the results show that in their institutional internationalisation policies or strategies, more than half of the respondent institutions make reference to:

- academic goals as central in the internationalisation efforts
- shared benefits, respect and fairness as the basis for international partnerships
- equity in access to internationalisation opportunities

The European results show a very similar pattern. Yet in other regions we can note some interesting findings. For example, respondents both in Africa and in the Middle East noted Scientific integrity and research ethics as among the three values and principles most often mentioned in their policies, in stark contrast to all other world regions. What is not identified among the top three values may also be underlined, including: shared decision-making, rights of international students and scholars, and safeguarding and promoting cultural and linguistic diversity.

2.8. Risks and challenges of internationalisation

2.8.1. Institutional risks

Among the reasons for the recent discussions about the values that should underpin internationalisation is the persistent identification of significant risks and expressions of concern about some aspects of global trends, which have been voiced by institutions in developing countries in particular. The IAU Global Surveys have always sought to identify both the benefits and the risks of this process and the most recent survey was no exception.

First of all, as seen in Figure 9, at the global level respondents identify the following three institutional risks of internationalisation: International opportunities being accessible only to students with financial resources, Difficulty regulating locally the quality of foreign programmes and Excessive competition among HEIs.

Table 2: The three top-ranked potential risks to institutions associated with internationalisation: regional results

	Global	Africa	Asia and Pacific	Europe	Latin America and Caribbean	Middle East	North America
International opportunities accessible only to students with financial resources	1	1	1	2	1	1	1
Difficulty regulating locally the quality of foreign programmes offered	2	3		1	2		
Excessive competition among higher education institutions	3		2 =	3			3
Over-emphasis on internationalisation at the expense of other priorities of importance for staff and students			2 =			3	
Pursuit of international partnerships/policies only for reasons of prestige			3		3		
Brain drain		2				2	
Too much focus on recruitment of fee-paying international students							2
Over-use of English as a medium of instruction							
Homogenisation of curriculum							
Reputational risk derived from our institution's offshore activity							
Other							

Looking at the regional differences in the results of the IAU Global Survey and starting with Europe, we note that European institutions selected Difficulty regulating locally the quality of foreign programmes as the most significant risk. This is somewhat confusing, since the number of foreign programmes offered in Europe is not high. The respondents may have interpreted this as referring to issues of recognition and credit transfer for study periods undertaken abroad. If this is the case, this result is interesting on two accounts. First, given the large number of intra-regional inter-institutional collaboration initiatives, student exchanges, joint degrees etc. already in place among European institutions, it might be expected that concerns with recognition would be diminishing. Second, in light of the EU policy of promoting and encouraging increased internationalisation of higher education (beyond intra-European cooperation), the fact that many see the issue of the quality of programmes offered elsewhere as a major risk raises the question of their readiness and willingness to extend their international networks and collaborations beyond the well-

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trodden paths of current intra-European links. It seems quite clear from these results that the issues linked to recognition of periods of study taken elsewhere remain a serious concern for institutions worldwide, including in Europe, a finding that echoes that of the 4th Global Survey as well as the more recent EUA study.

It is also worth noting that Brain drain continues to be seen as an important risk for institutions in Africa and the Middle East (ranked second in both regions), but is not noted as particularly significant in any other world region. Similarly, the Pursuit of international partnerships/policies only for reason of prestige is noted as the third most significant risk by institutions in Asia and Pacific and in Latin America and the Caribbean, but is not seen as a particularly significant risk in Europe or in any other world region. Also, only respondents in Asia and Pacific and in the Middle East indicated that Over-emphasis on internationalisation at the expense of other priorities of importance for staff and students is one of the three most significant risks of internationalisation to their institution.

Given the fact that institutions in the United States and Canada have long been among the top destinations for incoming international students, it is interesting to note that North American respondents were the only ones who selected Too much focus on recruitment of fee-paying international students as the second most significant potential institutional risk of internationalisation. Institutions in no other world region selected this among their top three risks. As increasing competition for degree-seeking international students heats up, the pressure on North American HEIs has grown. At the same time, having effortlessly attracted the largest numbers of international students in the past, American institutions in particular have grown quite dependent on international student enrolments in certain graduate programmes. This too leads to more recruitment efforts, which may seem to overshadow other internationalisation activities.

2.8.2. Challenges

The EAIE study did not ask its respondents to identify institutional risks; instead it asked respondents a personal question about what key challenges they faced in their daily work on internationalisation. The results show that their main challenge is Improving international strategic partnerships followed by Increasing outgoing student mobility (excluding PhD students). Given that the IAU study showed that European respondents saw International opportunities accessible only to students with financial resources as a high risk, it is clear that those working in the field of internationalisation in European HEIs are required to expend a great deal of effort and resources to overcome the barriers to international mobility, including outbound student mobility. This is particularly important as this remains a key priority activity of institutional and regional internationalisation policies in Europe, as underlined by the results of the two surveys.

2.9. Geographic priorities for internationalisation

Institutional internationalisation strategies or policies may focus on a large number of dimensions and set priorities according to institutional functions – for example, prioritising research over teaching. In addition, they might place more emphasis on a specific level of education, either undergraduate or postgraduate. Among the possible priorities, countries or regions of the world where institutions wish to develop more collaboration are also frequently identified in institutional strategies.

The 4th edition of the IAU Global Survey posed questions specifically with regard to geographic priorities for the strategy, as well as asking about priority activities undertaken by institutions. The EAIE Barometer study also asked the respondents to indicate the most

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important geographic regions with which they were seeking to develop international strategic partnerships.

Figure 10 presents the top three geographic priorities identified by those respondent institutions to the IAU survey that confirm having identified geographic priorities for their internationalisation (60 % of the total).

Figure 8: Top three ranked geographic regions for internationalisation – IAU Global Survey (n=798)
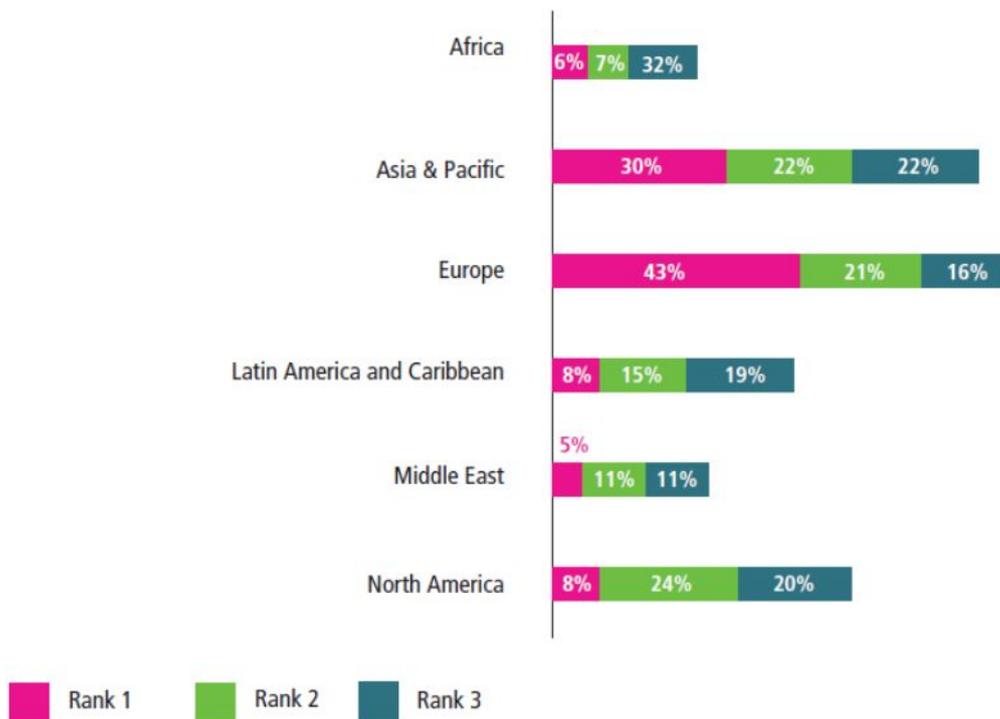
These aggregate results show that Europe is the geographic priority overall, followed quite closely by Asia and Pacific and then North America. This is the case whether we look at the top-ranked region or the combined results of all three top-ranked regions. However, it is difficult to confirm that Europe is truly the most popular region for internationalisation activities by looking only at the global/aggregate results since European institutions represent such a large proportion of the respondents in the IAU Global Survey. Only by disaggregating the responses, as shown in Figure 11, can a more accurate depiction of the priority target regions for institutional policies be drawn.

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Table 3: Three top-ranked regional priorities for internationalisation – IAU 4th
           Global Survey (n=798)

		Region of respondents					
		AFRICA	ASIA AND PACIFIC	EUROPE	LATIN AMERICA AND CARIBBEAN	MIDDLE EAST	NORTH AMERICA
Geographic priority region	Africa	1					
	Asia and Pacific	3	1	2	3		1
	Europe	2	2	1	1 =	1	3
	Latin America and the Caribbean				2		2
	Middle East					3	
	North America	3	3	3	1 =	2	

The results in Figure 11 show, as in previous IAU surveys, that an intra-regional focus continues to predominate in three of the regions (Europe, Africa, and Asia and Pacific), and that Europe is of high importance to almost all other regions.

These results are echoed by the results of the EAIE Barometer study where the respondents chose the 28 countries in the EU as the most important region for their institutional strategic partnerships, followed by Asia and North America. In the EAIE study the predominance of Europe is uncontested, with almost twice as many respondents choosing Europe as those selecting Asia as the most important region.

Figure 9: What do you consider the most important regions in the world in which
           your institution has partnerships (choose maximum 3 options)? – EAIE
           Barometer

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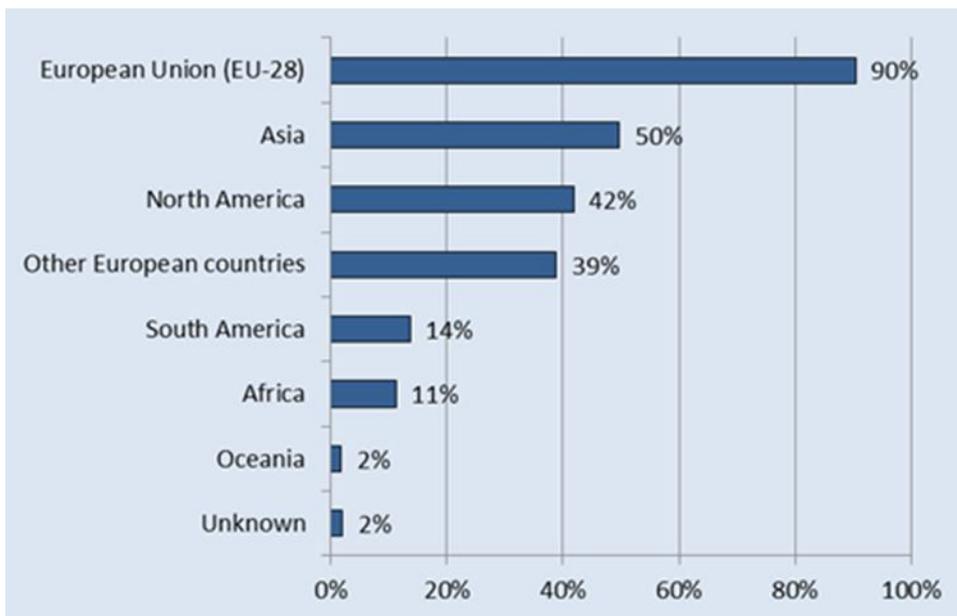
2.10. Priority internationalisation activities and funding

As outlined above, a vast majority of the European respondents surveyed indicated that their institution either has an internationalisation strategy in place or that internationalisation is part of the overall institutional strategy. Thus internationalisation is on the agenda of most European HEIs. What these strategies contain, what activities are pursued and how they are financed will be covered below to paint a fuller picture of internationalisation in Europe today.

2.11. Priority activities

Both the IAU and EAIE surveys asked respondents to identify the priority internationalisation activities undertaken at their institution. The results are quite similar. Between the two surveys, in the order of priority they are:

- outgoing mobility (first in both surveys)
- incoming student priority (second in EAIE)
- international research collaboration/innovation (second in IAU)
- strategic partnerships (third in EAIE)
- strengthening international/intercultural curriculum (third in IAU)

To place these reported priority activities in perspective and offer insights on the developments over time the EAIE study included a question which asked respondents to rank, from a list of 15, which internationalisation activities they felt had increased over the past three years and which had decreased. An analysis of these results shows that the activities that have seen the largest increase (taking into account the answering options 'substantial increase' and 'increase') are: Number of international strategic partnerships with foreign institutions; [Attention to the] Quality of services for international students and Implementation of international strategic partnership agreements, followed by Incoming and outgoing student mobility and exchanges. The two studies show that student mobility is becoming an even more important aspect of internationalisation for European institutions, and that development of strategic international partnerships to undertake projects including international research collaboration is now also a central focus for those working on internationalisation in Europe.

2.11.1. Funding of internationalisation

In spite of the growing importance of internationalisation, it will have little impact if the process is not adequately funded. To implement a full range of internationalisation activities and achieve the various expected benefits requires resources – both human and financial. This is especially the case when a strong focus on mobility is viewed as the centrepiece of internationalisation and when access to international opportunities for all students is a key value, as was reported by respondents in the IAU 4th Global Survey.

The majority of respondents to the IAU study (53 %) report that the single largest funding source for the implementation of internationalisation is their General institutional budget. The second largest single source of support appears to be External public funds, noted by just under a quarter of the respondents. At the other end of the spectrum, funds from international organisations, foundations, and funds generated from international activities were not identified by many as important sources of funding, and Funds generated from international student fees, although in the third-highest place, were reported as the largest (ranked first) single source of funding by a very small group of respondents.

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A more detailed look to see where institutions may be investing more financial resources and examination of these trends by region provides an interesting picture. The highlighted areas in Figure 13 below show those activities for which more than 50 % of the respondents report that they saw increased funding. First of all, at the aggregate level, only two areas have seen increased funding. These are international research collaboration and outgoing mobility for students. These are also the only two areas where European institutions report increased funds. In contrast to this, it is worth pointing out that in other regions, investments are made elsewhere. In North America it is on recruitment of undergraduate fee-paying students, in the Middle East funding increased in many areas, including in marketing, outgoing faculty mobility opportunities and others. African institutions show the second-highest number of areas where funding increased: international capacity-building projects, for example, join their list of activities to see increased funds.

In a general fashion, it can also be underlined that institutions in Europe and in North America appear to focus their internationalisation activity quite narrowly, if one is to judge by their funding, with only two areas seeing an increase in each case.

Table 4: Internationalisation activities for which funding has increased in past three years - IAU 4th Global Survey

	Global	Africa	Asia and Pacific	Europe	Latin America and Caribbean	Middle East	North America
Strengthening international/intercultural content of curriculum						x	
International research collaboration	x	x	x	x	x	x	
Outgoing mobility opportunities for students	x	X	x	x	x	x	x
Outgoing mobility opportunities for faculty/staff		X			x	x	
Bi- or multilateral international student exchanges			x		x	x	
Recruiting fee-paying international undergraduate students							x
Recruiting fee-paying international post-graduate students							
Marketing and promoting our institution internationally		X	x			x	
Offshore provision of education							
Delivery of distance, online and/or e-learning education							
Developing joint and double/dual degree programmes							
International development and capacity building projects		x				x	

2.12. Conclusions: Internationalisation as a key policy focus

The data presented and analysed in this chapter gives only a brief overview of the wide range of data, analysis and information about internationalisation that is available as a result of the IAU 4th Global Survey and the EAIE Barometer. It is important to bear in mind when comparing the results of the two surveys that they had a slightly different focus –

institutional and individual respectively - and for this reason they addressed and collected responses from different groups: institutional leadership in the case of the IAU study, and the SIOs and other professionals working within the institutions in the case of the EAIE Barometer. Nevertheless, by comparing the results of the two surveys it is possible to discern certain trends in the ways institutions in Europe act on and perceive internationalisation of higher education.

For example, both studies show that for European institutions and the people who work in them:

- the key benefits /reasons for pursuing internationalisation are seen as the improvement of the quality of teaching and learning and preparing students to live and work in a globalised world;
- national-level policy is a key external driver/influencer of institutional policy on internationalisation;
- increasing international (and especially outbound) student mobility is a key policy focus within institutional internationalisation policies, has risen in importance within the region and is now more than ever a central challenge for those working on internationalisation; and
- as well as international student mobility, international research collaboration and international strategic partnerships are important priority internationalisation activities undertaken by European institutions.

At the same time, there are some divergences between the results of the two surveys which are worth underlining. Perhaps the most significant concerns the presence of an internationalisation policy in respondent institutions in Europe. The data collected in the IAU survey from European respondents showed that 61 % had a specific internationalisation strategy in place. However, only 38 % of respondents to the EAIE study indicated that this was the case. In contrast, 46 % of respondents to the EAIE Barometer indicated that although they did not have a specific strategy, internationalisation was part of the overall institutional strategy, compared to only 15 % indicating this in the IAU 4th Global Survey. This discrepancy may be explained by the different institutional composition of the European sample in the two surveys. But, whichever way one understands these rather different findings, it is clear from these figures that, in both surveys, for approximately 80 % of the respondents in Europe, internationalisation is an important policy focus.

The combined results of the two studies draw a highly encouraging picture of internationalisation in Europe. This is evidenced by the very fact that representatives of so many institutions in the region took the time to complete the two surveys. Also, the IAU survey showed that Europe is by some margin the region most often prioritised in institutional internationalisation activities in other parts of the world. What these surveys do not show, however, is whether these trends are likely to persist into the future, or if technological and socio-cultural innovations are likely to change the trajectory of internationalisation within Europe once again. Certainly, regional developments will vary around the globe, and while Europe remains in the lead in terms of policy development and support for the implementation of internationalisation, particularly through mobility schemes, regional collaboration and economic developments in other parts of the world are changing the landscape, including in internationalisation. Monitoring and understanding these changes is a key challenge for institutional and regional policy-makers in Europe and around the world, so that they can make the best choices about their institutional strategies and ensure that internationalisation and related activities serve the pursuit of their wider goals.

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3. DIGITAL LEARNING, MOBILITY AND INTERNATIONALISATION IN EUROPEAN HIGHER EDUCATION

William Lawton[9]

3.1. Introduction

There can be little doubt that the MOOC revolution of 2012 not only injected new vitality into the various discourses on digital teaching and learning, but continues to enhance the perceived legitimacy of online learning around the world. Within Europe, the digital discourse has frequently referred to the potential of virtual mobility to realise the vision of European integration. To the extent that it permits access to higher education for new constituencies of learners who otherwise would be excluded, the digital revolution is a good thing. To the extent that it institutionalises two-tier (elite vs. mass) higher education systems globally, it is less desirable. The digital revolution expresses both of these tendencies at once.

Digital learning, by which is meant 'learning facilitated by technology that gives students some element of control over time, place, path and/or pace',[10] is not new: universities started making courses and degrees available online for their own students in the 1990s. Students now routinely use customised 'virtual learning environment' (VLE) platforms for receiving course materials, viewing lecture podcasts, submitting assignments, and communicating with staff and other students. This can be done 24 hours a day, on and off campus, and the belief that VLEs enhance student engagement and learning is backed by some evidence (Morris, 2011).

While physical mobility has been a key component of the European integration project, virtual mobility has been a key component in the internationalisation of digital learning. A widely reproduced definition of virtual mobility, from the former eLearningeuropa.info portal, is 'The use of information and communication technologies (ICT) to obtain the same benefits as one would have with physical mobility but without the need to travel' (e.g. EuroPACE 2006, p. 5). This is an almost circular definition, as it is far from an established fact that virtual mobility delivers the 'same benefits' as physical mobility. It is therefore best read as an intent or aspiration of virtual mobility rather than as a fait accompli. A less presumptuous definition is 'a set of ICT-supported activities that realise international collaborative experiences in a context of teaching and/or learning' (Vriens, 2010).

With a couple of notable exceptions, the role of European higher education institutions (HEIs) in the digital disruption of education has been modest and sporadic. The Universitat Oberta de Catalunya (UOC) was a true pioneer and has offered 100 % online degrees since 1995. The University of Tübingen may have started the OpenCourseWare movement by publishing videos of lectures online in 1999 – three years before MIT.

At EU level there have been numerous initiatives on the digital revolution. A Virtual University for Europe (VirtUE) feasibility project was funded by the European Commission from 1996 until 1998. A Collaborative European Virtual University (cEVU) was funded from 2001 to 2003 by the Commission under an 'eLearning' initiative based on collaboration

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[9]   The author wishes to thank Dr Don Olcott at Charles Sturt University, John Zvereff at Universitat Oberta de Catalunya, and two anonymous reviewers for their helpful feedback on a draft of this chapter.

[10]   Taken from digitallearningnow.com/education-in-the-digital-age/glossary.

between existing European university networks.[11] It saw ICT in education as a strategic European issue in higher education development, but it's only apparent output was a manual and nascent business plan for a virtual university. A recent initiative to 'bring the digital revolution into education' is Opening up Education, discussed later in this section.

3.2. Bologna, EHEA and mobility

The promotion of intra-European physical mobility of students and academic staff was a core objective in the creation of the European Higher Education Area (EHEA) and was one of the six core objectives of the intergovernmental Bologna Declaration of 1999 – 12 years after the start of the Erasmus programme, itself the core vehicle for student and staff mobility.[12]

Neither digital learning nor distance education nor virtual mobility were formally part of the Bologna Process or creation of the EHEA. Since the dotcom boom at the turn of the century, the digital landscape developed separately and in parallel with the European integration project. Even so, almost from the start of the Bologna Process, virtual universities and virtual mobility were seen – at least by some – as a means not only of internationalising studies at European universities, but also 'for realising the ambitions of mobility within Europe expressed in the Bologna Declaration' (cEVU, 2004, p. 9).

A 'best-practice manual' on virtual mobility in 2006 described a number of unrelated experiments across Europe (mostly funded by the former Socrates programme) and noted that because virtual mobility was a recent phenomenon, its drawbacks were mainly organisational (EuroPACE, 2006). Another paper noted that few European virtual mobility initiatives had attained a level of sustainability at that time (Schreurs, Michielsens, Verjans, and van Petegem, n.d.). It was 'recommended that arrangements for virtual mobility should be as close as possible to those for physical Erasmus, specifically when it comes to agreements, credit transfer, fees and access to technology' (EuroPACE, 2006, p. 6).

3.3. Beyond mobility

After the Bologna Declaration, physical mobility featured in subsequent ministerial communiqués from 2001 to 2009. It likewise features in the Commission's 'Europe 2020' strategy of March 2010 (European Commission, 2010, p. 11) and its July 2013 communiqué on 'European higher education in the world' (European Commission, 2013a).

But it is apparent that such mobility is no longer seen as enough. The last of the above documents notes that 'internationalisation is a rising phenomenon with a global dimension: beyond the intra-EU cooperation and mobility' (European Commission, 2013a, p. 2). It complains that while 'several member states and many HEIs' do have higher education internationalisation strategies in place, they are too occupied with student mobility and are fragmented rather than 'linked to an institutional or national strategy'.

The Commission's recommendation for both states and HEIs in response to this new environment is a 'comprehensive internationalisation strategy': in addition to mobility beyond Europe, comprehensive internationalisation includes cooperation and partnerships,

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[11]   See 'Researching Virtual Initiatives in Education', virtualcampuses.eu/index.php/Collaborative_European_Virtual_University. The cEVU produced a Manual for a Collaborative European Virtual University – see cEVU (2004).

[12]   The text of the Bologna Declaration is at www.ond.vlaanderen.be/hogeronderwijs/bologna/documents/MDC/BOLOGNA_DECLARATION1.pdf

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and 'the internationalisation and improvement of curricula and digital learning' (European Commission, 2013a, p. 4).

This was echoed by the outgoing European Commissioner for Education, Culture, Multilingualism and Youth, Androulla Vassiliou. She said that 'Europeans need… a shift in the institutional mindset. It is no longer enough simply to encourage students to study abroad'.

She continued:

> 'Universities need to have comprehensive strategies that go beyond mobility and encompass many other types of academic cooperation such as joint degrees, support for capacity-building, joint research projects and distance learning programmes. And they need to prepare for "internationalisation at home", for those 80-90 % of students who will not be mobile'. (European Commission, 2013b).

The Erasmus programme has had 3 million participants since 1987, with 270 000 in 2012-13 alone. A recent impact study gives the programme high marks for future employability, inclusiveness, and helping to internationalise HEIs (European Commission, 2014). But looked at another way, only 2.3 % of European students pursued studies in another European country in 2000; this is about the global average for mobility.[13] A 'position paper' on 'virtual exchange' in the EHEA noted, critically, that this had increased to only 4.5 % by 2014. It pointed out that even if the European objective of 20 % mobility were achieved by 2020, 80 % would be left 'without an international, intercultural experience' (UNICollaboration, 2014). It called for a 'coherent strategy on virtual exchange' in order to consolidate resources and encourage it as a mainstream practice. By way of contrast, the Commission's Europe 2020 strategy articulated its mobility and digital initiatives separately, as 'Youth on the move' and a 'Digital agenda for Europe'.

3.4.   The digital divide

The position paper also noted a 'new digital divide between those who have access to innovative, technology-based education and those who do not'. In 2014, 78 % of EU households had broadband at home – up from 42 % in 2007 (Eurostat, 2014). This average masks persistent geographical gaps – between northern and western countries, on the one hand, and southern and eastern countries, on the other. Broadband penetration ranged from 87-88 % in the Nordic countries and the UK to 62 % in Portugal and 54 % in Bulgaria. It was 95 % in non-member Iceland and 46 % in non-member Turkey in 2013.

Also in 2013, a survey of usage of, and attitudes toward, ICT in schools across Europe found that 63 % of nine-year-olds attend schools which lack appropriate digital equipment and fast broadband, and that up to 80 % of students in some countries never use digital textbooks, broadcasts or podcasts, simulations or learning games (European Commission, 2013c). The big mismatch between broadband penetration at home and prevalence of ICT usage in school is most curious. Ireland has the highest usage of ICT in school and only 64 % broadband penetration at home. Luxembourg and Belgium have the lowest ICT usage in school and 70 % and 79 % broadband penetration at home, respectively. At age 13-14, Portugal scores highest for ICT usage in school, and Turkey is second. The survey concluded that there was a 'lack of critical mass of quality educational content' and failure to keep pace with the revolution in digital technology (European Commission, 2013d).

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[13]   Between 2005 and 2011, 2% of higher education students in the world studied outside their home countries. See Ghemawat and Altman (2013), p. 73.

When one also considers that 49 % of EU citizens have poor computer skills or none, it is hardly surprising to learn that more than half of EU countries reduced their investment in education and training between 2008 and 2011 (European Parliamentary Research Service, 2014).

3.5.   'Opening up Education'

'Opening up Education', launched in 2013, is a direct and perhaps belated response to the digital divide, funded through Erasmus+ and the huge Horizon 2020 programme (www.openeducationeuropa.eu/en/initiative). It provides an online portal to European Open Educational Resources (OERs) in different languages in order to increase their use. It aims to increase broadband penetration in schools. It also targets the 'skills gap'. It boasts a long list of 24 actions to be undertaken; some are under way.[14] But there is a difference between actions and outcomes, and for the latter we will have to wait.

One interesting item on the openeducationeuropa.eu portal is a European MOOCs Scoreboard, which is probably the best regularly updated database of free and open European MOOCs (www.openeducationeuropa.eu/en/european_scoreboard_moocs). The cumulative (not snapshot) tally on 8 April 2015 was 1 254 MOOCs, including those not begun but accepting registrations. Spanish institutions had offered the largest number of MOOCs in Europe (348), followed by the UK (307), France (170), Germany (145) and Switzerland (81). Ireland had five. This, and the fact that only 69% of Spanish households had broadband in 2013, shows, unsurprisingly, that there is no correlation whatsoever between the distribution of European MOOCs and the geography of the digital divide.

Beyond MOOCs, the number of for-credit digital programmes is more difficult to determine. The Open Education Europa website is less helpful here: given that it indicates only four online courses from the wholly digital Universitat Oberta de Catalunya, its database is far from complete. But as even elite and MOOC-avoiding universities like Cambridge and Oxford offer individual online courses for credit through their Continuing Education institutes (103 courses from Oxford in November 2014), it is safe to assume that the majority of European institutions have some digital provision.

3.6.   The problem with virtual mobility

Complementarity between digital and traditional content, and between virtual and physical mobility, is a consistent thread in the discourse. One extends the other. The 2014 'virtual exchange' position paper proposes virtual mobility 'under the guidance of educators and/or expert facilitators' as the solution to selective physical mobility. It can provide the same positive outcomes: better foreign language competence, intercultural knowledge and critical thinking, and it reaches new constituencies.

But it can also be argued that the institutionalisation of virtual exchange institutionalises a two-tier system of mobility: one for the elite few and another for the 80-90 % who cannot afford it. Looked at this way, 'internationalisation at home' (the core element of which refers to developments in curricula consistent with the international aspirations of institutions) can be seen as a consolation prize for non-mobile non-elites. This is not what either HE institutions or EU institutions have in mind. But it may have to be acceptable, assuming that equitable access to physical mobility will never be more than an aspiration. ICT-assisted virtual mobility cannot fully compensate, because the digital divide is real and it is based on underlying social divisions.

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[14]   These are provided at europa.eu/rapid/press-release_MEMO-13-813_en.htm.

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It could be argued that this may ultimately not matter if the labour market decides that online students are not second-class. There is evidence that employers favour digital graduates for being more obviously motivated, driven, disciplined, and skilful in ICT. But there is also evidence from the US that they may be mistaken: one recent large-scale study of students taking both online and face-to-face courses found that the former had higher failure rates; another study found that online students earned lower grades and were 'less persistent' (Konnikova, 2014).

3.7. Beyond Brussels: FutureLearn, iversity and Universitat Oberta de Catalunya

While Ministers acknowledge a rapidly changing world and the Commission funds initiatives and reports, there is no shortage of innovation in digital learning across the EU. This section will briefly describe three examples: two MOOCs platforms and an online university.

Innovation can be spurred by emulation. The London-based FutureLearn MOOCs platform and the Berlin-based iversity platform were both inspired by developments in the US in 2012. FutureLearn is owned by the Open University. Its creation was driven in part by the then universities minister in the UK government, who expressed concern about the UK being 'left behind' by the explosion of digital activity in the US (Lawton, 2013). It was, as a consequence, originally conceived as a UK-branded MOOCs platform, but this approach was quickly abandoned and the consortium includes research universities in eight other countries, including the Netherlands, Norway, China and Korea. It is a for-profit company and has received no public funding.

Iversity's original life as an academic collaboration platform was achieved with more than EUR 1 million in public funding from EU structural funds and the state of Brandenburg. Its relaunch as a MOOCs platform in 2013 was done with venture capital.

FutureLearn's first eight courses began in September 2013; student numbers were originally capped at 10 000 per course. From this cohort of students, 94 % said they would recommend FL to friends, 92 % said the courses met or exceeded their expectations, and 88 % rated their courses as good or excellent. For each course, between 24 % and 45 % of students posted comments during coursework and the average number of comments per student was seven. The proportion of students discussing course content on the platform increased to an average of 38 % for the 21 courses that began in January 2014 (about.futurelearn.com/blog/updated-numbers).

Apart from actual content, the main selling point of FutureLearn (in order to articulate an offer distinct from the American platforms) is an emphasis on social-media-style interaction as a means of improving the learning experience. They aim to 'create a community of lifelong learners' and to 'remove the loneliness of distance learning' (www.futurelearn.com/about/our-principles). This is also an attempt to build – or restore – into the MOOC experience the concept of the co-creation of knowledge by students. If digital learning is a vehicle for building that kind of engagement and responsibility, it would represent a reversal of the demoralising trend, in fee-paying jurisdictions like the UK and US, towards a consumerist conceptualisation of higher education where getting 'value for money' is presumed to exhaust the aspirations of students. This would be an unexpected and welcome impact of the digital revolution. There are MOOC enthusiasts and digital doom-mongers but almost all agree that MOOCs will impact on 'traditional' higher

education, not least as they are integrated into degree programmes through the awarding of credits.

Iversity, based in Berlin, is one good example among many of business-model experimentation on MOOCs for credits. It was relaunched in 2013 as a MOOCs platform. Lazy media coverage claimed it wanted to be the Coursera of Europe but it is driven by a genuinely European mission: to use the European Credit Transfer and Accumulation System (ECTS) to transform MOOCs into credit courses. Under the ECTS standard, credits are transferable in any of the 53 countries (some beyond Europe) that have ratified the Lisbon Recognition Convention, 'regardless of whether the knowledge, skills and competences were acquired through formal, non-formal or informal learning paths' (European Commission, 2009).

Three iversity MOOCs currently offer ECTS credits for courses in maths and business administration from University of Osnabrück, Lübeck University of Applied Sciences, and RWTH Aachen. To obtain credit, the final exams must be taken in person, on campus. This is seen by iversity's founders as helping to realise the vision of mobility in the Bologna Process (Lee, 2013). CEO Hannes Klöpper thinks that once students start to clamour for recognition, it will be hard for Europe's universities to resist accrediting the best MOOCs ('The digital degree,' 2014). But like iversity, the online market for MOOCs credit is in its infancy, in Europe and beyond.

The Universitat Oberta de Catalunya in Barcelona, the first 100% online HEI in the world, is approaching its twentieth anniversary. It has consciously developed from a local institution with a global reach to a 'globally sensitive university with a commitment to internationalisation' (Zvereff, 2014). It continues to innovate: while the general run of play in cross-border mobility has seen an extension from physical to virtual, UOC went in the other direction and applied a 'flipped' model to the Erasmus programme. In 2014 it received a handful of students from Italy and Greece who came to Barcelona for the cultural experience but their studies are wholly online – virtual academic mobility, physical mobility, and a blended overall experience.

UOC has a small number of targeted partnerships with institutions in Chile, Dubai, China and Australia. In 2015 it will offer a fully online joint Executive MBA in Islamic Finance, in partnership with Hamdan Bin Mohammed Smart University (HBMSU) in Dubai, the first online university in the UAE. Students will take the first year of core courses on the UOC platform and the second year of specialised courses on the HBMSU platform.

This is part of Dubai's efforts to establish itself as the world's Islamic economy capital. It is an interesting initiative in a part of the world where online learning is either not recognised by governments or not accepted as legitimate. The international joint model should increase access to international programmes at a lower cost, and UOC appears to be fulfilling the Commission's call for a 'post-mobility' comprehensive internationalisation strategy based on digital learning.

3.8.   Looking to the future

The Observatory wrote in 2006:

> It is also questionable if the richness of an international study experience can adequately be captured in a virtual environment, particularly as many educational experiences in studying abroad arguably take place outside of the classroom. As such,

it remains to be seen to what extent virtual mobility schemes will serve to equalise access to internationalisation activities in the European Union, and how much value participating students and institutions ascribe to their virtual exchanges. (OBHE, 2006)

Although the sheer number of publicly funded initiatives makes it difficult to measure outputs against inputs, it is safe to say that access to internationalisation activities has not yet been equalised. The EHEA has achieved a higher level of student mobility than the rest of the world generally. But it is still very low – hence the consistent belief that not enough is done to bring the digital revolution to a sufficient number of families, schools, and HEIs. This is a laudably egalitarian concern: digital literacy is an asset worth aiming for. But the digital revolution is insufficient to overcome the class divides upon which inequity in mobility and access are based. Digital learning is neither replacing nor enhancing traditional mobility. It is merely supplementing it.

MOOCs are touted by many as an egalitarian innovation, as is the internet itself. But the future of higher education may be less egalitarian: the elite will still receive elite education and the majority will get something 'quick, cheap and easy' (Lawton and Lunt, 2013). The irony is that the digital revolution may merely hasten our progress toward this less egalitarian future.

On the other hand, employers will be thinking ahead. Google is already reported as having abandoned university grade scores in considering job applications because they are poor indicators of future performance (Bryant, 2013). At some point soon, employers will decide that a collection of ECTS credits or 'digital badges' acquired in different ways from different types of institutions demonstrates the possession of skills needed for a job. We are not yet at the stage in which the perceived legitimacy of a three- or four-year degree can be replicated with a buffet of online offerings. Nor does this mean that HEIs are bypassed. But the 'unbundling' of education provision from qualifications means the rise of alternative provision pathways that may have relevance for a greater diversity of students in more parts of the world. This will have disruptive effects on non-elite, mass higher education. But in the developing world, it would be a positive thing if the gaps between regional skills requirements and skills provision could be closed more easily through this route.

The internationalisation strategies of elite universities, with their emphasis on research and partnerships, are unlikely to be disturbed by these digital developments. They simply add online offerings to what they do. But for the great majority of HEIs, internationalisation is about mobility (and targets), internationalising the campus at home, and 'preparing graduates for a global market of products, services, and ideas' (Hudzik, 2011, p. 8). Innovations in digital learning impact directly on how this is achieved.

The most judicious of the digital advocates see tools like MOOCs as a potential enhancement to traditional forms of pedagogy, not as a replacement or even a successor stage in pedagogy. The future is blended. Almost all of the MOOCs experimentation points toward blended provision, but it was already happening before MOOCs mania: in autumn 2011, 32 % of US students took at least one online course (Sloan Consortium, 2012). Blended learning is a way institutions can prepare themselves for what is coming, and studies in the US and UK suggest that students prefer blended learning to solely face-to-face or solely online (e.g., Echo360, 2012). The most successful online offerings will find ways of incorporating community and social interaction, along with consistent faculty-student engagement. UOC and the FutureLearn platform are examples.

With some notable exceptions, Europe has played catch-up in the digital revolution. But it is well placed to be in the vanguard of new thinking on how the digital revolution can improve both the quality of and access to higher education.

4.   FINLAND

Markus Laitinen

4.1. Introduction

This report offers an overview of the Finnish higher education system and an analysis of its international aspects. Some statistics are provided both for the system as a whole and for the internationalisation of higher education. Among European countries, Finland has some of the best and most comprehensive data on international students, periods of study abroad and student mobility. Over the past 20 years, universities have consistently been required by the Ministry of Education and Culture to furnish this data, thus providing accurate trends of development over time. The report looks into how internationalisation efforts have evolved and how the agenda has significantly broadened in recent years. A brief discussion of current and future challenges regarding the internationalisation of higher education in Finland is also provided.

4.2. A short description of the Finnish higher education system

The Finnish higher education system is based on a dual institutional model: universities and universities of applied science or polytechnics, as they are officially known. The roots of the university system go back to the 17th century, and until 1919 there was only one university in the country. The universities of applied science are much younger, and their development began in the 1990s through mergers of formerly independent post-secondary vocational institutions. Currently there are 14 universities and 24 universities of applied science in Finland.

All 14 universities offer the full spectrum of degrees (bachelor's, master's, and doctoral) whereas the 24 universities of applied science offer only bachelor's and a limited number of master's degrees. Specific legislation governs each of the two types of institution (Finlex, 2014a, 2014b). Over the past five years, the number of universities has been reduced (from 20) through mergers of formerly independent universities, but no institutions have been closed as such. The relatively large number of institutions for a country of less than 5.5 million people exists because the geographical area is relatively large, and higher education institutions are thought to contribute to keeping the more remote areas habitable.

All universities and universities of applied science are publicly funded, and tuition fees are banned by law, for both domestic and international students, though fees for non-EU students have been periodically proposed. The funding model for Finnish universities is largely output-based, and completion of master's and doctoral degrees are key indicators. The performance contracts universities have with the Ministry specify a capped target number for these degrees.

Finnish universities underwent a fairly thorough reform in 2010 and become more autonomous from the state as a result. Staff are no longer considered civil servants and the universities own the majority of their buildings. They are all governed by a board, which appoints a Rector (Vice-Chancellor). By law, 40 % of the board must be external, but the universities also appoint these members. A review of universities of applied science is also under way.

Some 50 % of Finnish universities are comprehensive universities and the other half are institutions with a more limited academic scope (e.g. business, engineering or arts). They also differ in size, with the largest institution having more than 35 000 students and the smallest having only 2 000. The universities of applied science are more uniform in size, ranging from 2 300 to 11 000 (Vipunen, 2014a), and these institutions also offer education across a wide range of study fields.

Finland maintains relatively high enrolment in higher education, with 39 % of the population holding a tertiary qualification (OECD, 2013). Universities enrolled 166 328 students in 2013, amounting to a decrease of 8 500 students in eight years (Vipunen, 2014d), whereas the universities of applied science enrolled some 144 000 students in the same year, an increase of 12 000 over the same eight-year period (Vipunen, 2014b). Even though a 'Bologna-compatible' degree structure is in place for universities, a very large majority of students complete a master's degree in the same university as their bachelor's and few students leave university after the bachelor's degree.

According to Statistics Finland (SF), the average completion time for a master's degree at Finnish universities is 6.5 years (SF, 2014), with significant differences across fields of study. Correspondingly, the average completion time for a bachelor's degree at universities of applied science is four years. One of the major challenges in Finland is the age of university graduates, who tend to be older than in most European countries, partly due to the competitive, numerus clausus-based admission procedure, and partly due to the relatively long time students take to graduate.

The number of doctoral degrees completed at Finnish universities in 2013 was 1 724, representing an increase of 300 degrees over eight years. After the 2010 university reform many universities started to reorganise the formerly fairly unstructured doctoral education arrangements into doctoral schools and programmes. The emphasis in Finland is currently not on increasing the output, but rather on improving the quality of doctoral education and related processes.

Currently, Finnish universities employ 18 000 research and teaching staff and a little over 13 000 other staff members. The universities of applied science employ a total of 10 400 staff members, of whom 5 700 are teaching staff. In both types of higher education institution staff numbers have been slightly reduced, mostly due to funding constraints.

According to the latest statistics, 3.32 % of Finnish GDP is currently used to support research and innovation. The annual expenditure in 2013 was EUR 6.68 billion, of which approximately 69 % was by companies and 21.5 % by universities (MoEE, 2014). Although Finnish research performance is relatively good, the Academy of Finland concludes in its latest State of Scientific Research in Finland report that the gap separating the best-performing countries is widening (Nuutinen and Lehvo, 2014). One of the major conclusions of the report is that Finnish universities have not created enough of a profile for themselves, and that this makes them less competitive internationally. The report further concludes that while international co-publications have increased, the Finnish system seems to require more systematic reinforcement of international research collaboration.

Until recently, the Finnish approach to internationalisation of higher education has been somewhat contradictory. On the one hand, the Ministry of Education and Culture has called for universities and universities of applied science to create more distinct profiles for themselves. But on the other hand, the institutions have been set key performance indicators for internationalisation by the Ministry, and these indicators are uniform across

the sector. It seems that the fairly heavy-handed guidance by the Ministry, coupled with the relatively large number of institutions, has led to a 'cookie-cutter' approach to internationalisation. Universities and universities of applied science have had fairly uniform approaches to internationalisation, and only recently can one detect more differentiation.

4.3. European programmes and policies for internationalisation: an important initial stimulus

European research and education programmes and related funding have been instrumental in the development of internationalisation of higher education and research in Finland. For example, prior to 1992 when Erasmus became available in Finland, international mobility of students was not at all established and other forms of educational collaboration within the continent were extremely rare. Finland became a member of the European Community in 1995, and this not only meant full access to European funding and programmes, it also marked the onset of a change in the mindset of Finnish people and higher education institutions alike.

Subsequently, European policies, including the emphasis on mobility of students, teachers and researchers, began, rather quickly, to influence national highereducation and research policies. Already in the 1990s the Ministry of Education began to offer Finnish higher-education institutions financial incentives for increased mobility initiatives, including additional funding for Erasmus but also in the form of results-based funding. Similarly, Finland fairly rapidly adopted the basic tenets of the Bologna process and institutions began to introduce the two-tier degree structure, the European Credit Transfer System (ECTS) as well as other European-style grading scales.

However, in subsequent years the internationalisation policies of Finland and of Finnish institutions have progressed beyond simple reliance on European policies. While Erasmus+, Horizon2020 and other European instruments are still central, many parts of the Finnish HE system have adopted policies and initiatives on a more global scale. Some of the details of these changes will be described in the following pages of this report.

4.4. The national policy perspective: the Ministry of Education and Culture as key player

Initially, the internationalisation of Finnish higher education was very much driven by the Ministry of Education. Over the course of the development of Finnish higher education there have undoubtedly been institution-led collaborative research and mobility initiatives, but from the end of the 1980s and particularly during the 1990s, when higher education began to develop in a more organised and strategic way, it was the Ministry of Education which encouraged universities and subsequently, universities of applied science, to become truly active and structured in terms of internationalisation.

After each general election, the newly elected Finnish government (FG) publishes its Government Programme (FG, 2014) in which it sets out the policy agenda agreed by the legislature. Higher education and research typically appear in these programmes and on occasion internationalisation of higher education receives some attention. However, after the programme is completed, each sectoral ministry comes up with a Development Plan (MoEC, 2012), which goes into more detail and which, in the case of the Ministry of Education and Culture, typically has a section on internationalisation. The items mentioned in the Government Programme and the Development Plan are typically included in the multi-year agreements between the Ministry and the higher education institutions. In the

past two decades, themes such as increasing international mobility, the need to attract international degree-seeking students, the possibility of introducing tuition fees for international students, and the centrality of European cooperation and funding, amongst others, have been introduced through the Development Plans.

For the first time in 2008, the Ministry of Education and Culture introduced the idea of creating a more comprehensive internationalisation strategy for Finnish higher education. As mentioned earlier, many relevant issues had already been part of national higher education policies, but until that time there had not been a strategic document focused more holistically on internationalisation. The Strategy for the Internationalisation of Higher Education Institutions 2009-2015 (MoEC, 2009) was prepared in consultation with HEIs, but, as the name of the document suggests, it was nevertheless delivered in a very top-down manner.

The Strategy proposes a total of 33 measures, which are divided into the following five themes:

1. Genuinely international higher education community
2. Increasing quality and attractiveness
3. Export of expertise
4. Supporting a multicultural society
5. Global responsibility

International student mobility and exchange and increasing the number of international degree-seeking students continue to be the cornerstones of the strategy. For both of these items the strategy sets quantitative goals for the Finnish higher education system, and these goals were subsequently passed on to individual institutions in their performance contracts. The strategy did not clearly differentiate between types of institutions, setting the same type of goals for both universities and universities of applied science. It is also noticeable that internationalisation of research and teaching were only covered superficially, if at all.

National higher-education policies or strategies for internationalisation have placed relatively little emphasis on internationalisation of the curriculum, digital learning or virtual mobility. In the 2009 strategy one of the proposals was for HEIs to incorporate a module supporting internationalisation at all the degree levels offered, but beyond this, responsibility for the content of academic programmes has been left with the institutions themselves. A recent study found that Finnish HEIs have identified multiple ways in which internationalisation of the curriculum can be advanced, but that they are not employed systematically. International mobility is still seen as the most important element in driving forward the issue of internationalisation of the curriculum (Garam, 2012).

In terms of digital learning, the Finnish Virtual University was established in 2001 as a collaborative project between universities, but it ceased to exist in 2010 and never really had much of an international orientation. Digital learning in Finland is very much seen as supplementary to face-to-face teaching rather than as a replacement for it, both in terms of domestic and international teaching and learning. There are currently no signs of virtual mobility replacing physical mobility.

As the current strategic period draws to a close, it is quite interesting to note that it remains unclear whether, and if so how, the Ministry proposes to renew it or to make a final evaluation of its implementation. It is quite clear that not all proposed actions have

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been implemented nor all the goals been met, even though significant progress has been made in many areas. From the point of view of universities, it is interesting to note that in terms of strategic planning, internationalisation of research is considered to be separate from education and no attempts have really been made to combine the two. The Academy of Finland (AoF), for instance, provides strategic policy guidelines for the internationalisation of research (AoF, 2013) and for research infrastructures (AoF, 2014), but there seems to be a definite gap between these and internationalisation in general. This is curious, especially since Finnish universities, and to some extent universities of applied science, have begun to consider internationalisation more comprehensively or holistically.

On a slightly more positive note, it is worth mentioning that the indicators used by the Ministry of Education and Culture for the funding of Finnish higher education include several items related to internationalisation. For universities, their uptake of student mobility, number of international staff, output of master's and doctoral degrees by international students, international research funding and international research publications all have financial implications for the institutions. This underlines the centrality of internationalisation in national education and research policies.

When it comes to internationalisation of higher education, there is one particular item which remains open and controversial. As long ago as 2005 the Ministry proposed the introduction of tuition fees for non EU/EEA students. Mostly due to the activity of the influential and politically well-connected student organisations, this proposal was not implemented, but at the end of October 2014 the current government proposed the fees again. It remains to be seen if the relevant legislation will be changed before the next general election in April 2015. Views on whether fees would be good or bad for the internationalisation of Finnish higher education institutions are again divided.

4.5. Other key stakeholders and funding schemes for internationalisation: CIMO, cities, and regions

As mentioned earlier in this report, the Ministry of Education and Culture first took the initiative to promote the internationalisation of higher education on a large scale. The Centre for International Mobility and Cooperation (CIMO), which is attached to the Ministry, has been instrumental in implementing mobility programmes, through both European and domestic funding. The Finnish-funded schemes for international mobility and cooperation in higher education include the Higher Education Institutions Institutional Cooperation Instrument (HEI ICI) and North-South programmes geared towards cooperation with developing countries: FIRST for collaboration with north-western Russian universities, and a relatively small programme for cooperation with Asian countries. CIMO serves as the National Agency for ERASMUS+ and the Nordplus programme (please see http://www.cimo.fi/programmes/nordplus_and_other_nordic_programmes) funded by the Nordic Council of Ministers. An important aspect of CIMO's work is that it co-organises the annual national conference for international higher education administrators, and this event, which started on a very small scale, today gathers some 450-500 participants from universities, universities of applied science and various other agencies. This event is an important benchmarking and networking event and promotes the professional development of people working in the field.

Finnish higher education representatives have been very active in participating in global higher education conferences, such as EAIE, NAFSA and APAIE. This is relevant, because it represents a commitment to the further development of internationalisation by Finnish HEIs.

Cities and regions have proven to be quite important stakeholders when it comes to advancing international higher education. For universities of applied science this is perhaps very natural, since the cities and regions they are working in are often formally represented in the governance of institutions. However, cooperation and collaboration with cities and regions also have strong roots with universities. Various Finnish cities and regional authorities have been involved in significant joint projects with HEIs for the promotion of internationalisation. They have also included universities and universities of applied science in the development of their internationalisation strategies. These relations are perhaps less about funding and more about dialogue and development of services but they have nonetheless proven to be significant for both parties.

Regional cooperation has also resulted in Finnish higher education institutions creating local alliances, which range from fairly loose platforms for exchanging information to institutions developing joint services and sharing courses targeted at international students.

In addition to the stakeholders already mentioned, there are of course various foundations, government agencies such as ministries (especially the Ministry of Foreign Affairs) and the National Board of Education, embassies and related cultural centres, the Finnish Fulbright office and various Finnish foundations, which have made contributions towards the internationalisation of Finnish higher education and with which universities and universities of applied science are in constant contact.

4.6. An emerging profile for institutions in strategic planning and policy-making

Although the Finnish Ministry of Education and Culture was initially the main driving force for promoting internationalisation across the sector (see part 4), at present, individual HEIs are in the process of taking the lead strategically and in terms of policy-making. While the Ministry still sets various indicators and quantitative internationalisation goals for institutions and monitors their progress on an annual basis, universities and universities of applied science are beginning to express differentiating strategic tendencies. Student mobility and international degree-seeking students remain central to institutions, but one is able to see differences in institutional responses to issues such as participation in international networks, transnational education, recruitment of academic staff from abroad and global university rankings.

In terms of implementing internationalisation strategies and policies, Finnish HEIs are still by and large fairly similar to one another, with international offices mostly dealing with educational and student-related issues. An emerging trend, however, is to approach internationalisation more comprehensively by embedding it in the core activities (research, education and engagement) and in their support functions. This has led, in some institutions, to the dissolution of formerly independent international offices and to institutions not producing separate 'internationalisation strategies' or action plans. The thinking behind this rests on the belief that internationalisation is less of a sector in its own right, but rather a feature of everything that the institution does.

There are certain commonalities when it comes to putting the institutional internationalisation policies into practice among Finnish higher education institutions. From a very early stage, substantial emphasis has been laid on offering courses taught through English. Initially individual courses were set up to cater for the needs of incoming exchange students, but over the past ten years full degree programmes in English have been established. For universities, these are offered mostly at the master's and doctoral levels,

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whereas the universities of applied science focus on bachelor's level programmes. From an institutional point of view, establishing English-taught courses and programmes has taken precedence over internationalising the curriculum, i.e. developing the content of academic programmes, as the latter has been seen as the responsibility of academic departments and even individual academics.

In implementing student exchange and mobility, the focus for Finnish institutions is very much on term or year-long exchanges. This is largely due to the results-based funding scheme introduced by the Ministry of Education in the 1990s, as, in order to count, an exchange period had to be a minimum of three months in duration. Even today, Finnish higher education institutions are less keen to develop short-term opportunities for their students than many of their European counterparts. As international student exchange has in many ways been considered central to internationalisation of the Finnish higher education system, many institutions have also offered travel grants for their students in addition to those provided by European or Nordic funding, as well as other extra-European exchange scholarships. These grants are in addition to the portable financial aid Finnish students have access to.

As already referred to earlier in this report, Finnish universities have traditionally relied fairly heavily on the Ministry of Education and Culture for strategic direction in the internationalisation of higher education. Although by no means autonomous or fully independent, universities and universities of applied science have been given more room for manoeuvre in this respect, particularly following university reform in 2010. The challenge, therefore, is for individual institutions to align their internationalisation activities with their own strategies and not rely solely on ministerial guidance.

4.7. Key performance indicators: Finnish internationalisation by the numbers

Finland is a country in which detailed statistics on the internationalisation of higher education are readily available and have been collected for a number of years. This is especially the case for student mobility and study abroad, as the Centre for International Mobility (CIMO) collects related data at the national level and on an annual basis, and since the uptake of mobility has financial consequences for institutions, the coverage of data is generally very good. CIMO also analyses data for degree-seeking international students and produces related reports and statistical analyses (CIMO, 2014a).

4.7.1. Student mobility and study abroad

We have already referred to the fact that Finnish universities and universities of applied science are set targets to achieve in terms of volume (incoming and outgoing student numbers combined) of international student exchange and mobility. In the early days, in the 1990s, the number of outgoing students grew very rapidly, but with the introduction of courses in English and the promotion of related services, the number of incoming students began to increase, to the extent that today the number of incoming students exceeds those going out (CIMO, 2014a).

In 2013 the overall number of outbound students from HEIs was 10 189, representing a 35 % increase compared to 2003 (7 555), whereas the number of incoming students was 9 739, up 47 % from 2003. Both numbers are record highs, but in the case of outgoing students the figures have remained fairly stable since 2010. Approximately 25 % of university students participate in student mobility, but only 16 % of the students in

universities of applied science do so. In terms of fields of study there are still very big differences in the uptake of student exchange, with areas such as economics and business, law, humanities and social sciences dominating. For the sake of international comparability, it is worth noting that these figures only include mobility periods of no less than three months and refer only to students enrolled in bachelor's or master's level degree programmes.

Erasmus represents 53 % of all student mobility, followed by HEIs' non-Erasmus bilateral agreements (20 %), Freemovers (13 %) and Nordplus (5 %). As a result, Europe obviously dominates, with 6 693 Finnish students going to a European destination (65 % of the outgoing total) and 7 795 European students coming to Finland (80 % of the incoming total). The popularity of Asia both as a destination and as a source country has increased significantly. The numbers of incoming students have more than tripled in ten years and the number of outgoing students more than doubled in the same time. The largest target countries in student exchange are Germany, Spain, UK, Sweden and France while Finnish students' most popular destinations of choice are Germany, France, Spain, Italy and Russia.

To foster international student exchange, some institutions have made or are in the process of making participation mandatory, or virtually obligatory. It is worth noting that in student exchange and study abroad female students are markedly over-represented.

4.7.2. Degree-seeking international students

Finnish higher education institutions, and in particular universities, have a fairly long history of enrolling degree-seeking international students. However, in the past this was done in a very unstructured way, and only in the past ten years, since the establishment of fully English-taught master's and doctoral programmes in universities and bachelor's programmes in universities of applied science, has there been significant quantitative and qualitative development.

Currently there are some 20 000 international students enrolled in Finland, and that number is almost equally split between universities and universities of applied science. In ten years the number of students has more than doubled, compared with 7 900 in 2003. The proportion of international students with respect to the total student population is 6.1 % at universities and 6.9 % at universities of applied science. Again, this proportion has more than doubled in ten years. It should be noted that there are significant differences across fields of study, with engineering having by far the most students, both in terms of numbers and also proportionally, and approximately 30 % of current students are international. In areas such as pharmacy, veterinary medicine, theatre, psychology, sports and law the proportion of international students is less than 1 % (CIMO, 2014a).

International students from Europe represent around 40.5 % of the total number of international students, just behind Asia (41 %), but far ahead of Africa (12.8 %), North America (3.8 %) and Latin America (2.4 %). It is worth mentioning that when it comes to African students, the universities of applied science have a significantly bigger proportion (16.6 %) compared to universities (9 %). In terms of nationalities, Russian students are the largest group with 2,800 students, followed by China (2 150), Vietnam (1 378), Nepal (1 180) and Estonia (817). There are significant differences between institutions when it comes to the spread of nationalities, and the numbers of Chinese students, for example, have recently exceeded the number of Russians in a number of universities.

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For universities the number of international students is split between doctoral (3 000), master's (5 500) and bachelor's (855), the latter group studying mainly in Finnish or Swedish. Again, there are institutional differences, and at the University of Helsinki, for instance, there are almost the same number of students at master's and doctoral levels.

4.7.3.   Teaching through English and joint degrees

The Ministry of Education and Culture has gathered data from Finnish HEIs both for courses offered in English and credits earned in English-taught courses. In reality, these statistics have proven to be very unreliable and details are therefore not offered here. It is, however, safe to say that both figures have risen rapidly, and this can also be gathered from the increasing numbers of international students and incoming exchange students. Data in respect of joint degrees is not collated at national level, but Finnish institutions, especially universities, have been fairly cautious about undertaking double or joint degrees.

4.7.4.   International staff

The number of international staff in Finnish HEIs has not been tracked for many years, but since this number is an indicator in the universities' current funding model, a concentrated effort has been initiated. On the whole, universities of applied science have far fewer international staff members than do universities, where researchers account for the majority, with very few administrative or support staff coming from abroad. Of a total of 18 100 academic staff members in Finnish universities in 2013, 3 700 (20 %) were non-Finns. These numbers also include salaried doctoral students. The largest proportion of international staff members are at the postdoctoral phase (Vipunen, 2014c).

4.7.5.   Researcher and teacher mobility

Some statistics are available at national level regarding researcher and teacher mobility, but their reliability and accuracy is somewhat suspect. Universities and universities of applied science, for instance, use differing definitions in these statistics. For universities there seems to be a trend toward a slight increase in outbound mobility of Finnish teachers and researchers, whereas the number of incoming visitors is stable or even declining. For the universities of applied science, the numbers of both incoming and outgoing teachers are declining (CIMO, 2014b). Whether these trends are a result of statistical inaccuracies, funding issues or something else is quite unknown. It may also be the case that the use of ICT has reduced the need for travelling.

4.7.6.   Transnational education, branch campuses and MOOCs

No statistics are available for transnational education or branch campuses. As there is currently no possibility of charging tuition fees and since this applies to any branch campuses (and even joint degrees), it is not likely that Finnish HEIs would pursue TNE or branch campuses very actively. Some limited success has been achieved by institutions offering continuing education, consultancy or related activities internationally.

Despite being fairly technologically oriented, Finland and Finnish HEIs have not been in the forefront of the massive online open courses (MOOC) movement. No national-level statistics are available on these, but in Finland online education is still mostly seen as complementary to face-to-face education. Educational technologies are used by all universities and universities of applied science, and some open courses have been offered by individual academics or departments, but in overall terms usage is minimal and no national MOOC platforms have been established.

4.7.7.   Capacity-building in developing countries

Capacity-building has been a long-standing feature of higher education in Finland, but whether corresponding university initiatives should be considered part of national policy, or whether they are the responsibility of individual institutions, or even individual academics, has changed considerably over the years. Since the 1990s and well into this millennium, there was a fairly clear lack of connection between the Ministry of Foreign Affairs and universities. Only following the introduction of the North-South (see http://www.cimo.fi/programmes/north-south-south) and HEI ICI (available at http://www.cimo.fi/programmes/hei_ici) programmes, both coordinated by CIMO, was this link re-established. Simultaneously, ten Finnish universities set up a network (see http://www.unipid.fi) to promote knowledge-based sustainable development cooperation.

4.8.   Summary: From margins to mainstream

Finland is a relatively small country, with a language that is hardly spoken beyond its borders. Its location in the north and somewhat on the outskirts of Europe and its lack of colonial history or traditions of large-scale immigration would not seem obvious foundations for internationalisation of higher education. Yet in the past 25 years the country and its higher education institutions have taken significant strides in becoming more internationalised. Whether one looks at the numbers of student exchanges, degree-seeking international students or, more recently, the numbers of incoming faculty members, it is safe to say that Finnish higher education already meets many European goals for higher education internationalisation, including the student mobility target of 20 % set out in the EHEA Leuven Communiqué (European Union, 2009).

Nonetheless, there remain several obstacles and challenges for furthering the process of internationalisation. Finnish universities and universities of applied science are far too accustomed to working towards the achievement of quantitative goals in their internationalisation efforts. To align themselves with European priorities (European Union, 2013) for HEIs, especially those related to the global race for talent, Finnish higher education institutions must become more quality-oriented in their approach to internationalisation.

There are also several areas within the process of internationalisation in which the Finnish higher education system needs to improve. These include having a more uniform, structured approach to digital learning, including MOOCs. At the moment there are many individual initiatives in place, but even at the level of individual institutions, clear strategies and policies on the use of information and communication technologies are lacking.

Other emerging issues are tuition fees for non-EU students and the whole approach to transnational education (TNE). The next Finnish government to come into power following the general election in April 2015 must decide to what extent it will allow, and indeed encourage, higher education institutions to participate in the global higher education

marketplace. The issue of fees is very much an area of debate and disagreement in Finnish higher education policy, and it should be clearly resolved as soon as possible.

A third underdeveloped aspect is internationalisation at home and the internationalisation of the curriculum. At the moment, this is left very much in the hands of the faculties and academic departments responsible for offering the degree programmes and, since the results are far from uniform, institutions may wish to consider more policy guidance and practical support in this area.

As a whole, the Finnish higher education system is functioning very well. Institutions are fairly well-funded (European Union, 2009), they have very good infrastructure, and quality assurance schemes are in place to make sure research and teaching are conducted at an internationally competitive level and in accordance with academic values. Universities and universities of applied science are becoming accustomed to working more strategically and maintaining a balance between autonomy and accountability. However, when it comes to internationalisation, they should align their efforts more closely with their institutional missions, rather than relying on governmental guidance and target-setting, as they have done so far. This also requires institutions to make internationalisation a central component in their strategies and for the Ministry of Education and Culture to support this more differentiated approach to internationalisation in its policy formulation and funding decisions.

5. FRANCE

Patricia Pol and Andrée Sursock

5.1. Introduction

By nature, universities aspire to be international because it is a highly effective way of ensuring the quality of their activities. France's intellectual and cultural heritage has long served as an international magnet and the proven calibre of its higher education and research institutions has contributed, and continues to contribute, to the international attractiveness of the country. As a consequence, according to UNESCO (2014) figures, France is the third most popular destination for international students, after the USA and the United Kingdom. According to the Ministry of Education, Higher Education and Research, France is ranked third in terms of the number of projects selected by the Seventh Framework Programme for Research and Technological Development (FP7) — the EU's main funding instrument for research — and sixth for scientific publications. The level of international collaboration in scientific publications is also one of the highest in the world (47 % of all publications are with international partners).

Despite these obvious strengths, France cannot afford to be complacent about its international credentials. The international stage is crowded with other actors, all jockeying for position. This, as well as a range of internal and external considerations, has prompted policymakers to restructure the higher education system in order to improve its international attractiveness, its positioning and impact.

5.2. The French higher education system: universities, schools, research institutes

With 2.42 million students in 2013, 12 % of whom are international students, the French system of higher education and research is characterised by a marked degree of internationalisation, as evidenced by the levels of international recruitment, international research partnerships, etc. The system comprises three main types of institution:

- Universities (73 in total - 1.5m students): all universities are public institutions and all are required to operate a non-selective admission policy in the first year of both bachelor's and master's degrees; fees are low and are the same for both national and international students. Since 2002, the Bologna three-cycle framework (known as the 'réforme LMD' for Licence-Master-Doctorat) has been implemented as follows: first degrees or 'licences' (180 ECTS), master's (120 ECTS) and doctoral studies (3-4 years). The institutes of technology, based in the universities, offer a short, two-year degree (120 ECTS). Since 2009, several French universities have merged or are in the process of merging, thus reducing their number from 84 to 70 in 2014. The Sorbonne remains one of the most well-known brands in the world but all French universities are able to attract international students and researchers thanks to their international curricula and research projects.

- Schools (3 000): there are many different types of selective schools, ranging from the top 20 élite engineering and business 'grandes écoles' with high levels of research and doctoral programmes, to the 300 members of the 'Conférences des Grandes Écoles' (CGE), the specialised schools of agriculture, architecture, arts, and many others - mainly private - in the field of management. All these schools

generally have highly selective admission procedures. The diploma in engineering (titre d'ingénieur diplômé) at masters' level is awarded after completion of a short-study course of 120 ECTS ('classes préparatoires'), followed by a further 180 ECTS. For historical reasons, not all the schools fall within the remit of the Ministry of Higher Education; a number of other ministries are responsible for some of them (the Ministry of Industry: École des Mines, Agriculture; the Ministry of Defence: École Polytechnique; the Ministry of Environment and Ecology: École des Ponts et Chaussées, etc.). The international reputation of the top French 'grandes écoles' is particularly strong.

- Research institutes (30): of the research organisations, the Centre National de la Recherche Scientifique (CNRS) is the largest (around 2 000 full-time research, technical and administrative staff, including doctoral candidates) and the first-ranked European contributor to FP7 in terms of the number of projects submitted and selected; 95 % of its research laboratories are 'mixed research units' (UMR) which are joint ventures with universities. This means that 60 % of PhD candidates registered in a doctoral school are working in a mixed laboratory shared between a research institution, a university or a 'grande école'. These organisations have very substantial international research budgets and partnerships, notably with the USA. The largest number of CNRS joint publications is with US partners.

Although the majority of students are enrolled in public universities (82 % in 2013), the private sector is growing at a relatively faster rate: the private sector growth rate has been 57 % since 2000 as opposed to 4 % for the public sector.

One of the characteristics of the French system is that the bulk of the nation's elite, in both the public and the private sectors, are alumni either of the top 20 most selective engineering, business, administration or research-active 'grandes écoles, or of the 'écoles normales supérieures', specialising in fundamental science, the social sciences and humanities. This situation puts a great deal of pressure on public universities, which are required to offer first degrees that address the needs of a very diverse student population.

To enhance synergies between these three different types of institutions, the most recent law regulating higher education and research (23 July 2013) provided a framework for cooperation that resulted in new public higher education and research institutions, and the goal is to create comprehensive universities called 'communautés d'universités et d'établissements (COMUE)' to restructure French higher education and research by 2015, and to serve as 25 regional or inter-regional centres of excellence across France. Their spatial distribution ensures that all regions are served by higher education and research.

5.3. European and other supranational programmes and policies: collaboration and competition

For historical reasons, three major factors have driven internationalisation policies at national and institutional levels, and played a crucial role in the evolution of French international cooperation policies.

5.3.1. Policies related to French-speaking countries

Since the 1960s, France has been an active member of the 'Organisation Internationale de la Francophonie' (International Organisation for the French-Speaking World) and has played a strong role in capacity-building in its former colonies. The structure of the higher education system in the main French-speaking countries of North and sub-Saharan Western

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Africa shaped some of France's national internationalisation policies for over 30 years (from the 1960s to the 1990s) and has had an impact on the profile of incoming international students. Consequently, almost 50 % of incoming students (credit and mobility) come from these regions. A range of national policies has been introduced, including the Ministry of Foreign Affairs' grant initiative, the creation of a French-speaking university agency (AUF), mobility programmes enabling numerous professors and university leaders to settle abroad, technical assistance programmes in higher education and research to build research laboratories, and the training of doctoral candidates in preparation for their future role as university academics, etc.

5.3.2.   European policies

Since the launch of the major European research and higher education programmes, France has been extremely active, achieving high rates of success with the Erasmus and framework research programmes. France has also played a major role in the creation of the European Higher Education Area and the European Research Area. The Sorbonne declaration in 1998 marked the emergence of the Bologna process. Since then, France has supported and implemented most of the main elements of the Bologna process, including the introduction of the LMD reform in 2002, the establishment of the National Commission for Professional Qualifications (CNCP) for the validation of new degrees, and, in 2007, the replacement of the existing evaluation council with the National Agency for the Evaluation of Research and Higher Education (AERES). By the end of the 1980s, the European dimension in education clearly contributed to the development of international relations offices in higher education institutions; the first mission of these offices was to deal with the Erasmus programme and intra-European credit mobility. In addition, participation in the construction of the European Higher Education Area is defined as one of the public service missions devolved to the universities in the 2007 Law for Higher Education (LRU) and the 2013 Law for Higher Education and Research.

5.3.3.   International rankings and competitive approaches

When the Shanghai Ranking appeared in 2003, it was something of a bombshell: only three French universities - and none of the 'grandes écoles' or the research organisations - were in the top 100. While university mergers have improved the situation since 2010, the fact that French institutions have barely moved in the rankings reveals that their position is not connected either to their technological and scientific production or to the country's economic standing. The phenomenon may be explained to a certain extent by the importance accorded by French researchers to research organisations; although the majority of scientific publications derive from mixed research units, they are not published with the names of the universities but with those of the research organisations, and the latter are not included in international rankings (Sursock, 2015; Vidal & Filliatreau, 2011).

Amid fears that French universities may be seen as less attractive, the focus of both national and institutional policies has switched to the main scientific countries and the emerging BRICS. Bilateral commissions at the highest level have been established for instance with Brazil, China, India, Japan, Russia and South Korea; specific scientific fields have been targeted; agreements have been reached regarding degree recognition; scholarship programmes have been offered and bilateral forums have been organised.

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5.4. National policies for internationalisation: a multi-actor, multi-pronged approach, at home and abroad

Over the past 20 years national policies for the internationalisation of higher education have been decisive and have been based on three main approaches:

- The inter-ministerial approach: designed to create the conditions to improve the attractiveness of France as a whole. A 'Strategic Council for Attractiveness' was set up in 2013 to propose ways of attracting investment from foreign companies and to improve the integration of international talent, researchers and students. Coordination is led by the President of the Republic. In the sphere of higher education and research, considerable emphasis is placed on degree mobility (how to attract talent, students, young researchers, researchers and staff and to improve the quality of the hosting process), the internationalisation of curricula and research in partnership with industry (curricula in foreign languages, development of internships in French companies and their subsidiaries abroad). Other issues at the heart of the debate are the conditions for granting visas, improvements in social security and the question of hosting families.

- The French Ministry of Foreign Affairs, through the development of diplomatic policy, works to strengthen French global influence and to promote bilateral cooperation strategies for higher education and research. It coordinates cultural and scientific diplomacy and is supported by the second largest cultural attaché network in the world (in 135 countries), the biggest network of schools and colleges abroad, the 'Alliances Françaises', the 'Institut Français', and specific programmes and instruments of cooperation in higher education and research (such as the French government's 80 million euro grant programme[15]) managed by the Directorate-General of Global Affairs.[16]

- The Ministry of National Education, Higher Education and Research (MENESR) coordinates higher education and research policies including internationalisation, which is an integral part of its overall strategic objectives. Over the past 15 years it has developed a system of grants for outgoing degree and credit mobility, with eligibility based on social criteria.

These three approaches translate into specific actions at institutional and national level.

- At institutional level

  - International cooperation forms an integral part of the mission statement of universities, having been enshrined in law since 1968 (Loi Faure 1969, Loi Savary 1984). The concept was extended to include the development of the European Higher Education Area, and the most recent Law of Higher Education and Research (2013) regulates new areas of internationalisation, such as the possibility to deliver curricula in foreign languages. The principle of equality for all students, domestic or foreign, has prevented the introduction of a fee differentiation policy, although in 2005 a governmental decree permitted tuition fees in the case of specific services delivered to foreign students within given cooperation agreements.

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[15] BGF, 'Bourses du gouvernement français' managed by Campus France since 2011.
[16] www.diplomatie.gouv.fr

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- Since 1990, the Ministry has signed four-year (currently five-year) contracts with approximately 200 higher education institutions for the allocation of resources and the accreditation of degrees and research groups. These contracts included a specific international chapter that has become integrated in the overall strategic process since 2005. Following the introduction of the education law in 2013, these contracts will be entered into at the level of the COMUE (association of universities), and international strategy will be one of the performance criteria for the Ministry. Past experience with the 'regional research cluster' scheme known as PRES ('pôle de recherche et d'enseignement supérieur') showed that international strategies were difficult to implement collectively if they were not included in the overall strategy of the research clusters and if they did not have strong political support from all the members of the PRES (Pol, 2012b). In the first contracts signed in 2014 by the four Parisian COMUEs, international strategies were clearly linked to academic and scientific policies, envisaging a transfer of competence for some joint partnerships with selected countries and the appropriate means to support these activities.

- At national level
  - The Ministry of Education, Higher Education and Research has a budget of around EUR 50 million to fund specific projects, programmes, campuses and schools abroad.

  - More recently, international objectives have been identified in the national strategies for research and higher education. A national research agenda entitled 'France Europe 2020' was adopted in April 2013, closely reflecting the policy priorities of the Horizon 2020 Grand Challenges[17] and pinpointing the Mediterranean area as a target for development. Internationalisation is fully integrated in the overall national higher education strategy and is presented as a means of building the future ('la France de demain').[18] Several target objectives have been proposed to underpin a 'European and humanistic model of internationalisation'. These include the adoption of a hosting culture ('culture de la bienvenue'), strengthening the quality of internationalised course provision, educating students to become global citizens (language and culture), and facilitating international mobility of students with fewer financial resources. Preliminary strategy also refers to the need to debate higher fee structures for international students, with provision for students who are less well off. The strategy aims to double the number of both incoming international and outgoing French students (both credit and degree mobility). This proposal will be translated into an action plan before the end of 2014 and will be adopted in a White Paper, along with the national research strategy.

  - Extending the reach of French higher education through the development of bilingual MOOCs, to be made available on the national platform 'FUN' (France Université Numérique), with a marked emphasis on French-speaking countries.[19]

Within this context, the main characteristics of internationalisation policies and their implementation have been based on the three following types of activities.

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[17] http://cache.media.enseignementsup-recherche.gouv.fr/file/France_Europe_2020/18/3/AgendaStategique02-07-2013-EnglishLight_26

[18] cf. the report 'Rapport d'étape de la StraNES', http://cache.media.enseignementsup-recherche.gouv.fr/file/STRANES/05/3/Rapport_etape_StraNES_8_juillet_-_17h04_339053.pdf

[19] https://www.france-universite-numerique-mooc.fr/

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- Attracting international students

  The aim is to attract students and young researchers to specific curricula at master's and doctoral levels. These students will come from countries with strong economic development, in particular emerging countries, as well as from countries in the southern hemisphere, to be welcomed within an overall framework of solidarity and cooperation. Consequently, about 30 % of incoming students (degree- and credit-mobility) will receive need-based scholarships.

- Establishing French institutions abroad and bilateral partnerships with targeted countries

  This strategy was developed in the 19th century. Since then, and in particular over the past 20 years, this policy has evolved and the approach diversified. Some examples of projects coordinated at national level:

  - The five 'French schools abroad',[20] created between 1846 and 1928, promote the development of research and training for research in the social sciences and the humanities (Écoles Françaises d'Athènes et de Rome, Casa Velazquez à Madrid, l'École Française d'Extrême Orient, l'Institut Français d'Archéologie Oriental du Caire);

  - Autonomous French-speaking universities with varying national status: Galatasaray University (Istanbul, Turkey), Université Française d'Egypte, Université Française d'Arménie (UFAR, Erevan), Université des Sciences et Technologies à Hanoi (Vietnam);

  - Schools and universities that were established through bilateral agreements, and have become autonomous following a period of substantial financial and diplomatic support from France. These include:

    - in North Africa and the Middle East: École Supérieure de Beyrouth and École Supérieure Algérienne des Affaires in Lebanon and Algeria;

    - in Vietnam: Centre Franco-Vietnamien pour la Gestion, Programme Franco-Vietnamien pour la Formation des Ingénieurs;

    - in China since 1999: various institutes of engineering and technology in Beijing (Centrale Pékin), Wuhan, Shanghai, Tianjin and Canton.

- Promoting French higher education and student mobility

  - EduFrance was created in 1998 and became Campus France in 2011, having incorporated the national grant policy of the Ministry of Foreign Affairs, EGIDE and the international activities of the Centre National des Oeuvres Universitaires et Scolaires (CNOUS). Campus France has 145 offices in 114 countries and manages all incoming mobility grants, whether from the French government (BGF) or foreign institutions. Campus France works under the joint direction of the Foreign Affairs Ministry and the Ministry of Higher Education and Research.

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[20]   http://www.enseignementsup-recherche.gouv.fr/cid56594/ecoles-francaises-a-l-etranger.html

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- Since 1995, the 'Agence Erasmus+ Education Europe, Formation France' aims to promote European programmes and manage Erasmus outgoing mobility.[21]

5.5. Other key stakeholders and funding schemes for internationalisation: cities and regions, business and industry

The regions, the departments, and the cities each have different initiatives to encourage and finance mobility, bilateral cooperation, research projects and doctoral candidates. There are no consolidated data at national level, although the Association of French Regions[22] maintains that while all the regions have implemented internationalisation policy in higher education and research, some regions are more involved than others in this area.

Part of international strategy at national and institutional level is to prepare graduates for the workplace, enhancing their skills for the increasingly international labour market. And business and industry, anxious to attract the best talent, are more and more involved in the internationalisation process. For example, companies participate in the funding of French programmes delivered abroad (such as engineering schools in Brazil, China and Mexico) and offer internship opportunities for international students in their subsidiaries or at their headquarters. Similarly, French companies are developing joint laboratories with foreign universities, such as the Air Liquide Joint Laboratory for Oxy-Combustion established in China in 2010 with the University of Zhejiang, the Essilor International Research Centre with the Medical University of Wenzhou (WIEOR), and the Veolia Environment Joint Research Centre for Advanced Environmental Technologies created with Tsinghua University.

5.6. Institutional policies for internationalisation: with greater autonomy, growing strategic capacity

In the French context, international institutional policies have been strongly linked to national internationalisation strategies and European policies, as mentioned above. However, the responses have varied depending on the capacity of the institution to design overall policies and strategies.

The increased scope for autonomy that was recently granted to universities has increased their self-steering and strategic capacity, including shaping their internationalisation. Thus, the different reforms implemented in France since 1984, and in particular the 2007 LRU law, have allowed French universities more institutional autonomy, leading to strategic approaches at institutional level. Moreover, the contractual policy implemented since 1990 has been an element supporting the strategic process of institutions; other change drivers toward more strategic institutions include the external evaluation procedures of the National Evaluation Committee (CNE, 1984-2007) and the national agency AERES based on a five-year external institutional evaluation cycle (since 2007). As a result, strategic capacity is growing and international policies and strategies have been implemented on a specific basis or integrated into the overall institutional strategy. Both the 2014 International Association of Universities Global Survey (Egron-Polak & Hudson 2014)[23] and the European University Association survey on this topic (EUA, 2013) confirm that internationalisation is increasingly important for institutional leadership in France and in Europe and that institution-wide, international strategies are being designed and implemented.

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[21] www.europe-education-education.fr
[22] www.arf.asso.fr
[23] This is based on 59 answers from French higher education institutions, mostly from the non-university sector.

However, an analysis provided by the national agency AERES in June 2012 (Pol, 2012a) showed that the international strategy of the whole institution was barely taken into account either as a strength or a weakness. When it did appear as a strength, it was for positive mobility trends, governance of the international and European dimensions and the internationalisation of the curricula. Weaknesses included the lack of a clear and shared international policy and of clear geographical targets.

Despite the challenge of implementing a shared European and international strategy at faculty and institutional levels, French institutions have been very active in: designing mobility policies (facilitating credit and degree recognition, creating 23 one-stop shops to address visa issues, housing and cultural activities, grant schemes, etc.); internationalising the curricula (master's degrees in foreign languages, credit mobility curricula at all levels, programmes, invitation and recruitment of foreign staff, double and joint degrees, co-tutorship of theses, export of curricula); establishing branch campuses abroad (e.g. La Sorbonne Abu Dhabi, Institut Tunis-Paris Dauphine, ESSEC Singapore, INSA international in Morocco); and developing joint research programmes through different instruments such as that implemented by the international mixed units (UMI) and the associate international laboratory (LIA) – both as joint ventures of the universities with CNRS.[24]

5.7. Key performance indicators for French internationalisation: student and staff mobility

5.7.1. Student mobility (credit and degree)[25]

- Incoming mobility
  After experiencing significant growth of 90 % after 1998, France was ranked third for international mobility until 2008; it is now in fourth place, with a small decline over the past four years. It currently hosts 6 % of internationally mobile students (OECD, 2014). Foreign students[26] (around 295 000) represented 12 % of the overall student population in 2013. Of these, 75 % are studying at universities. Foreign students account for 11 % of students enrolled at first degree, or bachelor's level, 18 % at master's level and 41.5 % at PhD level. With almost one international student in two at PhD level, France demonstrates its high level of attractiveness at doctoral level and in research, where specific policies for international recruitment and joint publication have been developed by PhD schools.

  In 2012-2013, 45 % of international PhD candidates were in fundamental science disciplines and 33 % in social sciences and humanities. However, 61% of graduating PhD students were in fundamental sciences and 22% in the social sciences and humanities.[27] The geographical origin of incoming students reveals significant differences according to the level of studies. Around 50 % come from Africa (26 % from North Africa, with Morocco the most popular country of origin). While 20 % of foreign students come from Asia (China is the second most popular nation of origin, accounting for 10.5 % of foreign students), Asian students are primarily PhD level

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[24] http://www.cnrs.fr/derci/spip.php?article48
[25] The French statistics for incoming and outgoing mobility include credit and degree mobility, with an assumption of 80 % of degree mobility for incoming international students.
[26] Foreign students are identified by their nationality.
[27] One possible reason for this difference is that it is almost compulsory to have a work contract in the engineering and science laboratories whereas the situation is different in social sciences and humanities, meaning that the duration of the doctoral studies is much longer and the dropout rates are higher.

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students and represent 30 % of international PhD candidates (around 10 % in 2002), just behind Africa.

The proportion of European Union students is 20 % at all levels. The largest number of European students come from Germany (in sixth place, representing 3 % of all foreign students), followed by Italy (2.9 %), Spain (2 %), Russia (1.7 %), Romania (1.6 %) and Portugal (1.4 %).[28]

- Outgoing mobility
  According to the Ministry of Higher Education, and based on UNESCO figures, France is in fourth place for outgoing mobility (around 55 000 students abroad) but the true figure may well be considerably higher if we include all types of mobility, including internships and the consolidated figures coming from the universities themselves. The 'Agence Erasmus+ France Education Formation' (previously known as the 2e2f Agency) estimates the figure for outgoing mobility to be around 130 000.

- European mobility
  The first results of Erasmus+ are positive for France in the field of higher education, with a budget increase of 14 %. France is the second EU country for outgoing mobility (around 26 000 students, slightly less than Spain and more than Germany) and the third for incoming mobility (after Spain and Germany). France is the leading country for outgoing mobility for internships; this is in line with its curricular policy at master's level and the increased support given to find places in foreign companies abroad.

  France has been the major coordinator and participating country for Erasmus Mundus. Specific data can be found on the website of the 'Agence Erasmus+ France Education Formation'.[29]

5.7.2. Staff mobility

French higher education is attractive to junior and senior academics and researchers seeking either short- or long-term stays.

In 2013, around 5 431 scientific visas were granted to faculty members or researchers coming from outside the EU: 39 % for a period of three months or less and 61 % for a period of over three months. The following six countries accounted for more than 50 % of the visas: Algeria, Brazil, China, India, Tunisia and the United States.

In 2012-2013, 9 % of faculty members were international. The highest proportion is to be found in the sciences (12.7 %) and the lowest in law (less than 6 %). The figures are higher in the research organisations (15 % for CNRS, 14 % for INSERM, 8 % for INRA) than in the universities (8 %). Furthermore, the proportion of young international academics who have been recruited recently is increasing: 20 % of junior faculty members in the universities are international (roughly 60 % from the EU, 20 % from Africa and 20 % from other parts of the world), as are 30 % of the researchers in research organisations such as CNRS.

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[28] See Campus France's key figures on mobility that gives a breakdown by main nationality: http://ressources.campusfrance.org/publi_institu/etude_prospect/chiffres_cles/fr/actualisation_chiffres_cles_2012-2013.pdf

[29] http://www.agence-erasmus.fr/page/agence

5.8. Which way forward? French internationalisation at a crossroads

French strategy for the internationalisation of higher education has been built on the principles of cooperation and influence, and recently on attracting highly qualified talent, rather than on purely commercial motives. Although the results of such choices have helped the French higher education system to be attractive and highly considered worldwide, it is now at a crossroads. Faced with limited national and institutional resources, key questions should be addressed. Should the overall French system be more European (optimising its European programmes and working within Europe, instead of further developing its role beyond Europe and beyond European competition), should it be more international (i.e. attracting more international students, developing outgoing mobility – virtual or real – at master's or PhD levels, for instance), or should it be more performance-oriented (increasing fees for all international students or for some targeted countries or curricula), or more inclusive, more humanistic, or more cooperative? Should emerging countries be targeted more than developing countries? It is not at all clear whether these issues will be discussed in the coming years since 'equality for all' remains a strong national commitment and the conditions for organising such a national debate are not currently favourable.

However, national strategies for higher education and research that are being developed will encourage more quality, more inclusion, more European involvement and more funding diversification. Some of the strategic objectives that have been proposed at national and institutional levels include:

- Enhancing national policy to improve the reception of international students, young researchers and staff and encourage outgoing mobility through a stronger National Agency for Promotion and Mobility (Campus France).

- Improving the balance between national, regional and institutional strategies and ensuring that national strategies closely underpin institutional strategies for internationalisation.

- Encouraging flexible and sustainable European and international cooperation strategies in respect of research and education at university level.

- Developing the systematic use of digital programmes in the curricula and in cooperation activities.

- Optimising and strengthening the relationship with the economic sector in developing joint programmes in targeted regions and countries.

Within this framework, each stakeholder has a role to play, with higher education institutions continuing to be key players in the internationalisation process. National and European policies need to be coordinated and bring added value to ensure quality, equity and responsibility.

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6. GERMANY

Bernhard Streitwieser & Niels Klabunde

6.1. Introduction

Germany today is a leading player in the marketplace of global higher education (Project Atlas, 2013). While Germany's position in continental Europe as a major receiver and sender of students is a clear indication of the healthy state of its internationalisation efforts, the country is also active in many other ways that are emblematic of an engaged and comprehensive internationalisation process (de Wit, 2011; Hudzik & Stohl, 2012; Rüland, 2012). Currently, Europe attracts 45 % of the world's 4.5 million globally mobile students. Of these, Germany attracts 6 %, making it the fifth most popular host country in the world for foreign students, and particularly Chinese students, who make up 12.5 % of the total higher education population in Germany, followed by students from Russia and other European countries closer at hand. Germany is also one of the most active countries in sending its students abroad, with almost 33 % of all undergraduates now venturing abroad before graduation through the Erasmus mobility programme or other study abroad opportunities; this number is expected to increase under the new 2014 Erasmus+ programme. For those students not going abroad, 57 % of German higher education institutions offer international programmes, with 20 % offering the international programme entirely in English, and 40 % of those programmes leading to a double degree including international study. This is particularly true of the technology-oriented universities ('Technische Universitäten') and smaller colleges ('Fachhochschulen'). According to the International Association of Universities' (IAU) 2014 global survey (Egron-Polak & Hudson), when asked about the expected benefits of internationalisation, German respondents highlighted three as being most significant: to develop in students a greater international awareness and deeper engagement with global issues; to increase international networking through faculty and researchers; and to enhance international cooperation and capacity-building.

Generally, internationalisation in Germany is a more coordinated process than in some of the other education systems in Europe and the rest of the world. This strength derives from the leadership and from the support of the five most powerful promoters of German internationalisation: the German Federal Ministry of Education and Research (BMBF), the German Council of Science and Humanities (DFG), the German Rectors Conference (HRK), the German Academic Exchange Service (DAAD), and the Alexander von Humboldt Foundation (AvH). The agenda-setting by these federal-level players defines overarching goals, which are then carried out at state and local level by agencies, research institutes, foundations and academic institutions.

6.2. The German higher education system: a snapshot

As Germany is a democratic and social federal state, each of its sixteen Länder has its own Ministry of Education, Cultural Affairs and Science, but each works in coordination with the other states through regular meetings of the Standing Conference of Ministers of Education and Cultural Affairs (KMK). The higher education system includes universities, technical universities, universities of applied sciences, teaching colleges, technical colleges specialising in natural sciences and engineering and institutions devoted to arts, music, management and public administration (UNESCO-IBE, 2007).[30] The Federal Ministry of

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[30] See the UNESCO, World Education Data, 6th edition, 2006/7, Structure and organisation of the

Education, Science, Research and Technology (BMBF) is responsible for educational legislation at the federal level and sets national priorities which are then consolidated at state level. While the federal structure of the government and the Basic Law governs the general foundation of education at all levels, the Framework Act for Higher Education guarantees that individual states have the right to self-administration, thus giving higher education institutions a considerable degree of autonomy and responsibility over vocational training, research and teaching in their own regional institutions (UNESCO-IBE, 2007).

In 2012-2013 there was a total of 2 499 409 students participating in German higher education (2 217 208 German nationals and 282 201 foreign students) and 432 universities and universities of applied sciences (158 private and 274 public) in operation (Project Atlas, 2013). In Germany, private universities can receive accreditation by proving that they have equivalent status to established state institutions, but their levels of enrolment are low. Many new and innovative not-for-profit and for-profit private institutions have been established over the past decade. According to the OECD 2014 report, Education at a Glance, 53 % of young Germans are expected to enter academically-oriented tertiary programmes in their lifetimes, an increase from 30 % in 2000 and now close to the OECD average of 58 %. 22 % are expected to enter vocationally-oriented tertiary programmes, a substantial increase from 15 % in 2000 and well above the OECD average of 18 % (OECD, 2014, p. 4). Currently, however, the 28 % of tertiary-educated adults in Germany is below the OECD average of 33 % and lags behind other countries' higher education entry and graduation rates. Nonetheless, 5.4 % of young Germans are expected to enter advanced research programmes such as PhD courses (ISCED 6) at some point in their careers, the highest rate of all OECD and partner countries, which average 2.6 % (OECD, 2014, p. 11).

6.3. European or other supranational programmes and policies: major impact from the Bologna process and Erasmus

The two most prominent supranational initiatives that have also impacted German higher education are the Bologna process, which began in 1999, and the Erasmus Student Mobility Programme, dating from 1988.

In 1999 Germany, as a founding proponent of the Bologna process, joined with 28 other European countries (today 46) to create a European Higher Education Area (EHEA) by 2010, designed to foster greater transparency between Europe's higher education systems, streamline the recognition of degrees and academic qualifications, and accelerate inter-European student and staff mobility. For Germany, Bologna is arguably the most significant reform to higher education since Wilhelm von Humboldt's 1810 fusion of teaching and research in the university mission. The process has 'completely transformed German higher education, and shifted it toward student learning-centred measures, transparency on outcomes and employability' and a system that is now more uniform even within its continuing federalist structure (Bieber, 2011, p. 4). Bologna has dramatically changed the structure and governance of European and German higher education, not only in obvious ways through the implementation of the Anglo-American three-tiered structure of BA-MA-PhD, new quality assurance mechanisms and the introduction of tuition fee schemes in some countries (but notably not in Germany), but also through major reorganisations of the administration and staffing structures of thousands of higher education institutions and new ways of thinking about how political and financial resources are allocated to secondary and higher education. Bologna reforms in Germany have been seen by some as overly

education system, Glossary, for detailed definitions of Universitaet, Technische Universitaet, Technische Hochschule, Paedagogische Hochschule, Kunsthochschule, Musikhochschule, Fachhochschule, Verwaltungsfachhochschule.

focused on competence development and skill-building at the expense of more widely applicable critical thinking ability. In this process, some feel that the institutions and their faculties have been robbed of their autonomy to shape curricula and learning along the lines they think best, only to find themselves more mired in bureaucracy than before (Grove 2012). Countering the critics are those who argue that massification is the real culprit, increasing the administrative load and creating an inevitable focus on human capital-oriented outcomes. They also argue that Bologna is spearheading reforms that were in fact long overdue and that higher education institutions have little choice but to accommodate the greater numbers and diversity of learners who now seek education in Germany.

The second supranational initiative that intersects most importantly with Germany's internationalisation efforts is the European Community Action Scheme for the Mobility of University Students, commonly known as the 'Erasmus Programme' and, as of 2014, as the revamped Erasmus+. Erasmus has been touted by some as the real beginning of the internationalisation of higher education in Europe (Maiworm, 2001) and as 'a breakthrough' in consolidating public support for the value of study abroad more generally (Teichler, 1996). The taxpayer-funded programme was initiated as a European Commission joint study scheme in 1987 on the heels of smaller-scale exchange initiatives that already existed. In Germany Erasmus is managed by the DAAD and currently involves more than 2.5 million students and 300 000 education professionals from 33 participating countries, (representing over 3 000 higher education institutions), each spending a period of 3-12 months in another European country. Some observers have characterised Erasmus as a European success story and even as 'the single most successful component of EU policy' (Altbach & Teichler, 2001, p. 10). Some of the research indicates that despite ebbs and flows in yearly enrolment, over time student access has broadened and programme participation has a positive impact on developing cross-cultural empathy and knowledge (Kehm, 2005; Souto Otero, 2008; Zhelyazkova, 2013). On the more negative side, some alumni surveys find funding amounts insufficient in certain settings, administrative issues and paperwork unduly burdensome, and students sometimes lack the foreign language competence to succeed abroad (Yülcelsin-Tas, 2013). Finally, the effect of Erasmus participation on career advancement, increased income and raised social status remains generally uncertain (Teichler & Janson, 2007).

6.4. National policies for internationalisation: a focus on excellence, a move from fragmentation to increasing coherence

The impact of the multi-billion-euro 'German Excellence Initiative', one of Germany's most visible projects administered by the German Council of Science and Humanities, is undeniably influencing the perception of Germany's higher education system internationally, whilst also strengthening the competitiveness of European higher education as a whole. The initiative focuses on a significant number of resources that promote top-level research and improve the quality of German universities as they strive to enhance their internationalisation profiles and achieve 'world-class' recognition in the face of global competition, including the challenges posed by global university rankings, the global race for academic talent and research production, amongst others. Jointly approved by the German federal government and the 16 Länder in 2005 and reapproved in 2012 until 2017, the most recent round of initiatives has provided an additional EUR 2.7 billion for promoting 45 graduate schools, 43 clusters of excellence and 11 internationalisation strategies for increasing training capacity and building further links to research centres and international collaborations (DFG, 2012). The German Research Foundation (DFG) manages the

Excellence Initiative, which has three lines of funding – graduate schools, research clusters and institutional strategies. 11 universities were chosen to receive the Excellence Initiative funding award and, over the period 2012-2017, had EUR 2.5 billion made available to them. An additional EUR 46 million to promote international activities (i.e. international training research groups) were identified as specific international funds (DFG, 2013).

Beyond the Excellence Initiative, national policies for internationalisation have been somewhat fragmented in the past, put forward by various organisations and concentrating on specific areas of their constituent base. Since 2008 there has been a noticeable move away from disparate policies towards a more coherent and common agenda on internationalisation that takes various stakeholder perspectives into account. The most recent and coherent national strategies on internationalisation are the 2008 Internationalisation Strategy of the German Federal Ministry of Education and Research, and the joint declaration of the federal and Länder ministers of education and science on the internationalisation of higher education as part of the 2013 and 2014 Action Plan on International Cooperation. While the 2008 Internationalisation Strategy and the 2014 Action Plan on International Cooperation refer to the internationalisation of the whole education system and set certain concrete goals, such as increasing incoming student mobility to 350 000 each year and working towards a target of 50 % of university graduates spending time abroad by 2020, the more general goals of the 2014 Action Plan refer to strengthening international research marketing initiatives, establishing welcome centres and dual career services, expanding German university programmes and institutions abroad and increasing the professionalisation and networking of science managers in Europe. The 2013 joint declaration of federal and Länder ministers of education and science focuses specifically on higher education and can be regarded as complementing the national policy and the 2008 Internationalisation Strategy. The declaration identifies nine common goals to be implemented by the federal and individual Länder governments and covers themes related to student mobility, internationalisation at home, staff, research, services, strategic frameworks and transnational education.

Goal 1 calls for the development of Strategic Frameworks for institutional internationalisation. Goal 2 seeks to improve the legal framework, such as accreditation processes with partner institutions. Goals 3 and 4 aim to strengthen international and intercultural learning opportunities at home for all students, to prepare them for international careers and global citizenship by integrating international content into the curriculum, establishing joint degree programmes and expanding instruction in English or other languages (BMBF Internationalisierungsstrategie, 2013). Teaching and administrative staff should become competent in English and take part in intercultural training and internationalisation activities abroad. Finally, welcome services are to be expanded in order to support the cultural and social integration of international students and scientists. Goal 5 plans to increase outward student mobility to the level that will enable every second graduate to have an experience abroad by 2020. Goal 6 aims at an incoming mobility target of 350 000 students each year by 2020, to be achieved through increasing marketing activities, improving the selection and admission processes and providing better information on services and opportunities for staying in Germany. Goal 7 plans to attract more international scientists by expanding international doctoral programmes and engaging them in research and work that may attract them to stay in Germany temporarily or permanently. Goal 8 relates to an expansion of international research cooperation by improving strategic research and funding support structures. Goal 9 seeks to support and expand Transnational education through satellite campuses and programmes abroad at partner institutions. Apart from the general commitment to the goals of the mobility strategy set out at the Bucharest Summit of the Bologna process in 2012, no further or

more detailed goals on virtual mobility have found their way into national and/or joint policies of federal and Länder strategies on internationalisation.

In Germany, funding (tuition fees, scholarships) for internationalisation of higher education, including most funding for institutional scholarships, is made available mainly by public sources through the German federal government and the governments of the individual Länder. Additional public funds are made available through the ERASMUS+ and European Research programmes. Foreign governments mainly contribute scholarships for their outgoing students to study and conduct research in Germany. Private funds in the form of tuition fees for international students do not exist for public institutions. Private institutions generally do not charge differentiated fees for international students. Tuition fees are therefore not a source of private funding for internationalisation of higher education in Germany. Federal government national funds are channelled mostly through science and research organisations and other higher education-related organisations.

Probably the most significant support for German and, by extension, European internationalisation is provided by the DAAD, the largest organisation promoting German university international activity through its various funding and support programmes. In 2013 its budget amounted to over EUR 429 million. In 2012 the DAAD devoted EUR 83 million to promoting 'the international dimension of German higher education' and helping universities develop internationalisation strategies and receive assistance. Most DAAD funds go towards scholarships for German and international students and researchers. Through its links with numerous federal agencies and its worldwide network of over 120 000 students and faculties linked through scholarships and exchange experiences, it is a powerful promoter of German higher education and international cooperation. It also offers training programmes and symposia on internationalisation for teaching and management staff, and has 18 international offices and 55 information centres in 58 countries, where researchers and potential students can find advice on programmes, funding and visa issues (DAAD, 2013b).

6.5. Other key stakeholders and funding schemes for internationalisation: the DAAD, scientific organisations and foundations

National and regional funds are also combined and made available through scientific organisations, of which the top five international scholarship providers are the German Research Foundation, the Hermann von Helmholtz Association, the Max Planck Society, the Leibniz Association and the Alexander von Humboldt Foundation. While the DFG is the largest scientific organisation funding internationalisation, the AvH is the organisation with the highest international profile and a total budget of EUR 110 million (Alexander von Humboldt Foundation 2012) offering mainly international scholarships to German and foreign researchers.

Regional funds for internationalisation in the individual German states are difficult to pinpoint, largely because there are virtually no state-level programmes for promoting internationalisation and internationalisation is not a distinct budget category within general institutional funding. In addition, differential budgets of individual higher education institutions are not publicly available. Comparing the scale or relevance of the funding provided by the federal government with that provided by the German states, some qualitative evidence exists that federal sources are more significant for internationalisation activities for institutions than sources made available through general institutional budgets (Klabunde, 2014). In addition to the funds made available to institutions of higher

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education from regional governments, regional funding, in the form of the Federal Education and Training Assistance Act (BAFÖG), also supports the regionally organised German Welfare Service Organisations ('Studentenwerke') that provide subsidised housing, cafeterias and family services for domestic and international students. In 2013 regional funding also provided over EUR 159 million in scholarships toward study abroad (Deutscher Bundestag, 2014).

Other key stakeholders include the German Academic Exchange Service as the primary contact for institutional internationalisation and also the national agency for ERASMUS. The Alexander von Humboldt Foundation is the principal point of reference for scholarships for researchers. The German Aerospace Centre (DLR) manages the national EU research office of the BMBF, offering advice to grant seekers. In terms of international strategies, the German Rectors Conference is another organisation active in internationalisation through its 'Internationalisation of Universities' audit. Initiated in 2009, the audit provides a top-down, comprehensive review of each selected university's internationalisation process and advisory services, evaluating institutional internationalisation strategies and making recommendations. There are also a number of prominent think-tanks that study and support internationalisation activity in Germany, including the International Centre for Higher Education Research Kassel (INCHER), CHE Consult[31] GmbH and some of the foundations that are linked with the various political parties, such as the Friedrich Ebert Stiftung.

International students in Germany benefit from the German-wide accreditation service 'Uni-assist', which helps them and institutions to process applications and verify formal study prerequisites, such as prior educational qualifications. On the regional and city levels, the 'Studentenwerke' also offer housing, subsidised cafeterias, family and general counselling services to domestic and international students, especially those from lower-income backgrounds.

6.6. Overview of institutional policies: eight key trends

A helpful overview of institutional policies and trends appeared in a publication by the Friedrich-Ebert-Foundation in 2012 on internationalisation strategies and perspectives (Borgwardt, 2012). In that publication eight institutional policy trends were identified: 1) strategic and administrative professionalisation of internationalisation activities through the establishment of strategic centres and internal funding agencies for internationalisation activities on a competitive basis; 2) agenda-setting of internationalisation at the top level of institutional leadership through the creation of vice-presidents for internationalisation and the development of a holistic and integrative internationalisation strategy including action plans and quality assurance measurements; 3) establishment of liaison offices abroad in cooperation with the DAAD and German Science and Innovation Centres; 4) development of a wide range of high-calibre and intensive partnerships with institutions abroad; 5) decentralisation and more responsibility for internationalisation activities at department level through clearly set management objectives; 6) establishment of international lobbying networks of institutions following a common agenda; 7) franchising of institutions abroad; and 8) establishment of international summer schools and international continuing education activities in English to generate income.

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[31] See the report in particular by Beerkens, E. et al. (2010), Indicator Projects on Internationalisation - Approaches, Methods and Findings. A Report in the Context of the European project 'Indicators for Mapping & Profiling Internationalisation' (IMPI), CHE Consult, Germany.

6.7. Key performance indicators of internationalisation: international students in Germany and German students abroad

Among the numerous high-profile research reports regularly tracking German internationalisation, the joint reports issued annually by the DAAD and the Higher Education Information System (HIS), Wissenschaft Weltoffen, provide an invaluable metric on the growth of different aspects of German internationalisation and also explore sub-themes in depth, such as US-German exchanges (2014), German students abroad (2013), Chinese students in Germany (2012), MA programmes abroad (2011) and doctoral programmes abroad (2010).

Of the world's 4.5 million globally mobile students today, Europe attracts 45 %, and Germany 6 % of the global total, making it the fifth most popular host country worldwide (Project Atlas, 2013). Currently, the largest group of international students in Germany comes from China (12.5 %), followed by students from Russia (5.1 %), Poland (3.7 %), Austria (3.7 %), Italy and Ukraine (both at 3.4 %), Bulgaria (2.8 %), France (2.5 %), Spain (2.3 %), and others (52.8 %); international students now make up 12.5 % of Germany's higher education population (DAAD, 2013c, p. 4). Germany also sends almost 33 % of its higher education students abroad each year, a number expected to increase with the 2014 revamped Erasmus+ programme.

Of all German study programmes that were registered in the databank of the German Rectors Conference by member institutions, 6.9 % were registered as 'international' in terms of the content of the curriculum, the language of instruction or the fact of offering a double degree. Most of the international programmes are at graduate level. English as the language of instruction is offered in 20 % of all international programmes, and 40 % of all international programmes lead to a double degree. In total more than half of Germany's HEIs (57 %) offer international programmes (DAAD, 2013a, p. 47). A particularly high quota of international programmes exists at technology-oriented universities ('Technische Universitäten') and smaller colleges ('Fachhochschulen").

According to a British Council study supported by the Economist Intelligence Unit (2010) that examined the progress of 11 countries[32] in the internationalisation of their higher education system, Germany scored first, followed by Australia, the UK and China, with 8.4 points out of a total of 10 when combining the criteria of openness, access and equity, and quality assurance and degree recognition. On the criteria of access and equity, Germany ranked first with a score of 8.1. The DAAD and individual universities have been working to improve services and support to improve visiting students' retention and completion rates. Germany has a written code of conduct for university personnel working with international students as well as codes for personnel working at off-shore campuses (Henard, Diamond, & Roseveare, 2012, p. 36). The European Quality Charter on Mobility of 2011/12 listed Germany as the only country among 36 which achieved all four goals on the scorecard by: 1) having national and regional strategies and initiatives and government-based or publicly-funded bodies devoted to providing information and guidance on learning mobility; 2) having publicly-supported internet-based information resources; 3) having publicly-supported personalised services for counselling, guidance and information; and 4) involving publicly-supported 'multipliers' to further provide information and guidance. External monitoring bodies exist to evaluate the effectiveness of all of these services (European Commission/EACEA/Eurydice, 2013, p. 12).

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[32] Australia, Brazil, China, Germany, India, Japan, Malaysia, Nigeria, Russia, UK and USA.

Over the past 25 years there has been a steady increase in the number of German students engaging in degree-related mobility, from 34 000 in 1991 to 133 800 by 2011. The German Academic Exchange Service, in its Strategy 2020, seeks to increase the number of foreign students in Germany to 350 000 and the number of German students going abroad to 50 % within the next six years (DAAD, 2012, 2013).

In 2006 and revised in 2011, the DAAD and BMBF jointly launched a EUR 1 million campaign, 'Go Out! Studieren weltweit,' with the goal of ensuring that half its domestic students spend at least one semester abroad, particularly in less well-represented destinations like Africa, China, Eastern Europe, India and Latin America. In 2013 the Joint Science Conference (GWK) set two distinct internationalisation targets: 50 % of all graduates should gain study experience abroad (Target A), and 33 % of all graduates should have at least a 3-month study-related visit abroad (Target B). For German students abroad, the major receiving countries are Austria (22.9 %), the Netherlands (18.7 %), the United Kingdom (11.2 %), Switzerland (10.4 %), the United States (7 %), and France and China (both 4 %). Under the new Erasmus+ programme begun in January 2014 with the support of a EUR 14.7 billion budget, more than 4 million Europeans from over 33 countries are expected to have gained study and work experience abroad by 2020.

Finally, as concerns internationalisation by German higher education in the form of setting up satellite and branch campuses abroad, unlike the United States and to a lesser extent the UK, Germany has so far established relatively few universities abroad. However, through DAAD assistance this is beginning to change. In September 2014, for example, the DAAD was involved in opening another new German-Russian university in Tatarstan (Gardner, 2014), adding to a fast-growing list of international institutions worldwide with which Germany is now affiliated. While precise information is difficult to find, there are two German campuses established in China, one in Egypt, one in Oman and one in South Korea (Global Higher Education, 2014).[33] In terms of foreign institutions partnering with German universities, Germany is a strong player. The OECD report, Approaches to Internationalisation and their Implications for Strategic Management and Institutional Practice (Henard, Diamond, & Roseveare, 2012), includes Germany alongside France, China, Spain and the US as the most frequently cited country for partner institutions and as one of the most desirable countries for establishing exchanges, collaborative degree programmes and research partnerships, particularly in engineering.

6.8. The bottom line: significant, multiple and ongoing efforts should have a future — if funding permits

The aforementioned ranking of internationalisation priorities by German stakeholders as revealed in the IAU 2014 global survey (Egron-Polak & Hudson) shows clearly that Germany's higher education institutions prioritise an international approach, increasing student engagement with global issues, developing international cooperation and capacity-building and increasing international networking. These priorities indicate an unambiguous inclination to improve German higher education representation abroad and receive the full support of the four powerful and well-funded players at federal level: the German Council of Science and Humanities, the German Rectors Conference, the German Academic Exchange Service, and the Alexander von Humboldt Foundation. Together, this fusion of federal-institutional perception and enterprise points to a strong set of clearly defined yet distinctly focused goals that indicate a high degree of shared understanding and

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[33] In China: Fachhochschule fuer Oekonomie und Management, Essen (University of Applied Sciences for Economy and Management, Essen); in Egypt: Technical University of Berlin; in Oman: German University of Technology in Oman; in South Korea: Friedrich-Alexander University of Erlangen-Nuremberg.

coordination of key priorities with regard to German higher education and internationalisation. Through the Excellence Initiative, the Internationalisation of Universities audit, and the activities of the DAAD and the AvH, among others, it is clear that significant, multiple and ongoing efforts are well under way. At the institutional level alone, for example, many of Germany's universities already have long and established traditions of international activity and, as noted in the 2010 British Council's Global Gauge (2011), operate in one of the most supportive countries for overseas students. These relationships are growing as the push and pull factors of international mobility continue to evolve, as Europe, and particularly Germany, becomes a more attractive setting as a producer and recipient of global talent.

As a federal higher education system, however, the challenges of financing and managing internationalisation remain. Whereas the Excellence Initiative may advance the pace of internationalisation in promoting top-level international research, creating strategic centres, project management units and international liaison offices, there is currently no clear indication that Excellence Initiative funds will continue beyond 2017, which raises questions about what universities receiving it now will do when the support ends, whether their international activities will be self-sustaining, become reduced, or simply die off and, finally, how non-Excellence institutions will be impacted. The pressure for constitutional reform to promote further internationalisation and make internationalisation funding more stable and permanent will no doubt increase. Large increases in tuition fees, which are normal in the US, the UK and Australia, will not solve funding problems in Germany as taxpayers continue to regard education as a public right and reject the idea of tuition fees for university study (Teichler, 2012).

Apart from financial challenges, other challenges remain and were addressed by the DAAD Strategy 2020 report (2013). These include safeguarding the quality of research, instruction and study; ensuring the maintenance of standards for quality education in the light of increased competition; ensuring that the curriculum and learning experience for students unable to study abroad incorporate elements of internationalisation; opening new and more diverse educational pathways by adjusting the higher education admissions process; taking advantage of novel learning opportunities through new media and innovative technologies; providing the funding necessary for universities to become truly 'global' and create legitimate 'international campuses;' opening the doors more widely to qualified professionals to help redress Germany's declining population; and engaging with newly emerging players in the global knowledge network, like Brazil, China, India and Russia (DAAD, 2013, pp. 21-22). In addition, Germany lags behind in some other frequently employed internationalisation measures, such as the establishment of satellite campuses, or in terms of the distribution of resources to attract foreign talent and increase services or mobility of faculties (some institutions in less urban locations may be far behind). And there seems to be more room for development of virtual mobility, which has not yet made its way into various federal or stakeholder policies.

As international competition in education and science grow stronger, Germany's past success in internationalisation will in all likelihood continue if funding for internationalisation becomes more permanent and is clearly earmarked in Länder funding to HEIs. Similarly, the internationalisation process will benefit from even stronger cooperation by key stakeholders, federal and Länder authorities, but the latter must define measurable quantitative and qualitative goals that are detailed and very closely tailored to individual institutions. The development of systems to monitor the process of internationalisation and the establishment of research chairs for internationalisation could be useful in the evaluation and further development of the internationalisation process in Germany.

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7.   ITALY

Fiona Hunter[34]

7.1. Introduction

This report presents how internationalisation is contributing to Italy's attempts to reform its higher education system by responding to external drivers for change such as the European Higher Education and Research programmes and, in particular, by adopting the action lines of the Bologna process. Italy has struggled to realise changes to its higher education system in response to the new environment principally because it had not undertaken sufficient reform in the previous 60 years. This slowness to reform lies in its history of economic and political instability as well as strong internal resistance from the academic community. It is against this backdrop that the efforts to internationalise both at national and institutional level should be understood. The report highlights where successes have been achieved but also where shortcomings are still evident and require urgent attention if the country and its higher education institutions wish to become players in the European and international arena.

7.2. A slowly evolving higher education system

The Italian higher education system was once composed predominantly of state universities ('università statali') but these now represent only 67 of the 96 universities recognised by the Ministry for Education, Universities and Research (MIUR). There are now 29 non-state universities ('università non statali') of which 11 are distance learning institutions ('università telematiche'), and while recognised and regulated by MIUR these non-state universities are principally self-funding institutions. Typically, they charge higher fees and may also have additional funding sources from their stakeholder communities. They are able to determine their student profile via entrance exams and restricted entry.

7.2.1.   Student numbers

Although state universities now represent only around two thirds of the institutions, they still account for the bulk of the student population with 92 % of 1.7 million students. Only 5.4 % are in non-state universities and 2.6 % in the recently established distance learning institutions. More than 40 % of students are enrolled in the 11 large universities, although numbers are now declining, and 70 % are enrolled at one of the older 26 universities founded before 1945 (ANVUR, 2014). Since 1999, the non-university sector, made up of 137 institutions specialising principally in music, art and dance with 52 000 students, has been integrated into the higher education system, although it is still managed according to different (and at times uncertain) legislation. There is also a small but growing number of high-level specialised schools, operating independently or as part of existing university structures (ANVUR, 2014).

7.2.2.   Graduate trends

Between 1993 and 2012, the traditionally low percentage of graduates in the Italian population grew significantly from 5.5 % to 12.7 %, and in the 25-34 year-old group from 7.1 % to 22.3 %. This is perhaps the greatest success of the Bologna-led reforms of the past decade, although it still leaves Italy well below the EU27 average of 35.3 % for 25-34

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year-olds. One explanation for this phenomenon is the lack of vocational education pathways in Italy (often representing as much as 25 % of graduates in other European countries), but also the inability of the higher education system to provide attractive options to mature students (8 % versus a European average of 17 %) (ANVUR, 2014).

7.2.3.   Falling enrolments

Enrolments at Italian universities have fallen by 20.4 % over the last ten years. This can be ascribed partially to demographic decline, but nevertheless only three in ten 19 year-olds choose to enrol in a university. There is also a significant drop among older students (over 23 years), making it practically impossible for Italy to reach the European 2020 objective of 40 % of graduates in the 30-34 year-old age group. Indeed, Italy is now expected to reach around 27-28 % (Bartoloni 2014). However, it should be noted that Italy is a country with strong regional differences, with an economically stronger and more affluent north compared to the centre and south and this is reflected also in higher education enrolments where most of the decline is in the centre (25 %) and south (30 %) of Italy while the north has lost only 10 %.

7.2.4.   Shrinking funding

The limited successes of the Bologna process reforms and their relation to internationalisation will be examined later in this report but it is evident that reform without resources is never easy. Italian public expenditure in relation to the number of students in tertiary education is 30 % lower than the OECD average. Italy ranks 5th last in the OECD tables for public spending in education and is the only country where real public expenditure on educational institutions fell between 2000 and 2011 and with the most significant reduction (5 %) in public investment between 2005 and 2011 (ANVUR, 2014; OECD, 2014a). The principal source of funding for state universities comes from the Ministry, while non-state universities receive a much smaller contribution, relying mainly on tuition fees as their main source of income. With the onset of the economic crisis, these funds have been cut back since 2009 with a nominal reduction of 13 % and real reduction of 20 %, leading state universities to rely more heavily on tuition fees (capped at central level) or other sources of income. One third of total income is now from private sources (OECD, 2014a). Regional differences again become apparent as enrolment numbers are falling more significantly in the centre and south and where tuition fees are also lower, often by as much as 50 % (ANVUR, 2014).

7.2.5.   Staffing trends

Academic staff are either on a permanent contract as state functionaries or on short-term contracts. In 2013, 95.4 % of permanent academic staff (26 % full professors, 29.6 % associate professors, 44.4 % researchers) were in state universities and 96 % were hired on a full-time basis. Since 2010, the permanent status of the researcher position has been abolished and replaced with a fixed-term contract. 99 % of academics are Italian, and of the 1 % of non-Italians 70 % were European, principally from Germany, United Kingdom, Spain and France (ANVUR, 2014). Academic staff numbers increased rapidly (+28 %) along with the proliferation of academic offerings during the first decade of the Bologna reforms but have subsequently been cut back by 15 % by regulating turnovers and transfers, although there is a growth in fixed-term contracts. Administrative staff numbers are also decreasing. Although numbers are down overall, the percentage of women employed in both academic and administrative positions is growing, although the number of women in academic positions, especially at senior level, is still low (ANVUR, 2014).

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7.2.6.   Research capacity

The Italian research system is made up of both universities and research institutes, which in terms of researcher numbers represent around two thirds and one third of the system respectively. Their research focus is different, with the universities carrying out more basic research and research institutes rarely dealing with disciplines such as humanities and social sciences.

Italian investment in research and development is among the lowest of the large industrial economies, principally due to the low level of private sector funding which is around half the European average. Public funding is also low at around 0.52 % of GDP, against an OECD average of 0.70 % in 2011. The difference in percentage points translates into fewer resources, fewer researchers and lower innovation potential, even though Italy does perform well when compared to the major European countries, particularly given the low level of investment. The recent research assessment exercises confirm that the regional differences apparent in education are also visible in research, with the north being more productive than the centre or south, although there are some exceptions (ANVUR, 2014).

Universities receive lump sum funding for research purposes from MIUR to cover staff and management costs and can also take part in competitive funding calls for both basic and applied research projects. Other resources are made available at local or regional level. National funding levels are down in general and Italy does not appear able to capture European research funds, contributing more than it receives. This can be attributed to the smaller size of the research sector in comparison to the main European countries. Italian researchers also have modest results in accessing European Research Council funds, although interestingly Italian researchers living or working outside Italy are more successful in obtaining grants (ANVUR, 2014).

7.3. European   initiatives   pushing   the   modernisation   and internationalisation agenda

Participation in European programmes and the Bologna process has not only fostered initiatives for internationalisation but has been the driving force behind recent legislation to reform Italian higher education. Italian universities have been actively involved in the Erasmus programme since the start and, consequently, mobility has always been identified as a key means to internationalise the universities.

Italy was one of the four signatories of the Sorbonne Declaration and took the lead in the Bologna process, not only in hosting the first conference in 1999, but in acting uncharacteristically as a first mover in implementing the Bologna reforms (MIUR, 1999), thanks to a government committee that had been working on a reform package in the preceding years. Despite a swift response to the Bologna Agenda, the reforms were not as successful as anticipated: the newly granted institutional autonomy posed many challenges to the universities; there was insufficient government support both in funding and guidance and academic resistance to change was often high, with many either not understanding the international dimension of the reform or perceiving it as interference in institutional affairs. The lack of a communication strategy meant that it was not understood by students nor, very often, by employers.

Despite these many shortcomings in reforming the system, the Bologna process successfully paved the way for new and more diverse forms of internationalisation. Alongside the adoption of the specific action lines, the Italian Government introduced a number of specific measures to further enhance mobility and internationalisation of the

curriculum and research and these have been increasingly embedded in successive legislation for modernisation of the higher education system and in each round of the three-year planning cycles for university development. National policies take inspiration from, and are aligned with, European policies and objectives (in particular, Europe 2020, Erasmus+ and Horizon 2020) and the recently formed national quality assurance agency (ANVUR, 2014) has been developed according to European standards of best practice (ENQA).

Although there is no overarching national strategy, internationalisation continues to take on greater importance in legislation for the development of higher education. This is reflected in the current government's efforts to develop a new set of reform measures for 'la buona università' (the good university) aimed at removing inefficiencies, rewarding performance and opening up the system in an effort to enable Italy to catch up and align with the Europe 2020 strategy.

7.4. National policies for internationalisation driven by the Bologna process

7.4.1. Bologna process as a modernisation tool

After more than almost a decade and a half of legislative attempts to improve the system and align it with European models of practice, recent results appear disheartening. The Bologna reforms asked a lot of Italian universities that had little experience with flexible curriculum design, had difficulties in shifting from a teacher-centred to a student-centred approach, struggled to develop Bachelor programmes that both prepared for the labour market and laid the foundations for postgraduate study, were unable or unwilling to make the transition from a discipline-based approach to a more output-based approach of knowledge and abilities, and were often hampered in any attempts to innovate by bureaucratic constraints.

As a result the higher education system continues to generate high wastage and slow completion rates. Only 55 % of those who enrol in a university programme manage to graduate, and of those who do graduate, only around 33 % of bachelor's and 40 % of master's graduates do so on time. Overall, dropout rates have improved somewhat but are still high, with 55 out of 100 students completing their studies against an average of 70 in Europe (ANVUR, 2014; Bartoloni, 2014; Cammelli & Gasperoni, 2014).

The average length of the three-year bachelor's programme is 5.1 years (70 % longer than the official length) and the two-year master's programme takes 2.8 years to complete, although there are regional differences with the economically stronger north typically faring better than the centre or south of the country. Women appear to be doing better in the system since 59 % of Italian graduates are now female (ANVUR, 2014).

Those who do complete their studies are inevitably older than their European counterparts: bachelor's graduates are on average 25.5 years old and master's graduates 27.8, and in the current economic climate many are forced, rather than choose, to seek employment in the European labour market because of lack of opportunity at home (Bartoloni, 2014). Between 2008 and 2012, unemployment rates rose steeply and the proportion of 15-29 year-olds not in education, employment or training (NEET) rose from 19.2 % to 24.6 %, with only Spain and Turkey faring worse (OECD, 2014). The future looks decidedly bleak for many young Italians and far from the promised scenario of the Bologna reforms of the previous decade.

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7.4.2.   Bologna process as a catalyst for internationalisation

While successive governments have failed to reach the intended goals, implementation of the Bologna action lines has always been accompanied by an increasing emphasis on developing initiatives for internationalisation. Guidance and support on implementation is provided by the Bologna Experts Group who offer a series of seminars to both academics and administrators in line with the objectives of the legislation (www.bolognaprocess.it).

Since 1998, the three-year planning cycles set the objectives for universities and have increasingly included objectives for internationalisation (MIUR, 2001a, 2001b, 2004, 2013). The legislation (DM509/99) that introduced the two-cycle model for higher education in 1999 also required all degree programmes to include the study of an EU language, extended institutional autonomy and recognised study periods, credits and qualifications from abroad. This opened the door to the development of double and joint degrees and this legislation was supported by three rounds of successive funding to encourage their realisation and support mobility of students and staff. In applying for this special funding, universities were required for the first time to declare their strategic objectives for internationalisation (MIUR, 1999).

The programme had a very strong uptake across the sector, with universities developing double and joint degrees at master's and doctoral level, and creating a robust foundation for participation in the European Erasmus Mundus programme. In addition to the existing 138 Erasmus Mundus Joint Masters in which Italian universities currently participate, 9 new Joint Masters have been awarded under the first Erasmus+ call for proposals (Erasmus Mundus, 2014).

Successive programmes for internationalisation have also encouraged the development of academic programmes taught in English aimed at attracting international students and promoting international research collaboration (MIUR, 2001b, 2004). In 2011-12 there were 185 degree programmes (20 at bachelor's and 165 at master's level) offered in English that are formally recognised by the Ministry in addition to 228 doctoral programmes. Moreover, there were 135 professional master's and 123 summer and winter schools that universities can offer independently (CRUI, 2012). Programmes in English are offered at all levels from bachelor's to doctoral studies and span an increasingly broad range of studies from business and engineering to architecture, design, sciences, medicine and even humanities and law.

These new programmes, alongside support from bilateral agreements with a number of countries including China, have increased the international student population at Italian universities, although the numbers are still low in comparison to other European countries. The Italian market share for international students was up from 1.2 % in 2000 to 1.8 % in 2009, with the Marco Polo Programme for Chinese Students increasing from 74 students in 2003 to 5 269 in 2011 (OBHE, 2012). The Ministry has also opened a website - www.universitaitaly.it - that provides information on the higher education system in Italian and English for international students, although Italy does not yet have an agency promoting its higher education system that is comparable to other European countries. 'Uni-Italia' was set up recently and currently operates at Italian Embassies in Brazil, China, Indonesia, Iran, South Korea and Vietnam (Fondazione Cariplo, n.d.).

The Italian higher education system does not set different requirements for international students. They are required to have a secondary school certificate from a legally recognised school in the issuing country and must have at least 12 years of prior schooling. They are then subject to the same entry tests (if required) and pay the same fees. In principle, the

system is very open to international students but there are de facto barriers in the design of entry tests (e.g. knowledge of Italian culture) and difficulties in assessing foreign diplomas (McGrath et al., 2014).

The objectives for the 2013-2015 period also offer for the first time the opportunity to internationalise the academic community by encouraging longer-term academic exchange in double and joint degree programmes as well as short-term teaching contracts for renowned international academics and scholars in standard academic degree programmes (Bruno, 2014). This initiative has the potential to inject significant innovation into the system given that currently 99 % of the academic community is Italian (ANVUR, 2014). In order to enhance research quality, international experts selected with the assistance of the European Research Council and European Science Foundation will also be invited to take part in research assessment exercises aligned with international standards of best practice.

According to the new national funding criteria for 2014, performance measurement will become increasingly important in the quality of teaching, research and academic hiring, with internationalisation as an important indicator. One third of funds will be assigned based on merit according to the ANVUR evaluation, and these will include indicators of Erasmus mobility for both incoming and outgoing students (MIUR, 2014b). Universities are now being required to internationalise in order to receive funding, rather than being funded in order to internationalise.

7.5. A range of stakeholder initiatives

In addition to the programmes for internationalisation promoted by MIUR, there are a number of complementary programmes offered by other key stakeholders. There is little data available on their impact but it is likely that when and where they exist, they are offering more individual opportunity than creating long-term impact at institutional or national level.

Continuous support is provided by the Italian Foreign Ministry (MAECI) in the form of bilateral agreements that offer various funded opportunities for study and research to students and researchers on an annual basis. MAECI also organises a number of other initiatives that support internationalisation in collaboration with other bodies, such as Italian Culture on the Net (ICoN, n.d.) in collaboration with MIUR and a selection of universities to provide a range of courses and degree programmes in Italian language and culture online, or Invest Your Talent in Italy (MAECI, n.d.) in association with the Italian Trade Agency (ICE) and Chambers of Commerce offering English-taught master's in ICT, management and design at a number of leading universities, with merit-based scholarships and placements provided by the Italian Trade Agency and Chambers of Commerce.

The Regional Governments of Italy, as well as being responsible for managing student financial aid, have also provided resources for international mobility of staff and students, including initiatives to attract international students, such as welcome services and language programmes (Regione Lombardia, 2012). The Piedmont Region, in the north-west, has also provided funding to attract international academics to its universities (Stanchi, 2008).

The Italian Confederation of Industry (Confindustria) set up a programme in 2004 to attract Chinese students and scholars, following the model of the Erasmus Programme, providing scholarships for study and research as well as training opportunities (EMN 2013). In 2006 it

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developed its own plan of action for Italian universities in which internationalisation and talent attraction played a key part. In 2011, together with the Italian Rectors' Conference (CRUI), it set up a strategic agreement whereby companies agreed to support internationalisation of universities by promoting English language programmes and funding international visiting professors and 'mobility chairs' to bring back Italians working in universities abroad. (Accordo Confindustria – CRUI, 2011). There have been similar government initiatives but they are often hampered by bureaucracy. A number of banks and companies have also contributed to projects for internationalisation either with the regions or directly with universities.

The Italian Rectors' Conference (CRUI) seeks to make a contribution to the development of internationalisation and to spread best practice through its ongoing efforts in providing seminars (often for support in the implementation of new legislation), setting up working groups, carrying out surveys and undertaking other initiatives also in collaboration with others.

7.6. Institutional strategies for internationalisation: responding to state and market

Since there is no national system for data collection on internationalisation, and only limited data appeared in the ANVUR 2013 report, it is difficult to obtain an overview of institutional strategies for internationalisation. However, a 2012 Bologna Experts Seminar on 'Rethinking Internationalisation' presented results from a survey, organised in collaboration with the Italian Rectors' Conference (CRUI), that captured the state of internationalisation strategies in 37 universities (Salvaterra, 2012).

While the survey highlighted that the majority tended to develop short-term strategies with quantitative goals based on the national three-year planning cycles (e.g. mobility numbers, international enrolments, external funding levels), there were others that developed their own indicators such as partnerships (20 %), foreign-language-taught degrees or joint programmes (20 %), international work experience (20 %), research output (14 %), visiting professors (4 %), outgoing academic mobility (3 %) and academics with international experience (3 %), while others also looked at quality of services, mobility of academic staff and housing capacity.

Mobility remained the principal focus and objectives were: integrating mobility into the curriculum (92 %); international placements (83 %); international research experience (75 %); and intensive programmes (64 %). The focus on the curriculum across the three levels was mainly to develop courses in English (78 %), typically in collaboration with international universities or companies (72 %). The majority (85 %) declared that they were developing mechanisms to recruit students internationally, such as offering scholarships, discounted fees and dedicated support services. Internationalisation of the academic community was also indicated as a priority through visiting professors (69 %) and recruitment of international academics, including Italians working abroad (64 %), but also through encouraging more outward short-term mobility (50 %).

Equally strong was the focus on enhancing research through international partnerships (67 %) and funding (72 %) and also on improving professional knowledge, particularly language competences (69 %). A smaller number set objectives to improve support services (19 %) and build their strategic management capacity (14 %), while a significant percentage planned to participate in international higher education management projects (44 %).

While it is true that the survey provides only a partial picture and indicates intentions rather than results, it does suggest that universities are increasing and diversifying their international efforts. While one third responded that they developed these efforts in response to national legislation, a further third indicated that their strategies go beyond ministerial requirements. This diversity of response suggests that Italian universities are not only responding to national policy but developing their own strategic goals for internationalisation.

Their strategic intentions point to an increase in the number of programmes taught in English, whether on their own or in partnership with other institutions, and enhanced exchange programmes and recruitment of international students. Internationalisation of the curriculum in the Italian context appears to be understood principally as teaching in English or developing joint/double degrees and there is no specific mention made of online learning or virtual mobility. This may be due to an often negative perception of quality at the distance learning universities operating in Italy.

Efforts are being made to internationalise the academic community through stronger use of cooperation agreements and developing creative solutions for longer-term staff exchanges. It would appear that new types of partnerships and alliances are emerging that are stronger and more strategic to institutional goals. While for the majority this means integrated curricula such as double and joint degrees or collaborative short programmes, a small number of universities are spearheading a trend of setting up international operations or even launching branch campuses outside Italy, often in collaboration with local institutions (OBHE, 2012).

So the data suggest that Italian universities are (at last) becoming more international as they choose to align with international practices by teaching in English, recruiting international staff and students and enhancing their international research profile in order to position themselves more successfully. Italy does not currently fare well in international rankings, with only a small number of its universities appearing in the top 200 lists (Schiesaro, 2014).

7.7. Key performance indicators of internationalisation: mobility and joint- and dual-degree programming

The Erasmus programme has been the cornerstone of internationalisation in Italian universities for many years. In terms of outgoing mobility, Italy ranked 4th in 2012-13 with 25 805 outgoing students and 5th in incoming mobility with 19 964 European students, which is just below half the number that choose Spain, ranked first both for incoming and outgoing mobility (European Commission, 2014a, 2014b).

In the period 2008-9 to 2011-12, there was a 32.92 % increase in the number of Italian Erasmus students, with a 10.3 % rise in the last year, even though only 1.51 % of students overall participated in the programme (Silvestri, 2012) (European Commission 2014a, 2014b). Academic staff mobility has also increased with 1 651 taking part in 2011-12, but numbers are low compared to other European countries. Italy attracts more academic staff than it sends, with 176 incoming staff for every 100 outgoing. There is a similar ratio for administrative staff, with 208 incoming for every 100 outgoing, although numbers reached 373 in 2011-12, representing an upward trend (Silvestri, 2012).

There is a trend of progressive growth in the numbers of international degree-seeking students, although Italy is still well below the OECD average. In 2000-1 there were only 5 509 students in the system, accounting for 1.9 % of the population, but by 2013-2014 this number had increased to 69 958 international students, representing 4.2 % of the total student population. The highest percentage (5.49 %) of international students is in master's programmes, probably due to the number of courses offered in English, and overall 63.87 % chose to study in the north of Italy (MIUR, 2014a).

Against this upward trend in international student enrolments, it should also be noted that around 63 000 Italian students enrolled outside Italy in 2011, which was an alarming 51.2 % increase on the numbers in 2006 (Marino 2014). Italy does not do well in attracting international students compared to other countries but it is also losing an increasing number of its own students who prefer to seek a university education elsewhere. 48 % of graduates declare that they are willing to go abroad to find employment and this percentage is even higher in certain disciplines (Cammelli & Gasperoni, 2014).

In 2013-14, 187 degree programmes were offered in English with the vast majority being offered at master's level. There were 167 master's, nine integrated master's (five years) in Medicine and one in Pharmacy, while only ten bachelor's degree programmes were offered in English. These programmes are taught mainly by Italians since only 1 % of staff, as previously indicated, are international, but the planned reform measures aim to facilitate the hiring of international academics not only as a means to enhance the quality of education and research but also to position Italy more successfully in the global rankings.

International degree-seeking students match migratory flows to Italy. 15.73 % are Albanian, 10.21 % are Chinese and 9.72 % are Romanian. At master's level, the highest percentage of non-EU students are the Chinese at 13.87 % and Albanians at 11.01 %. These numbers have grown rapidly in recent years with an increase of 15.97 % since 2009-10, although this trend is slowing down with an increase of only 1.32 % between 2012-13 and 2013-14. (MIUR, 2014a).

When looking at numbers of international graduates, these rose by 54 % between 2008-9 with 6 537 and 10 068 in 2012-13. Over the last five years, there has been a 92.54 % increase in the number of master's graduates (along with a 74.55 % increase in enrolments). Almost half of international graduates come from Albania, Cameroon, China, Iran, Romania and Ukraine. Italy still has low capacity to attract international students compared to other OECD countries (Cammelli & Gasperoni, 2014).

Linked to this trend is the growth of joint, double and multiple degrees. These have grown in ten years from 310 in 2003 to 458. The majority are offered at master's level (267) while there are 89 at bachelor's level, 49 at doctoral level and 53 that are professional master's (60 ECTS). Most of these are double degrees (395) while 27 are multiple and 38 joint. They are offered most frequently in science subjects (284) or social sciences (109) with the remaining in humanities (56) and health (7). The majority of the partners are in the European Union, and most likely linked to Erasmus Mundus funding, but there is a growing number of non-European partners, particularly China (38 %), followed by the United States (27 %) and then Argentina and Chile (both 13 %) and Switzerland (9 %) (CIMEA ProJoint, 2009). While the numbers of integrated curricula and English-taught programmes are increasing, it is not apparent what impact internationalisation is having on the general curriculum in Italian higher education.

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Given the strong concentration of international students in the north of Italy, it is interesting to look at the survey results from the regional industrial association of Lombardy (Assolombarda) on the state of internationalisation at Lombard universities. The 2012-13 report highlighted that 17 000 international students had enrolled at one of the 12 universities in the previous five years, indicating a growth of 42 %. 80 % of these students were non-European. Credit mobility numbers were also up by 22 %, from 4 500 to 5 500, with students coming principally from Spain, the United States and China, while outgoing numbers rose dramatically by 49 % over the same five-year period to around 10 000. International agreement numbers soared to 78 % and 174 double degree agreements and 98 joint doctoral agreements were set up, indicating a growth of 57 %. 160 programmes were set up in English, an increase of 58 % (Assolombarda, 2014; Zoboli, 2006).

Italy has traditionally been a host country for cross-border operations, especially for the United States (Vignoli, 2004). Data indicate that 19 American universities have set up programmes mainly in Florence and Rome (principally for their own students) and that there are six branch campuses in Italy - three American, one French, one Maltese and one Chinese (Cross-Border Education Research Team — C-BERT, 2014). Few Italian universities have ventured outside Italy although two universities, Bologna and Bari, have set up campuses in Argentina and Bocconi Business School has just opened its first campus in Mumbai, India.

7.8. Signs of change but still a long way to go

The recent efforts made by successive governments to internationalise the system have been linked to and inspired by the Bologna process, in a drive to improve efficiency and make the system more competitive and attractive. It is however difficult to promote internationalisation in a system that is still in need of modernisation, although the current Higher Education Minister has declared her commitment to reforms that will 'debureaucratise' and open up Italian higher education. Despite the many challenges they face, it appears that Italian universities are taking active steps to internationalise, albeit to different degrees, and that internationalisation is generating change within the system. While this is encouraging, a more significant intervention at central level is required to ensure that Italian universities are given the right conditions to become strong players in the European and international arena.

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8. The Netherlands

Robert Coelen and Kees Kouwenaar[35]

8.1. Introduction

Higher Education in the Netherlands is characterised by a public-funded binary system of research–intensive universities (RIUs) and professionally- focused universities of applied sciences. The total number of students enrolled in the system is about 700,000 . European programmes have exerted substantial influence on internationalisation. Whilst the quality of the Dutch HEIs and the availability of English- language instruction is high, in terms of incoming and outgoing mobility performance the Netherlands occupies a place in the middle of the European range. Contributory factors to the average performance have been not so much any particular factor, but more general inefficiencies at multiple levels. The recent reawakening of government interest in internationalisation, by spelling out the benefits to Dutch society, have offered new opportunities for HEIs to strengthen their internationalisation efforts.

Good European comparable statistics are vital to monitor what is going on, where to find best practices, and to avoid re-inventing the wheel in different places in Europe. A paradigm shift in our efforts is required, fuelled by the development of more qualitative and embedded internationalisation, to achieve predictable learning outcomes related to intercultural competency and international awareness in order to improve societal benefits from all this activity.

8.2. The higher education system of the Netherlands

The Dutch public higher education system can be described as a binary, principally government-funded, system in which the institutions belong either to the group of universities of applied sciences (UAS) or to universities. The latter group is distinguished from the former by virtue of a significant capitation of funding for research, many masters programmes, and the ability to award Ph.D. degrees. They are also often referred to as research-intensive universities (RIUs). They all belong to the top-500 in ARWU (Academic Ranking of World Universities – a.k.a. the Shanghai Jiao Tong University Ranking). There are in total 54 higher education institutes (HEIs) in the Netherlands; of these 12 are classified as RIUs.

The Dutch HEIs are subject to the rules and regulations of the Dutch Higher Education Act (WHW – BWBR0005682). They are obligatory signatories to the "Code of Conduct for international students in higher education" if they wish to recruit students outside the EU/EEA or Switzerland. Other relevant legislation includes the Aliens Decree 2000 and Chapter B3 of the Aliens Act Implementation Guidelines 2000. Effectively, the immigration authorities generally accept the decisions of HEIs as to the admissibility of foreign nationals as bona fide students. Non-compliance with the Code of Conduct can lead to revocation of the admissibility status.

In 2013 there were 256 949 students and Ph.D. candidates enrolled at the universities (not counting part-time Ph.D. degrees), and a further 440 235 at the UAS, totalling 697 184 students. The status of full-time Ph.D. candidates is mostly that of an employee of the

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[35]   The authors wish to acknowledge their debt to Mr E. Richters, of Nuffic, for providing statistical information
        and advice.

university. There are 43 185 full-time equivalent (F.T.E.) members of staff at the universities (42% non-academic) and 32,323 F.T.E. at UAS (42% non-academic). This leads to academic staff-student ratios of 1:10 at RIUs and 1:23 at UAS.

The quality control mechanism for educational delivery throughout the entire system consists of a cyclical accreditation (at the institutional level and/or programme level) under the auspices of the Accreditation Organisation of the Netherlands and Flanders (DFAO a.k.a NVAO). This is in effect a managed peer-review system. The same organisation has created a special audit procedure to be able to award, inter alia, a special distinction to programmes (or institutions) for having achieved a high level of internationalisation.

Whilst most Dutch HEIs determine the admissibility of foreign students on the basis of prior education and earlier relevant experience with such students, Nuffic is able to assist by providing a degree evaluation service. Nuffic, the Netherlands Organisation for Internationalisation of Higher Education, also has more generalised information about foreign education systems and for some countries also regarding the professional recognition of Dutch qualifications.

8.3. Substantial impacts from European and other supranational programmes

The influence of European developments and policies on the internationalisation of Dutch higher education and research is irrefutable and substantial. The ERASMUS, Tempus, and other programmes have unleashed a growing wave of student mobility since the mid-1980s. The initially strong involvement of academics in student mobility and educational co-operation was seriously weakened by a change from Inter-University Co-operation Projects (ICP's) to the ERASMUS Institutional Contracts. The FP1-7 programmes for research have come to play an ever more dominant strategic role for Dutch researchers. This will undoubtedly continue in the Horizon 2020 programme.

The Bologna process has led to a structural reform in the Dutch HE degree structure that is gradually making a fundamental impact on the substance of higher education. Previously, the bachelor's – master's degree structure was seen as a rearrangement (splitting) of a basically unaltered sequential educational track. Over time these two programmes have come to be understood as fundamentally different educational experiences. The transition from the bachelor's to the master's level is subject to discussion.

The onward march of the globalisation of HE with the attendant exponential increase in international linkages and co-operation, and the inclination towards HE as "education industry" in Australia and the UK (as well as to a lesser extent in Canada, the USA, and New Zealand), has led to unease and discussion among Dutch HEIs and policy makers. The result is at present a variable and inconsistent participation.

8.4. Agenda-setting at the national level

The 2005 Advisory Report of the Education Council of the Netherlands: "Internationalisation agenda for the Education Sector, 2006 - 2011" and the 2013 Report of the Social and Economic Council of the Netherlands (SER): "Make it in the Netherlands", which built on preceding reports of the CPB (Netherlands Bureau for Economic Policy Analysis) and the former "Agentschap NL" are significant reports in terms of their influence on the HE internationalisation policies of the Dutcn government. That tese reports and the recent "Joint International Vision" of the two Dutch university associations (VSNU-VH, 2014) have

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influenced Dutch government policies is reflected in the consecutive Letters to Parliament by the Ministers of Education and Deputy Ministers responsible for higher education.

The 2005 Educational Council Advisory Report can be seen as a broad, agenda-setting document, providing advice rather than setting clear priorities and recommending specific government policy measures underpinned by resources. This advice, aimed at both national and institutional levels, covered: internationalisation of regular curricula; using ICT for internationalisation; development of fully international curricula; continuous international learning tracks; international partnerships and co-operation; international mobility and educational experience; recognition of studies and transparency of educational systems; synergy beyond education: research, culture, economy, etc.; internationalisation of life-long learning; and education export.

In 2007, Minister Plasterk in his "Grenzeloos Goed" letter to Parliament highlighted the contribution of internationalisation to the quality of higher education (HE) and research. His priorities were to increase student mobility, enhance the international orientation of HEIs, promote brain circulation, and improve the operational climate of educational and research institutes.

State Secretary Zijlstra's letter to Parliament (December 2011, May 2012) demonstrates a generally positive attitude towards HE internationalisation, in which the then recent estimations of a net financial benefit to Dutch taxpayers and the Dutch economy played a prominent role. No policy measures or programmes with substantial resources were announced.

The 2013 SER report focused on the economic rationales for internationalisation. It emphasised the economic costs and – larger – benefits of internationalisation and the entry of foreign students. The report indicated that economic benefits would be gained if students formed a lasting attachment to the Netherlands. In addition to net revenues for the Dutch taxpayer, it highlighted the importance of proficiency in the global race for talent: in research specifically and in the labour market more generally.

The 2014 "Joint International Vision" of the Dutch universities focused on three key concepts of international branding, the international classroom, and strategic partnerships. The vision identified necessary steps for individual universities, for the sector, and for co-operation with the government. Specific requests made to the government revealed the sector's priorities: a reduction in regulatory obstacles to transnational education, as well as student and staff recruitment. Its most specific recommendation was to reinstate a substantial Dutch scholarship programme.

Minister Bussemaker's Letter to Parliament (July 2014) enunciated a stronger interest in the personal development of graduates – in knowledge, skills, and competencies – as the driver of HE internationalisation, although the benefits to taxpayer and economy were not lost sight of. More attention was devoted to international/intercultural competencies and internationalisation of the classroom. The minister listened to the request of the Joint International Vision (see above) that a new National Scholarship Mobility Programme (inbound as well as outbound) be established. This programme is designed to endorse the policy of attracting international talent to and giving it affinity with the Netherlands and of giving talented Dutch students more opportunity to study abroad.

8.5. Key stakeholders and funding schemes for education and research

Nuffic, with its foreign representative offices (NESOs s), is a key national player in the field. Over the years, it has evolved from a membership organisation – with government funding – to a national government agency. This has impacted its relationship with the HEIs and it is increasingly aware of its need to recalibrate. Nuffic has been the key administrator of national programmes for internationalisation as well as the government's designated agency for the implementation of international – predominantly European - internationalisation programmes. The Dutch government does not consider Nuffic its key agency for the internationalisation of research, using instead the KNAW (Royal Netherlands Academy of Arts and Sciences) and NWO (Netherlands Organisation for Scientific Research). Over the years, Nuffic has administered Dutch government programmes such as STIR-WO and STIR HBO (promoting the internationalisation of higher education), the scholarship schemes pertaining to various cultural agreements , the Huygens Scholarship Scheme and – in the context of capacity building – NICHE, NPT, SV and MHO (support schemes).

The European Platform (EPF), an organisation particularly concerned with internationalisation at the secondary education level, is merging with Nuffic. This reflects the realisation that internationalisation is a life-long learning objective that starts well before the tertiary level. By strengthening the connection at the level fo the support organisation, new opportunities for dialogue can be created.

Stakeholders other than HEIs, national government, and Nuffic play a limited role in the Netherlands internationalisation arena. The former VSB scholarship scheme was severely affected by the 2007 financial crisis, though smaller scholarship providers are accessible through a Nuffic database. Some local and regional initiatives exist to bring together public and private sector organisations with HEIs in a common international strategy. These include the Eindhoven Brainport, the Amsterdam Economic Board, and the Leiden Bioscience Park.

The connection between Dutch research and education and the EU in Brussels is represented by Neth-ER (Netherlands house for Education and Research). The aim of Neth-ER is to influence the European policy making process in such a way as to ensure that the Dutch knowledge field makes optimum use of European policy and the instruments that Europe has to offer to the Netherlands.

8.6. Institutional policies: considerable action, some evaluation and assessment

Nuffic conducted a study (van Gaalen, Hobbes, Roodenburg, & Gielesen, 2014) into institutional policy on internationalisation in 2014. This study included most Dutch HEIs. Of these, 27 (59%) had a central-level plan, eight (17%) were developing such a plan, whilst seven (15%) did not have a separate central- level plan. Only four of the HEIs (9%) in the study did not have a central- level internationalisation policy. It can be concluded that the penetration of internationalisation in terms of policy is high in the Netherlands.

The motive behind most institutional policies that mention internationalisation is the desire to prepare graduates for participation in a globalised work force or to create global citizens able to interact with peoples from different cultures. International student and staff mobility, international collaboration (research and double degree programmes), and less

frequently, the creation of the international classroom, or internationalisation of the curriculum are among the institutional activities mentioned that are geared to achieving the desired internationalisation outcomes. A number of HEIs participate in capacity- building programmes as part of their internationalisation strategy.

The NVAO has created a mechanism by which HEIs or their constituent programmes can apply for the special internationalisation quality distinction. To be awarded this distinction is therefore the most visible attestation to the fact that significant attention is paid to internationalisation.. Since 2007, a total of 32 programmes at various HEIs, including five RIUs (38%) and nine UAS (24%) have been awarded the special internationalisation quality distinction. In 2012 and 2013 two RIUs achieved this distinction at the institutional level. Many more programmes are preparing to achieve the same status. One HEI is participating in the CeQuint pilot project, an initiative of the European Consortium of Accreditation in higher education (ECA) in 2014, a further step towards recognition.

A more quantitative approach to ascertaining the state of internationalisation of programmes is offered by an instrument, promoted by Nuffic, called MINT or Mapping Internationalisation (Nuffic, 2013a). The tool can be applied at different levels of the HEI (institution, faculty, school, or indeed the programme level). To date, this instrument has not been used very extensively. Clearly, HEIs that spend time on this instrument and the NVAO (CeQuint) special internationalisation quality distinction are intent on making their strategy work in this regard. The majority of programmes have not yet participated in the accreditation or in MINT activities.

At the leading edge of developments in internationalisation are some HEIs that are focusing on developing processes that can demonstrate the effectiveness of the various interventions in terms of achieving measurable learning outcomes. Increasingly, HEIs are investing in the preparation of students for their international mobility, especially by enhancing Internationalisation at Home (IaH) and International Classroom (IC) practices, in order to maximize the benefits of this period. It is expected that as good examples are shared, more HEIs will take this route.

8.7. Key performance indicators

8.7.1. International students

Inbound degree mobility showed (Nuffic, 2013b) a slow increase, both in numbers and proportion, reaching almost 60 000 degree-seeking students (8.8%) in 2013. Forty-three percent were German, demonstrating free student movement in Europe and insufficient higher education resources at home, rather than German students' desire for an international experience. The Netherlands appears to be a more popular destination for German students than German-speaking Austria. China and Belgium are the second and third countries of origin of foreign students in the Netherlands. Clearly, this shows an interplay between both regional and global factors. The dominance of these three countries is slowly declining, creating a more diverse foreign student population. Since 2001, the gender balance of international students favours female students (56%). Changes in legislation in relation to participation in higher education in various EU countries also have an impact on inbound degree mobility.

Participation in both bachelor's and master's programmes at RIUs is balanced. At the UAS, bachelor's degree enrolment predominates. Thus, the vast majority of international students are taking bachelor's programmes (72.8%). Maastricht University is the absolute leader in terms of enrolled international students. It has more than 6 800 international

students, making up 46% of its total student population. Given its location, it is not surprising that the majority of international students are of German origin. Eight of the top ten HEIs, in terms of international student population, are UAS. Their success with international student recruitment is not just because they are close to national borders. Some of these are UAS with disciplines such as Fine Arts, Agriculture, and Physiotherapy in the West of the Netherlands.

Incoming credit mobility is notoriously difficult to track (see below). Currently, Nuffic estimates some 24 000 incoming credit students per annum. This includes about 7 600 students in the context of the ERASMUS programme, in addition to 1 570 ERASMUS internship students. Most credit-seeking students who are funded by ERASMUS come from Spain, France and Germany. The most significant increases in recent times are from Turkey, UK and Finland (17 - 37%). EU data (2011-12) showed 9 892 incoming ERASMUS students. The Netherlands is a popular ERASMUS destination. Dutch HEIs score better than average among Swedish, Finnish, Belgian, Turkish and British students. About 4% of all ERASMUS students come to the Netherlands (cf. the Netherlands constitutes 3.3% of the EU's population and produces 4.3% of the EU's net domestic product). Five Dutch universities are amongst the top 100 receiving HEIs in ERASMUS (European Commission, 2014a).

8.7.2. Outbound student mobility

Figure 10: Outgoing degree mobility
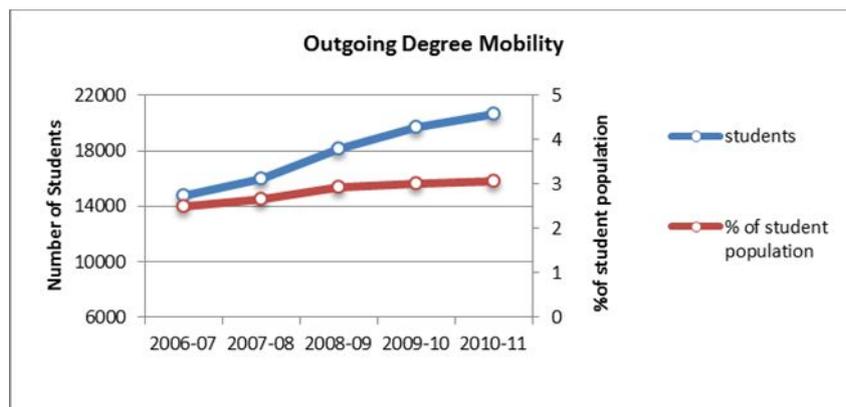
Number and proportion (of total) of students in outgoing degree mobility by academic year.

Outgoing degree mobility also showed a slow increase (cf. incoming degree mobility). In 2011, such mobility applied to almost 20 700 or 3% of the student population. The vast majority (almost 70%) of these went to the neighbouring countries of Belgium, the UK, Germany, and France. Slightly less than 9 % of students went to the USA. Remarkable increases, albeit from a low base, occurred in mobility to Turkey (58%), Poland (35%), Italy (31%), and Norway (25%). Nuffic specifically tracks more than 7 800 Dutch students who retain their Dutch study grant whilst abroad. These can be seen as a proxy for all outgoing degree-seeking students. Almost two thirds of the government-funded students go to Belgium and another 22% to the UK, followed by the USA and Germany. Almost all Dutch-funded students go to 4 countries (96%) and virtually all (95%) stay close by.

In 2011, Outgoing credit mobility applied to about 15% of surveyed Dutch HE students (RIU: 18%; UAS: 13%). Whilst 2006-2008 was a period of slight decline, since then there has been renewed growth (19% in 2012, and 24% in 2013).

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Whilst almost half the credit -mobile students intend to go outside Europe (22% to North America), the reality is that not all carry out their intentions. Sixty-three percent actually stay in Europe. Thirteen percent of the remainder went to North America. Most foreign-credit study occurs during the bachelor's phase (RIU:80%, UAS:89%). Full recognition of credits was reported by 78% of the students, with 8% reporting partial recognition. Almost 10% of students report that they did not receive recognition for their credits obtained abroad. The remaining 5% admit to not having earned credits abroad. This compares favourably with the European data that shows 27% of ERASMUS students receiving only partial recognition.

The EU funding programmes play a crucial role in credit mobility. Almost half (46%) of the students indicated that these were an important resource. University funding was available to 13%. More than one third of students (39%) reported having no funding at all. In 2011, there were 7 392 Dutch ERASMUS funded students. This constitutes almost 3% of all ERASMUS students and 1.1% of the Dutch HE population. This proportion is just above the ERASMUS average (0.95%). Similarly, ERASMUS -funded students as a proportion of the total number of graduates (6.2%) is slightly above the European average (5%). The ERASMUS- funded study duration is less for Dutch students (4.8 months) compared with the European average (5.9 months). Three Dutch universities, including one UAS, are amongst the top 100 sending HEIs in the ERASMUS programme (European Commission, 2014b). According to EU data (European Commission, 2014c), outbound Dutch ERASMUS mobility growth was slightly above the average of 8.3%. Outbound internship mobility (2 861) in 2011 was 1.7 times more frequent than inbound mobility (1 670).

8.7.3.   International staff (inbound & outbound)

Figure 11: International academic staff
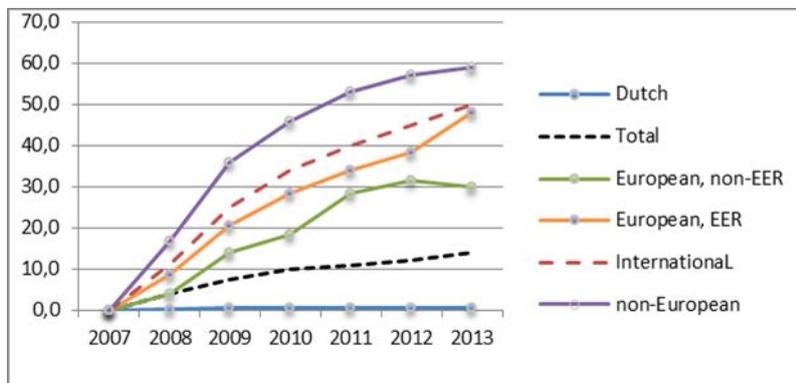
Proportional growth of academic staff in relation to 2007 by nationality.

The Association of Universities in the Netherlands has published information (2014) showing that the percentage of international academics in Dutch RIUs had increased by 50% in the period between 2007 and 2013. They now make up about one third of all academic staff at RIUs. Science, engineering (academics from China and India), and economics are sectors with the highest percentage of international staff. The growth curves were consistent for all categories of academic staff, from Ph.D. candidates (considered to be staff under Dutch law) to tenured full professors. Almost 50% of Ph.D. candidates are international, and 15 - 20% of professors and associate professors. According to research at 4 universities (Sonneveld, Yerkes, & van de Schoot, 2010), about 19% of young Ph.D. graduates go abroad after obtaining their degree. EU statistics show (European Commission, 2013) that in 2011-12, the Netherlands ranked 17th out of 33 countries in terms of mobility through ERASMUS (988 academics). In terms of inbound academic movements, it ranked 15th, with 1 238 academics coming to the Netherlands.

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8.7.4.   European and other supranational programmes

According to EU statistics (European Commission, 2014d), Dutch HEIs ranked seventh in terms of the number of selected ERASMUS Higher Education Co-operation projects in the 2007-2013 period. Dutch HEIs are often project coordinators. They rank third behind Belgium and the UK in numbers of selected projects and second in terms of success rate (46% cf. Belgium 40%).

Dutch coordination of so-called intensive programmes was also above average: 34 IPs, ranking fourth behind Italy, Germany, and France. 900 Dutch students and 338 academics participated in these IPs in 2011. In the same year Germany, Italy, Spain, and Belgium were sending more participants. Dutch HEIs coordinated 21 Erasmus Mundus A2 scholarship projects (2007-2013). The Netherlands was ranked sixth after, among others, Spain (45), France (34) and Belgium (30).

8.7.5.   English as the medium of instruction

In 2012, Dutch HEIs offered more than 1 700 educational programmes with English as the medium of instruction, including 254 bachelor's programmes, 1 151 master's programmes and 109 PhD programmes (Studyportals, 2014). This places the Netherlands 2nd in Europe after the UK. Next in the ranking of countries with the largest number of programmes using English as the medium of instruction are Germany (1 117) and Sweden (752).

8.7.6.   Transnational Education (TNE) campus pperations

According to the Global Higher Education website of the SUNY Cross- Border Education Research Team, there are 210 branch campuses worldwide (Lane & Kinser, 2014). Seven of these were operated by Dutch HEIs – one of them a research university – and there was one USA-based HEI with a branch campus in the Netherlands.

The list of TNE campus and franchised or validated programme providers in the CHE-led report (Brandenburg McCoshan, Bisschof, Kreft, Storos, Leichsenring, Neuss, Morzick, & Noe, 2013) on "Delivering Education across Borders in the European Union" lists 4 international providers of TNE in the Netherlands (from the UK, Japan, and the USA) rather than one, but, erroneously, not a single Dutch HEI offering TNE. Notwithstanding variations in reports, TNE is at this stage, compared with , for example, the UK, not widely practised in the Netherlands. This picture may change as the current Minister for Education intends to abolish the rule that 25% of a TNE-delivered programme must be followed in the Netherlands.

8.7.7.   Capacity building in developing countries

Since the start of the Netherlands Programme for Institutional Strengthening of Post-secondary Education and Training Capacity (NPT), the Dutch government has funded a total of 325 projects in which Dutch institutions (mainly HEIs) supported capacity development in post-secondary education and training in developing countries. Africa hosted 228 programmes, whilst 67 were carried out in Asia, and 30 in Latin America. In addition, a total of 194 so-called tailor-made training courses were conducted, benefiting a more diverse range of developing countries: 75 in Asia, 71 in Africa, 36 in Latin America and 12 in Europe.

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8.7.8.   A need for re-invigoration: a future focus on outcomes assessment and the education-research nexus

The recent re-think of government policy (July 2014) on internationalisation, conducted in collaboration with the sector, is a major step forward in creating an environment in which Dutch HEIs can re-invigorate various aspects of internationalisation. Nevertheless, significant steps have to be taken to move from the managerial quantitative accounting approach (e.g. number of students that are mobile, etc.) to internationalisation that still prevails over a more qualitative approach. In this sense the replacement of the ICP programme, for example, meant that a method of organising student mobility, closely aligned with standard academic practice and with a clear focus on content, was replaced with more centrally organised student mobility that was less informed on academic content.

It should be noted that the metrics for determining the quality of internationalisation (cf. the current quantitative measurements) remain difficult to implement. Whilst the Nuffic investigation on internationalisation policies revealed a very high proportion of HEIs formulating policy, evidence that this has resulted in much activity in the form of accreditation by the NVAO for the special internationalisation quality distinction and participation in MINT is still lacking. Institutional internationalisation strategies are not always good at articulating if, and how, internationalisation activities are intended to improve the core outcomes (graduates, knowledge, knowledge application), how core inputs are to be improved (e.g. money, talented staff & students, reputation/brand strength), or how improvements are to be made to core processes (e.g. curricula, services, networks/alliances) – let alone how such internationalisation successes may be measured or assessed.

It is remarkable that, despite the highest proportion of English language instruction programmes in non-Englishspeaking countries and the demonstrably high quality of Dutch higher education, the proportion of international students, especially from outside Europe, remains relatively low. This has an impact on the ability to achieve diversity in the classroom.

Despite the high number of international academics at Dutch RIUs, regular staff mobility across Europe remains an issue, since remuneration across Europe remains significantly variable and the provisions for retirement are not easily transferred. The universities of applied sciences have considerably lower numbers of international academics and lag behind their research-intensive counterparts.

There is an urgent need for better comparable statistics at the European level for international credit mobility, as data are at present hard to come by. This has a significant impact on the ability to monitor the process and on the formulation of improved policies to enhance such mobility.

Some Dutch HEIs have also embraced the new opportunities provided by the Internet. These include virtual exchange and the creation of programmes in the mould of MOOCs. The extent to which these activities contribute to internationalisation has not yet been determined. Nevertheless, they do ensure that experience is being gathered in the Netherlands on this subject.

Over the last 25 years there has been a considerable advance in the number of activities related to internationalisation. The next 25 years has to see a much greater involvement of academics to ensure that the desired learning outcomes in internationalisation, including intercultural competence and international awareness, are actually achieved by the

activities we undertake. In addition, these changes will enable us to benefit from the spin-offs of a highly internationalised Dutch research environment and the internationalisation of education and student experience. Thus, we must focus our energy on formulating and embedding these outcomes into the programmes we now have. This can only be done if the principal stakeholders in this process, i.e. the students and the academics, are convinced of the benefits of a truly internationalised education.

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9.   Norway

Bjørn Einar Aas[36]

9.1. Introduction

For Norway, a peripheral European nation with a small, open economy, the internationalisation of higher education has been a necessity. Internationalisation policies have emerged from diverse origins and with varying impact, but all have been construed as an integral part of the overall development of higher education in Norway. Norwegian higher education policy has traditionally been the responsibility of the State, whose prime objective was to provide the competence and capacity required for nation- and state-building, industrial development and economic growth, to transform Norway from a colony to a contemporary welfare state. To date, the vast majority of higher education institutions continue to be state -owned and government -funded.

Consequently, internationalisation in Norwegian higher education is characterised by close alignment of policies throughout the sector, making implementation markedly easier and improvements clearly appreciable.

9.2. The Norwegian higher education system

Higher education in Norway comprises 74 institutions of higher education (Ministry of Education and Research - MoER, 2014). These are divided into eight traditional universities, eight specialised university colleges, 20 state university colleges, often referred to as universities of applied science, 29 private colleges; six military institutions of higher education and two law enforcement HE establishments. In addition, two university institutions exist which are jointly owned and operated by a number of universities: the University Centre in Svalbard (UNIS) at Spitsbergen, and the University Graduate Centre at Kjeller (UNIK).

The institutional structure of higher education in Norway has been subject to sweeping changes and reform, most importantly in the first half of the 1990s, when almost 100 local and regional colleges, predominantly in subject areas like teaching, engineering and nursing, were merged to create 26 state university colleges. Recent changes led to a process whereby colleges offering at least four doctoral programmes may have their legal status and names changed from college to university, subject to approval and accreditation by NOKUT, the National Quality Assurance Authority for Higher Education. Students attending accredited institutions are entitled to support from the Norwegian State Educational Loan Fund.

In 2013 Norway had 232 726(DBH, 2014) registered students, with more than 44% (102 680) enrolled at the eight universities, of which the University of Oslo is the largest (26 923 students), followed by the Norwegian University of Science and Technology in Trondheim (21 710) and the University of Bergen (14 451). The same three cities have the largest state university colleges: Oslo (16 526), Trondheim (7 754) and Bergen (6 880). In 2013

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the average number of students enrolled at universities was 10 056, and 3 750 at state university colleges.

9.3. Internationalisation and national policy: Nordic, European and global dimensions

In 1989, a total of 5 144 foreign students were enrolled at Norwegian institutions, a substantial number of whom were from so-called developing countries. In 2002, foreign student numbers had risen to over 10 000, an increase of roughly 100%, signalling a rate of increase surpassing that of the general student population. In part, this may be explained by the implementation of policies originating outside the confines of the sector, but which were nonetheless highly relevant to higher education.

In 1971, the Nordic Countries entered an agreement concerning cultural co-operation (Norden, 2014), the specific objective being to "increase the combined effectiveness of the five countries' investments in education". The agreement explicitly aimed to develop "a mutual recognition of degrees, partial qualifications and other documentary evidence of educational achievement". Hence, the Nordic countries forged close cooperation in higher education, particularly in the field of mutual academic recognition.

In the 1980s, the Ministry of Finance took a keen interest in higher education, thereby be-stowing new political prominence and importance on the internationalisation of higher education. The Treasury directed its attention towards the systemic structural level, pointing to the need to harmonise the national tertiary education system with similar and comparable systems in other countries.

The government's Long-Term Programme for Higher Education for the period 1990-93 stated that it would consider "whether there is a need to assess [....] a harmonisation of the degree system at [Norwegian] universities and colleges with the degree system of other countries, and if the length of studies at both undergraduate and graduate level should be harmonised, in order to bring it more in line with other OECD countries" (ONR, 1989). In the light of later pan-European reforms, it seems the Treasury advocated the Bologna Declaration over 10 years before it was signed! Equally, the Treasury showed a keen interest in the then emerging ERASMUS programme, stating that "until Norway can join [the EU programme] the existing cooperation at the level of universities and colleges must be further developed".

At the institutional level, universities formulated strategies and policies that included the internationalisation of both teaching and research. A global dimension was recognised, deriving from the concept of sustainable development, highlighted for the first time in the report entitled "Our Common Future", by the World Commission on Environment and Development (OCF, 1987), chaired by the then Norwegian Prime Minster, Ms. Gro Harlem Brundtland. Norwegian universities were encouraged to establish cross-disciplinary research centres, and more importantly, to develop and introduce master's degrees with English as the language of instruction.

The Nordplus mobility programme, which was organised and funded by the Nordic Council of Ministers and introduced in 1988, was clearly inspired by the ERASMUS programme of the European Union (EU). At that time, its main aim was to encourage the exchange of students and teachers (MoER, 1997). It has since diversified, with mobility in higher education remaining a core activity, but only one of several sub-programmes. Notably, Nordplus has expanded its geographical scope to "contribute to the establishment of a

Nordic-Baltic educational region" (Norden, 2014). ERASMUS is the European Union's flagship mobility programme in education, established in 1987. The acronym ERASMUS may be read as EuRopean community Action Scheme for the Mobility of University Students. In its present iteration, Erasmus+, the programme brings together seven existing EU programmes in the fields of education, training, and youth, and it will for the first time provide support for sport (EU, 2014).

Norway joined the ERASMUS programme in the academic year 1992-1993, through an independent agreement. In 1994, the European Economic Area Agreement ratified Norwegian membership of the EEA, although in a popular referendum held later that same year Norway voted to oppose Norwegian membership of the European Union.

With the characteristics of game changers, ERASMUS and NORDPLUS stimulated credit mobility through bilateral exchanges and programmes, which diversified and enlarged the Norwegian student population abroad (KYVIK, 2014).

The implementation of the Bologna Declaration (1999) was given a national label; the Quality Reform. The White Paper (MoER, 2001) that outlined the reform advocated increased internationalisation through participation in international programmes and institutional exchange agreements. "All institutions should be able to offer students who so wished a stay abroad as a part of their degree." Norway introduced and implemented the three-cycle architecture of the Bologna reforms. Academic titles in Latin were anglicised and bachelor's, master's and PhD replaced the traditional Latin titles. European harmonisation in higher education became a reality.

A desire to encourage more foreign students from both industrialised and developing countries to pursue higher education in Norway was an explicit part of the Bologna process in Norway right from the start. Governmental priority focused on credit mobility through international programmes and bilateral institutional exchanges, bringing universities and colleges to the very forefront of the development (MoER, 2001). Quantitative goals were not set, but results were soon visible, not least due to the importance that universities gave to outgoing student mobility. Implementation of reforms relating to student exchange and credit mobility were slow to get off the ground, and the ambitious goals were not immediately achieved. To increase the number of incoming students from the 10 000 plus enrolled in 2002 proved particularly difficult. In the five -year period from 2002 to 2007 numbers remained static. Indeed, incoming credit mobility suffered a decline in the early part of this period. An increase in numbers came later, with a 50% rate of increase recorded between 2007 and 2013 (DBH, 2014). In part, this lack of momentum derived from the absence of the administrative and managerial capacity needed to implement the various programmes, but primarily the problem was an initial lack of adequate courses and degree programmes offered in English. The growth of the number of programmes and courses offered in non-Norwegian languages, predominantly English, came later, and has doubled since 2007 to a total of 220 degree programmes (SIU, 2014b) and 4 700 courses, the majority offered at the four oldest universities (MoER, 2014).

9.4.   Historical and contemporary rationales and directions for the internationalisation of Norwegian higher education

Internationalisation, in the modern sense, only became an option in 1811 when Norway's first university, the Universitas Regia Fredriciana, was established in Oslo.Prior to this, students seeking higher education had to do so abroad, in cities like Copenhagen, Rostock and Bologna (ONR, 1989) (Holtermann, 1991). With an institution on its own soil, a process

of domestication of higher education was initiated, serving the "professional needs and ideological demands" (de Wit, 2002) of the emerging national state. Even with increased capacity at home, Norwegian students still went abroad. Technology and engineering were popular careers, and Germany the major destination well into the 20th century (ONR, 1989).

In the aftermath of WWII, capacity building was the catch-word for a new era in higher education in Norway. Higher education was seen as a vehicle to prosperity and welfare, forging the democratisation and massification of higher education experienced in post -war Europe. The country's second university, the University of Bergen, was founded in 1946.

Norway simply did not have the educational capacity to achieve its ambitious goals for higher education within its own frontiers, which made international mobility an integral part of national higher education policy. Consequently, national agreements were entered into with universities in the Nordic countries in fields like dentistry and medicine, as well as with foreign universities, to enable Norwegian students to be admitted to their programmes.

The early post-war policies had immediate and positive ramifications for the internationalisation of the sector, primarily by increasing the number of outgoing students. Throughout the 1960s national educational capacity was developed in most academic disciplines. The University of Tromsø was founded in the watershed year of 1968. One year later a new type of institution was introduced, the regional colleges. They were considered a decentralisation of higher education to regional state counties and medium-sized towns. In 1975, the regional colleges were established as a permanent structure of Norwegian higher education.

In the three first decades of post-war development, studies abroad were recognised as a supplement to national capacity-building endeavours . This was to change, and a first slight but significant shift of emphasis emerged when the Norwegian Council of Universities, in 1961, pointed to studies abroad as valuable input to academic quality (ONR, 2000). The issue of quality thus became an additional rationale for internationalisation.

Further shifts in post-war internationalisation emerged in the next decades, first and foremost in the 1980s. A new awareness of the importance of internationalisation became apparent in national policy development, and internationalisation made substantial advances on the higher education agenda, as attested to by a series of policy documents, mostly public reports and Government White Papers submitted to parliament.

The important changes did not primarily concern Norwegians studying abroad, but foreign students coming to Norway. A seminal report entitled "Borderless Education" (ONR, 1989) which reviewed the "state of the art" of internationalisation was published in 1989. . The scope was now widened to include incoming students. Interestingly, the report devotes a separate chapter to "motives and grounds for internationalisation of higher education"(ONR, 1989). Foreign students were regarded as having a higher academic standard than Norwegian students, and international experience among academics was seen as important to the reputation and status of universities. It was seen as "useful and necessary for as many of its citizens as possible to have the practical experience of having lived abroad for a longer time". The idea of added value, individually and institutionally, was recognised as part and parcel of the motivation to internationalise.

Moreover "Borderless Education" advocated cooperation with universities in the third world. Welcoming students from developing countries was considered important and was seen as

a future cornerstone of the internationalisation of higher education. The idea of solidarity and education for all became an integral part of internationalisation, and the report proposed a new funding scheme for this group of students.

In terms of general mobility, reciprocity of student flows was encouraged and efforts were made to make Norway attractive to a larger number of foreign students. This made internationalisation an issue for all institutions of higher education as a matter of policy and practical implementation, thus generating academic and administrative changes.

The most recent shift in the policy of internationalisation of higher education was launched in 2009 through a White Paper to the Storting (MoER, 2009), the Norwegian national assembly. A holistic and integrated understanding of the concept of internationalisation was introduced to the primary and secondary level of the Norwegian education system, and was no longer the prerogative of tertiary education only. The motivation for this "all-inclusive internationalisation" is reflected in the opening statement of the White Paper: "Future wealth creation requires the skill to compete globally". Similarly, the Government wants "Norwegian pupils and students to be world citizens" (MoER, 2009).

The link to future global competition and the obvious self-interest in national wealth creation is tempered and balanced by the priority given to the United Nations Millennium goal of Education for All. The White Paper points explicitly to the role of capacity building and reform of the education system that made Norway an industrialised country. Hence, developing countries should be given support in their development of educational capacity, sustaining solidarity as an integral part of internationalisation.

9.5. Internationalisation at the institutional level: quality imperatives, funding opportunities, mission alignment

Norwegian universities and colleges are obliged by law to offer education and organise research, academic and artistic development at a high international level (LOV, 2014). Likewise, internationalisation is embedded in the guidelines of NOKUT, the Norwegian Quality Assurance Agency. Internationalisation is also an integral part of the Annual Letter of Allocation from the Ministry of Education and Research; new policies and comprehensive initiatives are embedded in official reports and parliamentary White Papers.

A major feature of the internationalisation strategies is their alignment with the national and general policies for higher education and research. In line with a tradition that precedes contemporary policies, internationalisation has never been seriously challenged, but considered as inherently beneficial and an integral part of a positive, long- term development of Norwegian universities and colleges. Hence, internationalisation is an issue of consensus in Norway.

A study organised by the Norwegian Centre for International Co-operation in Education (SIU) analysed internationalisation strategies and action plans at 36 Norwegian universities and colleges (SIU, 2013). The study shows the approach to internationalisation, how Norwegian universities and colleges deal with their allotted tasks, and finally, how institutions vary in the way that internationalisation goals are formulated, implemented and executed. The oldest and largest universities seem to set goals and develop action plans in line with their historical academic values and research profiles. Colleges tend to fix as their point of departure the goals set by the Ministry.

The study found that quality is the foremost reason for institutions to implement internationalisation policy. What is common for both universities and colleges is a widely-held view that internationalisation co-operation will lead to quality improvement, which in turn will lead to an internationally recognised position in research and higher education. International excellence is seen as a strategic and attractive goal, guiding and shaping institutional policies and efforts. Increased employability of candidates, burgeoning knowledge production among faculty and staff, a position at the forefront of research and new opportunities to recruit talent are the most frequently mentioned quality benefits of internationalisation.

The societal mission emerges as the second most important reason to internationalise. Internationalisation is seen as instrumental for the institution in efforts to solve societal challenges. There is however, a significant difference between the traditional universities and the university colleges. The latter address the needs and challenges from a local and a regional perspective. Universities state their ambition from a global perspective, addressing issues like climate, health and poverty. For institutions in northern Norway, the developments in the Arctic can comprise both a local and a global perspective.

The Norwegian funding system for universities and colleges favours internationalisation, both in teaching and research. The number of incoming foreign students has a positive influence on the State's annual budget allocation to the institutions, as do accredited publishing and credits/study points accrued by students who take exams or graduate. Internationalisation is thus financially rewarded. However, it may come at a price, depending on the internal procedures for distribution of the budgetary rewards (Restad, 2014). Departments or even individual study programmes may be the unit by which mobility is not only organised but becomes an integral part of the unit's financial management, rewards included. If a department has a larger number of outgoing than incoming exchange students, this may produce a "deficit", in the sense that the total tally of study points may be lower than it would have been if the exchanges were strictly balanced. In the opposite case, when the number of incoming students is higher than the outgoing, this may produce a "profit". Either way, exchanges may be discouraged, because of the need for financially balanced spending in departments and within individual study programmes. This may be a more pressing problem for smaller institutions and colleges than for larger institutions with more complex and diversified structures of revenue.

Internationalisation is at the forefront of organised and renewed efforts to enable institutions to attract externally funded projects from EU programmes. Competition for students in a global market is recognised by the traditional universities, whereas colleges are focused on domestic competition for students.

When strategies are translated into institutional policies and action plans, the consistency and alignment with national policies are easily recognised. Both universities and colleges align "closely with national policies". There is a clear emphasis on mobility, internationalisation at home, English-taught courses, institutional cooperation and joint degrees. Norwegian institutions offer research-based education and internationalisation of research is emphasised by participation in networks and by facilitating mobility, as well as by scientific specialisation and concentration.

Development of joint degrees between Norwegian institutions and foreign universities was a national priority of government policy for the internationalisation of higher education (MoER, 2009), but this has not emerged as a broad trend among higher education institutions. There are only 43 such degrees in Norway and 2013 was the first year in which

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all Norwegian universities offered joint degrees. The reason joint degrees are still a challenge may be explained by the high level of procedural and practical co-ordination required between participating institutions, with regard to admission, exams and diplomas (SoA, 2014).

In terms of strategy, Europe, the Nordic countries and North America, Brazil, Russia, India, China and South Africa, and more recently Japan, are increasingly important countries. However, the European Economic Area Agreement and Europe and the EU programmes still have the lead in terms of co-operation projects and external funding. Projects and programmes funded by NORAD (Norwegian Aid) for co-operation with developing countries have been significant at a number of Norwegian institutions. The University of Bergen maintains solidarity links with developing countries and makes development studies and research as a strategic priority, along with the University of Tromsø and Bergen University College.

9.6. Beyond universities: other key actors involved in the Norwegian internationalisation agenda

The Norwegian State Educational Loan Fund is central to the development of higher education in Norway in general and internationalisation in particular. It is also arguably the most important key stakeholder for students. It was established in 1947 to provide financial support through a combination of loans, grants and stipends.

The "Loan Fund" was set up to promote studies abroad that, in Norway, were subject to strict admission limits (numerus clausus). From the mid-1980s restrictions on financial support were lifted and in principle, all fields of study at accredited institutions abroad were eligible. In effect, global grant portability was introduced, permitting Norwegian students to study almost wherever they want. For the academic year 2014-2015 the maximum amount including loans and grants to cover living costs and tuition fees is EUR 25 754 (NOK 218 283)

The growth in numbers of Norwegian students studying abroad led to the establishment, in 1956, of the Association of Norwegian Students Abroad (ANSA). ANSA has developed into a larger organisation, principally responsible for the following: an information centre on international education for Norwegians, a student welfare organisation abroad, and a student union promoting the interests of Norwegians studying abroad. With headquarters in Oslo and a staff of 13 full-time employees, ANSA has 10 000 members and 500 elected volunteer representatives in 90 countries (ANSA, 2014). ANSA receives annual funding from the Government (MOER, 2014).

The Norwegian Centre for International Co-operation in Education (SIU) was established in 1991 by the Norwegian Council of Universities and the University of Bergen at the request of the Ministry of Education and Research (SIU, 2002) to co-ordinate the various governmental initiatives and programmes. Originally catering to higher education institutions only, the centre has expanded its activities and responsibilities and has assumed the function of being Norway's official agency for international programmes and education-related schemes. It is commissioned by several national and international public organisations to administer programmes at all levels of education. SIU promotes Norway as a destination for higher education and research, and provides information and advisory services within the field of internationalisation in education (SIU, 2014a).

NOKUT, the Norwegian Agency for Quality Assurance in Education, is the controlling authority for educational activity at all Norwegian universities, university colleges and institutions offering accredited higher education programmes. The Agency was established in 2002 as a result of the Quality Reform, and is engaged in the accreditation of institutions and programmes as well as in the evaluation and recognition of individual students through an alignment of Norwegian and foreign higher education (labelled general recognition). NOKUT offers a "turbo assessment" for employers considering job seekers with qualifications from higher education institutions in other countries (NOKUT, 2014).

9.7. Norwegian internationalisation in figures: student mobility and foreign-born faculty

In 1951, 22% of the total Norwegian student population studied abroad, a circumstance never seen since, in relative terms. In absolute numbers this percentage translates to 2 000 Norwegian students following studies abroad that year.

National policies and ambitious goals for the growth of higher education had immediate and positive ramifications for the internationalisation of the sector, primarily by increasing the absolute number of outgoing students, but not the share of Norwegian students enrolled at universities abroad. With greater education capacity at home, the relative number of Norwegian students studying abroad decreased, reaching a low point of 5.2% (3 200 students) in 1972. This heralded a period of prolonged stability in terms of the percentage of Norwegians studying abroad. In 1980 and again in 1990 the relative number of students abroad was slightly above 6%, (4 500 and 7 900 students respectively) (SSB, 1972) (MoER, 1997). Until the beginning of the 1970s, institutions in Western continental Europe received the largest share of Norwegian students abroad. This was to change later when institutions in English-speaking countries became increasingly dominant (Wiers-Jenssen, 2008).

In 2013, a total of 24 000 Norwegians studied abroad. The number of exchange students has seen steady growth, up from 4 700 in 2002 to more than 8 000 in 2013, an increase of over 72% (DBH, 2014). The number of degree-seeking students has been stable, with only some minor fluctuations. The annual proportion of students abroad, degree and credit mobility, has been around 10% of all Norwegian students, with degree mobility accounting for roughly 7% and credit mobility 3% (DBH, 2014).

Within the Bologna Process, the 2009 Leuven Communique says that "In 2020, at least 20% of those graduating in the European Higher Education Area should have had a study or training period abroad". This is re-confirmed in later communiques. The "2014 - State of the Art in Higher Education" annual report from the Ministry of Higher Education, records that Norway achieved this major goal of the Bologna Process back in 2010. However, there has been a slight but appreciable decline in this figure according to the data from the academic year 2012-2013 (SoA, 2014). The figure is calculated by SIU, using statistical data from the Norwegian State Educational Loan Fund and the Database for Statistics on Higher Education (SIU, 2014c).

Statistics for 2013 show that for degree students, Great Britain, Denmark, the United States, Poland and Australia are the most popular destinations. For credit mobility, the United States was most popular, followed by Australia and Great Britain. Moreover, studies in technology and engineering show a significant growth (SIU, 2014c). There are, however, interesting differences between these two categories. Four out of five (80%) degree students choose a European country as their destination. Exchange students travel more

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widely. Europe and the USA and Canada are the largest recipient countries, whereas Africa, Asia and Latin America are less popular destinations (SIU, 2014c).

At national level Norway has managed to balance numbers of outgoing and incoming exchange students. However, there are notable geographical imbalances. Asia is the only world region with a balanced exchange with Norway. There are more incoming European students than Norwegians on exchanges with institutions in Europe. In the case of Oceania, Africa and North America, the opposite is true: more Norwegian students choose to study in these destinations than students choosing to come to Norway (SIU, 2014c).

In 2007, 5 400 foreigners were employed as researchers in Norway. In the same year 2007, 17% of academic staff at Norwegian universities and colleges were from abroad (Olsen &Sarpebakken, 2011). In 2009 the proportion had increased to 22%, indicating a significant trend in the internationalisation of higher education. Germany and Sweden were the two largest countries of origin, followed by the USA, Great Britain and Denmark. Numbers of incoming staff from Germany and China increased to the greatest extent over the period from 2009 and 2010. At universities, 45% of PhDs were born outside Norway. Among tenured professors, 19% were non-national. In other categories, (associate professor, assistant professor and lecturer) the proportion was lower and increased by only one percentage point, to 9%, in 2009. Mathematics and natural science have the highest share (35%) of foreign faculty, followed by technology (30%) and agriculture and fisheries. The lowest share was seen in the social sciences (14%).

9.8. A supportive state, a receptive university community, a realistic agenda

Norwegian internationalisation was, from its very origin, an integral part of the HE system and of HE policy. The prime objective was to provide competence and capacity for state-building, industrial development and economic growth, thereby transforming Norway from a colony to a contemporary welfare state. Internationalisation, as quality development, was introduced by the sector itself, and was later to become official government policy. Ideologically, solidarity was made an integral part of internationalisation of higher education. Later, the Bologna Declaration resulted in systemic reform and international harmonisation with neighbouring countries and Europe.

Three elements have shaped the development of the internationalisation of higher education in Norway. First, an active State, which from an early stage included studies abroad as an integral part of Norwegian capacity building, developing a system for internationally portable loans and grants for Norwegians studying abroad. Second, Norwegian universities and colleges responded quickly and positively to new initiatives and developments and aligned their institutional strategies with national and later international policies. Administrative and managerial efforts were professionalised and a wide range of courses and programmes in English were established to attract foreign students to Norway. Third, internationalisation is a realistic option for Norwegian students. Norway has transformed itself from a country primarily sending students abroad to study to one attracting foreign students.

10.   POLAND

Justyna Giezynska

10.1. Introduction

Poland is a country of roughly 38 million people. Of 1 549 877 students (Główny Urz d Statystyczny, 2014, p.61) about 2.3% are international. Although the number of international students in Poland has more than doubled in the past 10 years, this number is small considering the fact that internationalisation is largely equated with student mobility. Often perceived as the goal and not as a means to an end, the role of internationalisation in the development of higher education, science and society in general is not well understood, although Poland has effected significant change at the cultural, social and economic level. This could be related to the fact that Poland has no national internationalisation strategy and only a small number of regional strategies. In contrast, significant progress has been made in other countries and in individual HEIs in other parts of the world in terms of their approach to internationalisation.

In Poland, individual institutions have been slow to adjust to the fast pace that internationalisation requires, and governance, management and financial obstacles have further clouded the issue. Currently, the driving force of internationalisation is HEI middle management, who work with international issues on a daily basis. But their efforts will go unnoticed if they are not supported higher up in the institutional structure. A major obstacle to internationalisation in the Polish higher education system is the very large number of institutions themselves, each of which is fiercely independent, and the large numbers of people in positions of power who wish to remain there. Nonetheless, significant changes are bound to take place: there is a gradually encroaching generational change as the post-communist generation comes of age.

10.2. Internationalisation – the Polish point of view

In Poland, internationalisation is understood mainly as short-term student mobility from the European Union into Poland and international recruitment for full -cycle studies from non-EU countries. Internationalisation is sometimes seen as international partnerships or joint projects. It is almost never perceived as the application of an international perspective to taught subjects and research or intercultural communication on campus through processes of internationalisation at home. As it is today, internationalisation began with the arrival of the Erasmus programme in Poland in the 1998/99 academic year (that is 5 years before Poland entered the EU) but mobility of students, academic staff and scientific knowledge has been present much longer. In post- WWII Poland, the international exposure of students, faculty and the entire higher education sector was severely hampered by communist regime restrictions. International contacts were limited to interactions with HEIs within the Soviet bloc, with few notable exceptions: 1) the Polish-US Fulbright Commission, present in Poland since 1959; 2) the British Council in Poland, present since 1938; and 3) the DAAD, which has maintained close relations with Poland since 1958, opening an office in 1997. Arguably, the Erasmus programme has had the most significant impact on the internationalisation of Polish HEIs, not only in terms of mobility.

Internationalisation implies a major shift in thinking wherever it is applied, and it is important to paint a broader picture, to include the general cultural changes resulting from the breakaway from communism; the massification of higher education associated with

changes in the law; shifts in organisational models and changes in management within institutions. At the same time, what has not changed must also be considered as equally influencing the process of internationalisation of higher education in Poland.

10.3. The higher education system in Poland: the past and the present

Students pursue their studies at 436 state-accredited institutions of higher learning (HEIs). 419 are under the jurisdiction of the Ministry of Science and Higher Education, ten under the Ministry of Health, five under the Ministry of National Defence and two under the Ministry of Internal Affairs. There are 124 public HEIs and 295 non-public ones (POL-on, n.d.), offering education up to master's level (higher vocational education) or including PhD programmes (universities offer programmes in at least ten disciplines, polytechnics in at least six and academies in at least two).

The seemingly spectacular educational choice cannot conceal the fact that Polish HEIs experience a number of problems. Hierarchical, bureaucratic organisational structures, nurtured to be so in the past for easier control by the communist state, are still slow to change. At the same time, HEIs today fiercely guard their autonomy from the state and frequently reject even good solutions or advice. Under such circumstances the quality of HEIs and of the learning outcomes cannot be improved and in many cases is declining. Given the events of history and responses to those events, the current situation is not surprising. After World War II, Polish education was highly centralised and entirely publicly-funded. Focused on reducing illiteracy, the entire curriculum was based on Marxist-Leninist ideology (Nuffic, 2012) and institutional control was exerted by maintaining a rigorous hierarchy. At higher education level all international contacts were tightly controlled by the regime, both at the institutional policy level and at the individual faculty and student levels. As the former political regime began to disintegrate, its grip on the nature and form of academic international interactions loosened and in 1989 the country as a whole was opened up to international influence in various fields. With the 1990 Higher Education Act, Polish HEIs were permitted to offer studies in a two-cycle mode: the first cycle – undergraduate professional studies and second cycle – uniform master's studies; the third-cycle includes postgraduate master's studies and doctoral studies. (When Poland signed the Bologna Declaration in June 1999, it had already adopted the two-cycle system.) Importantly, the Act made private education possible at each level of education. Institutions were gaining autonomy, yet their structures had not modernised quickly enough to allow HEIs to enjoy that autonomy responsibly and effectively. Newly created HEIs were often built quickly, and with strictly commercial gains in mind. As a result of the HEIs' inadequacies, the system continues to struggle with frequent failings, including mediocre research, didactics and educational outcomes.

10.4. Quality of higher education and the role of internationalisation

The very large number of HEIs to emerge in Poland after 1989 have provided unprecedented access to higher education as well as a promise of a better life in the new, post-communist reality. The demographic high of the 1990s further spurred the development of HEIs but compromised quality. This was and in many cases continues to be evident in overcrowded classrooms and substandard teaching and research. A major shortcoming is the largely outdated style of teaching and programmes not adapted to 21st century needs and reality, with little practical application of knowledge. Currently, quality issues are most pressing and HEIs, together with several government bodies, struggle with this problem in both public and private institutions. As globalisation reaches even the

remotest regions of Poland, strategic internationalisation of higher education institutions becomes an aide to sustainability and development.

Although internationalisation has been talked about in terms of aspirations toward better quality in higher education, it is not explicit in the activities of quality-controlling bodies. The most important of these bodies is the State Accreditation Committee (Pa stwowa Komisja Akredytacyjna - PKA). The PKA was established in 2002, with responsibility for making judgements and monitoring the quality of all types of education. It assesses new HEIs before they are open to the public, new faculties within existing HEIs, as well as new study programmes at all levels. The PKA is responsible for the verification of quality within existing HEIs and their individual programmes. It visits all institutions once every five years. The PKA, following a meticulous review of the quality of the facilities and education provided by an HEI, can suggest to the Minister of Science and Higher Education that a study programme or an entire institution be closed down if the improvements it has suggested have not been implemented. The PKA's control was recently tightened in an effort to improve quality and many HEIs are now closing or merging for for that reason and on economic grounds. In its questionnaire, the PKA asks HEIs to describe who gives foreign accreditation, what their mobility statistics are and how international co-operation is affecting teaching and learning (Polska Komisja Akredytacyjna, n.d.). The questions do not go deeper but the PKA, when making its personal visit, can ask appropriate in-depth, follow-up questions.

Other quality-control bodies are the Ministerial Committee for Evaluation of Scientific Units, which controls the quality of educational programmes and is composed of representatives of the scientific and academic community, including students (Ministerstwo Nauki i Szkolnictwa Wy szgo, n.d.) and the Main Council for Science and Higher Education. The latter monitors higher education quality standards and provides recommendations to the Minister as an independent body, including recommendations concerning components of the National Qualification Framework with respect to higher education.

Although international aspects of higher education are mentioned in documents issued by the aforementioned bodies, comprehensive consideration has yet to be given to the relationship between internationalisation strategy and improved quality in higher education.

10.5. Internationalisation at the national level: diffusion of responsibility, with a new national strategy soon to be unveiled

At the Ministry of Science and Higher Education (MNiSW) there are at least three departments working with international issues: the Department of International Co-operation (promotion of higher education abroad, international partnerships and student mobility, internationalisation strategy development); the Department of Innovation and Development (gathers data on internationalisation of Polish HEIs); and the Department of Higher Education and Control (quality and legal regulations). Responsibilities related to internationalisation are dispersed throughout the Ministry and no one person or office has overall responsibility for internationalisation policy.

As the Ministry struggles with the aims and means of internationalisation, the emphasis continues to be on student mobility. The concept of internationalisation at home is entirely foreign and there have been no attempts to use internationalisation to improve the quality of teaching and learning at national level. From interviews at the Ministry, there is clearly an awareness of the issues related to HEI governance and management, and of both in

relation to internationalisation, but at present the Ministry is not able to propose or enforce change beyond what it has achieved to date (Ernst & Young Business Advisory, 2010). Moreover, there has been no in-depth debate on either the value of internationalisation (at the Ministry or elsewhere) or the relationship of higher education outcomes to business and industry.

Importantly, however, there are signs of change. The Ministry has launched POL-on, a data-gathering system, which as of October 2014 has been requiring HEIs to produce new and more comprehensive information: number and origin of students, scope of international co-operation, qualitative data on consortia and bilateral co-operation. We know now that from 2016 the GUS (Central Statistical Office of Poland) will no longer be responsible for data collection in the area of higher education and that this role will be taken over by POL-on. Ultimately, data from the POL-on system will provide the basis for the distribution of public funding to HEIs. (At present, the GUS remains the most reliable source of information, but its public reports are issued on an annual basis – POL-on will report on demand but access will be restricted). This fact is significant because HEIs have been reluctant to gather and present information and now are obliged to do so. Individual universities and HEIs could be a major source of information about internationalisation but access to their data is highly restricted, and data collection has been uneven. The question remains how the Ministry will use this information and how it will translate into policies of internationalisation.

Various other bodies collect data which includes data on internationalisation but currently there is no separate government agency, apart from the Ministry itself, responsible for internationalisation, even though the MNiSW has had plans to establish one since 2008 and has been pressured to do so by the Conference of Rectors of Academic Schools in Poland (CRASP). The Ministry explains that it is unable to provide appropriate funding but it seems that the matter is more complicated and is politically sensitive, as many institutions could claim competency for internationalisation. For example, the governmental Foundation for Education System Development (FRSE) is an agency managing European funds for all levels of education; the BUWIWM is an agency working on credential evaluation and scholarships (but only for students of Polish origin or wishing to study in Polish, or for Polish scientists); and the non-governmental Education Foundation Perspektywy is the largest organiser of education fairs in Poland and its activities include the promotion of internationalisation and in 2005, it established a Study in Poland programme (Study in Poland, 2014) together with the CRASP and the then-Ministry of National Education and Sports.

Gradually, the Ministry has distanced itself from the increasingly commercial Perspektywy (HEIs have to pay to participate in the programme) but at the time it was the only comprehensive project informing the international community of study opportunities in Poland. Recently, the Ministry, in partnership with the CRASP, has been developing its own promotional programme, known as the Ready, Study, Go! Poland project (Ministry of Science and Higher Education, n.d.) and the FRSE implements this international higher education promotion programme on its behalf. The Ministry has recently established a system of incentives (about 100 million PLN) to encourage more HEIs to promote themselves abroad. It can no longer be said that the Ministry is not providing any funding to improve the visibility of Polish higher education abroad.

However, it remains to be seen whether the aforementioned incentive has been properly designed as single initiatives may have limited impact in the absence of a coherent strategy on internationalisation: a strategy that includes the internationalisation of science, research

and teaching and goes beyond student mobility. Poland is obviously obliged to follow the European Commission's directives on internationalisation (EUR-Lex, 2013) and internationalisation features in a Study of Human Capital in Poland document (PARP, 2011). The topic has been gaining importance in the past two to three years as Poland's authorities have been placing more emphasis on the position of Poland in the European and the global economy. This change in thinking is revealed in public announcements from the Minister of Science and Higher Education, in the increasingly more coherent Ready, Study, Go! Poland programme, and in recent plans to establish a series of training opportunities for HEIs on basic internationalisation strategies. As the Minister has said in an interview for this report, the Ministry of Science and Higher Education has been working on a national strategy and plans to unveil it later this year. So far the potential stakeholders have not been called for consultations.

10.6. Internationalisation at the regional level—varied approaches, and levels of engagement, by cities and regions

Poland can be divided into several large student centres. Some regions have taken the initiative to promote their local area to foreign students. Local governments and local HEIs have co-operated to reach out to foreign students looking for long-term and short-term study opportunities within European programmes and who are interested in learning more about the city and region where they will study. For example, Krakow City Council has a programme with seven universities (Study in Krakow, n.d.); Wroclaw local government has an initiative administered jointly with participating universities (Study in Wroclaw, n.d.) and directed at Eastern European students (mostly Ukrainians and Belarusians); Lublin City Council (n.d.) and Poznan City Council (n.d.) have region-wide promotion projects. Poznan is thinking comprehensively about internationalisation and does have a strategy of internationalisation, which was initiated by the Adam Mickiewicz University of Poznan (the only HEI in Poland which has a separate institutional internationalisation strategy). Although one might assume that these projects are a part of a larger regional internationalisation strategy, only Lublin has made it very clear that international students are important to the region and it went as far as publishing a strategy on how to make the city and the region more international. Moreover, one regional initiative has been operating without the support of local government or authorities, namely the Silesian University Network (n.d.). The network provides information about nine public higher education institutions from Silesia and what they offer the Erasmus exchange student. Notably, the capital city of Warsaw (1.7 million inhabitants) and the Tri-City of Gdansk, Gdynia and Sopot (Trójmiasto) with 750 000 inhabitants are large student agglomerations, which have neither garnered local government support nor worked out an initiative to get regional HEIs to actively support – or promote – higher education internationally.

10.7. Internationalisation at the institutional level: substantial progress and future opportunities, set against contextual and resource limitations

Without state assistance, HEIs are making progress in internationalisation. They build international partnerships and actively seek foreign students. With the change of the political system, the number of science-related international partnerships began to rise, providing an opportunity for the internationalisation of research and its outcomes, and continues to do so. For example, the CRASP has recently initialled an understanding on trilateral cooperation with the German Rectors' Conference and its Ukrainian counterpart. Foreign student and staff numbers continue to rise: in 2013, 91 HEIs had international students and staff in comparison to 50 HEIs in 2011 (Perspektywy, 2013).

In the early and mid-2000s, in anticipation of the downward wave of the demographic high, several HEIs began to reach out to international students and to encourage full-cycle study enrolment. Frequently, one successful programme has resulted in increased interest in internationalisation, for example at medical universities. Medical degree programmes have a special place in Polish higher education internationalisation as they have managed to attract more international students to Poland than any particular programme to date. Also, technical subjects are becoming increasingly attractive to international students as Poland is internationally renowned for engineering, and technical programmes are well-perceived as a result. Many of these programmes came into existence thanks to the engagement and foresight of leading scholars who understood the value of the programme beyond the domestic audience.

Private HEIs, having a better understanding of the market and its needs and a more manageable administrative structure, with a shorter decision-making process, responded more quickly to the demand for certain programmes than the public universities. Private HEIs decided sooner than public HEIs to initiate programmes delivered in English and to actively seek out international students, thus contributing to the internationalisation of Polish higher education. Soon afterwards, public universities began to offer short-term mobility opportunities to students from the EU. This sparked non-Polish programme development and, out of necessity , a greater openness to international perspectives. Nowadays, programmes in English are offered at 57 HEIs (both public and private): 37 offer bachelor's programmes and 27 master's programmes. There are 133 programmes taught in English at bachelor's level, 218 at master's level and 14 MBA programmes in English at 10 HEIs1. There are programmes in other languages as well.

To begin with, Poland was not administratively prepared to receive non-EU nationals as students: for non-EU students there was no student visa as such and students encountered difficulties in receiving entry visas. HEIs[37] were not prepared, administratively or otherwise, to assist foreigners in adjusting to their new environment. Local communities had no knowledge of how to accept and assimilate incoming students. And the Ministry did little to make life easier for the more progressive HEIs, which slowed the pace of progress still further. For example, to set up a programme in a language other than Polish (usually in English) HEIs had to deliver in-class training that equalled the same number of hours as the corresponding programme in Polish (the programme in English had to mirror its equivalent in Polish). Programmes designed for foreigners were usually adapted to international standards and had fewer teaching hours than domestic ones. Having an English-language programme of the same length as its Polish counterpart considerably increased the costs in terms of lecturers' and professors' fees and was not economically viable. This has now changed and these impediments no longer exist: HEIs must ensure that their programme is of appropriate quality regardless of the number of hours spent in the classroom. Other aspects have also changed, such as the issue of student visas. Students who receive a student visa are now able to work (although it is still difficult for students to obtain the Schengen visa; Polish consulates frequently reject visa applications from candidates who have already been vetted and recruited by a higher education institution). In addition, local communities are more accustomed to foreign students and understand better their economic value, whilst still making adjustments for the cultural and ethnic diversity of newcomers.

Initially, HEI leadership was in many cases the only driving force behind the decision to internationalise. Today, international office heads and staff, as the IAU survey clearly

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[37]   The data is based on own reasearch and is current as of January 12th 2015.

showed, actively support internationalisation in Poland (Egron-Polak & Hudson, 2014). These leaders, although not at the top of the managerial structure, are experienced in the international arena and have a global mindset; they have travelled, studied and worked abroad, they are at ease with international networking and understand the effects of globalisation on work and life.

Notwithstanding, relatively few Polish HEIs have enthusiastically embraced internationalisation; for the majority, both public and private, it is a cumbersome process costing much and delivering less than expected. Problems affecting the status quo of internationalisation are a result of inadequate institutional management, deficiencies in the international exposure of academic staff and underinvestment due to changes to financing schemes. If internationalisation is to be included in an HEI development strategy, a careful analysis of the design, delivery and administration of education programmes and their content is required, together with efforts to promote student and staff mobility, and schemes to support the international position of Polish science and research and international co-operation projects. Many HEIs are not able to undertake such in-depth analysis and are also not ready for internationalisation in terms of vision, management and financing.

When asked to provide reasons for internationalisation in an IAU survey, most HEIs of the 47 reviewed understood the importance of internationalisation for their development. In particular, they referred to the current decline in student numbers in higher education – a demographic low. At the moment, the size of the student body equates to roughly 4.6% of the overall population. There has been a steady decline in the number of students since the peak in 2006. In only six years, the number declined by 9.7%. In 2011 alone, this number fell by 4.2%, which can be attributed to a decrease in the population aged 19 to 24. Although the demographic low in this age group shows a decline in numbers of students, the overall gross enrolment ratio continues to grow rapidly. The gross enrolment ratio has been increasing since 1990/1991, rising from 9.8% to 40.6% in 2011/2012.

10.8. Mobility and partnerships

According to data from the Foundation for Education System Development, the increase in incoming and outgoing student and academic staff mobility has been noteworthy: there was an eleven-fold increase in outgoings between 1998 and 2013 (from 1 426 to 16 221) and 48 times more incomings (rising from 220 to 10 772). Over the same period, the number of HEIs with an Erasmus Charter increased over sevenfold; in the 2012/13 academic year approximately 75% of Polish HEIs (324) with Erasmus Charter partnerships sent their students abroad and received European students for short-term studies in Polish, English and other languages (FRSE, 2014). The most popular destination countries included Spain, Germany and Italy. Polish HEIs hosted over 42 000 international students visiting Poland for short-term studies from Spain, Turkey, Germany, Portugal and France. Similarly, staff mobility increased within the European mobility programmes: Poles left to teach abroad in numbers ten times greater than in 1998 and HEIs received six times more international staff than in 1998. Staff mobility is relatively small due to low English proficiency among Polish academics, the high costs of living in Western Europe (as a preferred destination) and job insecurity.

In 2013/14, the total number of international students is quoted at 35 983 (Główny Urzد Statystyczny, 2014, p.123) including both short- and long- term stays. 62% foreign students attended public HEIs: universities (24% in comparison to 38% in the previous year), technical universities (9.8% - no change), academies of economics (22% in

comparison to 15% in the previous year), and medical universities (15%, a drop of 3% in comparison to the previous year). Students arrived for full-time studies from outside the EU area from: Ukraine (6 321), Belorussia (2 937), Vietnam (197), USA (970), Russia (612), China (565), Taiwan (533), Canada (470), Turkey (411), Saudi Arabia (387), Kazakhstan (381), India (215) (Ministerstwo Nauki i Szkolnictwa Wy szgo, 2013).

The MNiSW does not record how many Polish students choose to leave Poland and follow a full-time degree programme abroad. Data produced by the Ministry is only reliable in terms of global numbers of students and graduates with bachelor's or master's degrees. No data is available concerning what students do after completing their bachelor's or master's studies and there is no information to indicate the numbers or destinations of students who go abroad. Consequently, the government lacks fundamental knowledge about why students leave and what would keep them in Poland and the opportunity to improve the system, to enhance the educational programme on offer and positively influence the Polish economy and Polish society, is lost. Top destinations for Polish students earning a degree abroad can be gleaned from destination country statistics and other compilations but not from Polish records. The top ten study destinations in 2012 were: Germany (9 238), UK (8 316), France (2 809), USA (2 244), Austria (1 871), Italy (1 274), Denmark (616), Netherlands (486), Switzerland (454) and Spain (438) (UNESCO, n.d.).

Digital learning and virtual mobility play a minor role in internationalisation. Only a small number of HEIs have professionally prepared programmes using digital solutions and virtual mobility is generally distrusted. E-learning is used by a handful although, as anecdotal evidence suggests, it provides a shortcut to increased, student-generated income. The Ministry allows this form of learning and leaves the questions of quality to individual HEIs.

Additionally, according to information from the author's interview at the Ministry of Science and Higher Education in preparation for this report, there are no transnational operations in Poland: although the law allows it, there has been no interest on the part of foreign universities to open branch campuses in Poland. At the same time, there are only ten Polish HEIs which have branch campuses in Great Britain, Ireland, Lithuania, Austria, Czech Republic, Ukraine and France. They cater mainly to Poles or persons of Polish origin.

10.9. Conclusions: a grass-roots success that will require (and deserves) ongoing cultivation

In Poland, internationalisation has been a bottom -up, grass-roots process. The higher education sector has managed for a number of years without a national strategy for internationalisation. A national strategy could help to promote internationalisation through a more co-ordinated effort. HEIs are not provided with sufficient guidance and support from central government for internationalisation to really take root. The fact that the strategy has not yet been created suggests that the government has not really asked itself why internationalisation might be important for the development of the sector, and such an inquiry would be a prerequisite for successful internationalisation implementation. If a meaningful national strategy is to be developed, discussion needs to focus on basic questions such as why the national higher education system should be engaged in more higher -quality international interactions of many different kinds and how, at a systemic level, international exposure and perspective could be an important part of research, science, teaching and learning. Only an internal inquiry can provide the decision-makers with the knowledge of what internationalisation could do for the quality of higher education and its outcomes, what methods to use and how to secure financing for the process. The

development of a strategy would be a signal to individual HEIs that internationalisation is desirable and beneficial at national, European and global levels. The fact that all participants in internationalisation adjust, learn and change as the process develops, with effects spreading outwards from the institutions themselves, to staff and students, the local communities and society at large, is largely neglected by the stakeholders in Poland. Nonetheless, there has been tremendous progress made in the development of internationalisation in Polish higher education: the process is now gaining momentum and should be carefully nurtured.

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11. ROMANIA

Ligia Deca and Cristina Ramona Fiţ[38]

11.1. Introduction

Since 1990, Romanian higher education stakeholders have sought to identify relevant reform avenues in response to European and international pressures. Romania has navigated its way through two and a half decades of policy changes which occurred in parallel with its accession to the European Union (EU) and NATO. During these decades of change, Romania faced both the liberalisation towards a market economy and the build-up of democratic governance arrangements. In this context, the Romanian higher education system has been simultaneously subjected to external pressures linked to post-Communist transition effects, Europeanisation and wider global trends.

Following the events of 1989, Romania was motivated by a desire to open up the country to international trends and models, with a particular focus on the European higher education landscape (Deca, 2014b). In this sense, it may be said that internationalisation, as a broad opening of the national system to international trends and partnerships, was always seen as an essential goal for reform, as well as the means by which to establish Romania on the European and global map. The communist vision of internationalisation - a strategy serving to consolidate political alliances - has now shifted towards a more market-led vision of international collaboration, mainly influenced by the desire for Romania to become a knowledge economy which is competitive in an international environment. Despite the political attractiveness of such a policy, the Romanian higher education system is only now starting to articulate a fully-fledged national internationalisation strategy. This report provides an overview of existing policies, data and research in the field of internationalisation of Romanian higher education, and discusses the obstacles faced in attempts to further the process.

11.2. The Romanian higher education system: massification, internationalisation and European integration

Following decades of elitist higher education arrangements under the communist regime, the Romanian higher education system became more accessible to the general population in the 1990s (enrolment grew from under 200 000 in 1990 to around 1 million in 2008). As a result, 108 universities are currently part of the national system: 56 public universities, accredited by the Ministry of Education and Scientific Research, 36 accredited private universities (private universities first appeared in the country in 1995), 21 private universities accredited for a limited period and 5 private universities with provisional authorisation only for study programmes at master's level and adult education.

Since 2008, the number of students has steadily decreased. In 2009/2010 there were 971 537 students enrolled in higher education in Romania. Currently, according to the National Institute for Statistics (NIS), there are 464 592 students registered in higher education programmes.

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[38] The authors wish to recognise the contributions of the experts involved in the 2012-2014 UEFISCDI projects focusing on internationalisation of higher education.

The institution primarily responsible for higher education policy is the Ministry of Education and Scientific Research. The National Education Law (Law No.1/2011) provides the legal framework for the higher education sector. Specific regulations and procedures are adopted through ministerial orders given by the Minister of National Education or by government decisions. For example, in November 2014, a new methodology for academic mobility was adopted by the Ministry of Education and Scientific Research regulating the way in which credit mobility can take place nationally or internationally.

Romanian higher education institutions are autonomous, but must comply with strict quality requirements in terms of the number of foreign students they can enrol.

The most prominent institutions involved in the internationalisation of the higher education system in Romania are:

- ARACIS, the Romanian Agency for Quality Assurance in Higher Education. The methodology for accreditation and external evaluation includes a number of quality indicators linked to internationalisation;

- ACBS, the Agency for Student Loans and Scholarships, ensures Romanian citizens are funded to study abroad for training and specialisation. In addition, it provides access to scholarships for students, graduates of accredited educational institutions, tenured teaching staff and other categories of beneficiary. Scholarships are offered by the Ministry of Education, and other authorities, foundations and donors in different states. Scholarships may be used in bilateral co-operation agreements or be offered unilaterally, they may be government-funded or derive from international programmes. The student loan component is not currently functional at the Agency level (no secondary legislation is in place);

- ANPCDEFP, the National Agency for Community Programmes in Education and Professional Training, facilitates access to continuous and active learning paths at the European level and is the institution managing the Erasmus+ Programme in Romania;

- CNRED, the National Centre for Recognition and Equivalency of Diplomas, is the main authority in the recognition and equivalence of diplomas obtained abroad.

- UEFISCDI, the Executive Agency for Higher Education, Research, Development and Innovation Funding, is an agency which has a policy advice role via a number of consultative Councils on matters which include higher education financing. The agency manages a number of structural fund projects for enhancing the capacity for evidence-basing higher education policies within the Romanian higher education system.

The internationalisation of higher education is currently high on the political agenda, being one of the strategic goals included in the 2014-2020 overall higher education strategy. This strategy is being developed as a pre-condition for accessing EU funds for the upcoming financial framework programmes. Several strategic projects, co-funded with European structural funds, were developed and are still underway in preparation for the development of the next suite of public policies in this area.

From the perspective of higher education stakeholders, the National Alliance for Student Organisations (ANOSR), the National Rectors Council (CNR) and the Alma Mater Trade Union have been active at various points in time in the internationalisation of higher education. ANOSR has published studies based on student perception. The local Erasmus Student Network branches are also active partners of the universities and foster student credit mobility for Erasmus students.

11.3. European programmes and policies: A major influence on the internationalisation of Romanian higher education

Romania has been active in the internationalisation of higher education. The presence of UNESCO-CEPES in Bucharest in 1972-2011, as well as the hosting of the Bologna Process Secretariat (2010-2012) and the 2012 European Higher Education Area Ministerial Conference and the Third Bologna Policy Forum, are indicators of its commitment in a European and global setting.

The EU TEMPUS programme was key to the reform of Romanian higher education in the 1990s (Deca, 2014a) and various joint capacity building projects co-funded by the EU, the World Bank or UNESCO have raised the capacity of Romanian higher education institutions over the past two and a half decades. In terms of current policy initiatives, the EU's Erasmus and Erasmus+ programmes have had and continue to have a significant impact on policies and strategies at national and institutional levels. Other programmes which have influenced the internationalisation of higher education in Romania include the Central European Exchange Program for University Studies (CEEPUS) and the South East Europe mobility programmes SEE, whose popularity has decreased since 2007.

According to the UEFISCDI study from 2013 entitled 'Internationalisation of Higher Education in Romania', there is no centralised and publicly available data on students studying in Romania on the basis of bilateral agreements. However, the study concludes that there is little incoming mobility, stating that 'for every 35 students, only 10 foreign students choose to study at a Romanian university (incoming mobility). As for degree mobility, there are approximately 26 000 students who choose to study in another country and 10 903 foreign students who come for an entire cycle in Romania. These numbers show that the quota of incoming students is 2.4 times lower than that of outgoing students for an entire cycle.'

The Mobility strategy 2020 for the European Higher Education Area (EHEA) was adopted at the Bucharest Ministerial Conference in 2012. One of the key objectives of the strategy is the development and implementation of a national policy on internationalisation and mobility. In Romania, an ongoing project, 'Internationalisation, equity and institutional management for a quality higher education' (IEMU), overseen by UEFISCDI and financed by the Sectorial Operational Programme Human Resources Development (SOP HRD), seeks to promote the development of a national strategy by September 2015. This project also aims to assist 20 Romanian universities to develop their own strategic plans on the internationalisation of higher education. These activities underpin Romania's commitment to the priorities set out in the 2013 European Commission communication, 'European higher education in the world'. The communication recommends that one of the priorities of the EU Member States and European HEIs should be to increase their internationalisation activities.

The EHEA Mobility Strategy 2020 and the Commission communication also recommended that EHEA countries should increase mobility through improved information about higher education study programmes. In response, the IEMU project has targeted the development of a blueprint for a structure aiming to promote information about the Romanian higher education system. Similarly, the project includes the development of a website to promote study opportunities in Romania in line with international best practice. Capacity building measures are also provided for, including guidelines for higher educational institutions on the management of internationalisation strategy and 20 training sessions for university teaching and academic staff on the internationalisation of education and its ethical

considerations. Finally, in order to monitor institutional efforts, the project will propose a set of reference indicators in the area of internationalisation of higher education institutions.

11.4. National policies for internationalisation: emphasis on mobility and engaging the Romanian diaspora

In the past, as part of a wider foreign affairs agenda of the pre-1990 communist regime, Romania implemented several strategies to attract foreign students, applying lower tuition fees than other countries, providing specific services for foreign students, such as Romanian language courses, facilitating access to libraries, and introducing special university regulations and canteen and accommodation arrangements as well as providing a small number of government-funded scholarships (Pricopie, 2004). These policies were successful and, at the beginning of 1980s, Romania was among the top 15 countries in the world providing academic services for foreign students (foreign students accounted for 10 % of total enrolments). The number of foreign students declined in the late 1980s and early 1990s, despite new bilateral agreements with Europe, Canada and the US and Romanian membership of the Socrates programme.

The Bologna Process structural reforms (three cycles, ECTS, diploma supplement, qualifications frameworks, recognition) were implemented from 2004 to 2007 (Egron-Polak et al., 2014) in order to make the Romanian system more competitive, within the framework of the EHEA and in the light of the EU accession process.

Romania has a small number of formalised national policies and strategies to encourage internationalisation. In an effort to evaluate the status quo of internationalisation of higher education in Romania, the UEFISCDI study (UEFISCDI, 2013) analysed existing internationalisation policies.

In 1991, a new government policy addressing Romanian ethnicity was introduced. The policy focused on students coming from the Republic of Moldova, and offered them special scholarships to enroll in Romanian higher education. This policy is still in place and currently two thirds of incoming degree students are ethnic Romanians from abroad. The national Law on Education (Law No 1/2011) allows the Romanian government to offer scholarships to ethnic Romanians from Moldova, Albania, Bulgaria, the former Yugoslav Republic of Macedonia, Serbia, Ukraine and Hungary, as well as to other ethnic Romanians who reside abroad. Every year, the Ministry of Education and Scientific Research determines the number of students for the next academic year, and allocates free tuition places for ethnic Romanian students, with special quotas for the countries mentioned above, plus other scholarships for ethnic Romanians who reside in countries other than those mentioned (the largest number of free tuition places, including scholarships, are awarded to students coming from the Republic of Moldova). According to data from the Ministry of Education and Scientific Research, in the academic year 2012-2013, 8 405 ethnic Romanian students from countries including Moldova, Ukraine and Bulgaria were enrolled in Romanian universities (UEFISCDI, 2013). Students receive subsidised accommodation and special scholarships from the state. While these students bring an international perspective to Romanian universities, they share the same linguistic and cultural heritage as other Romanian students, and almost all of them are Romanian-speaking.

Romania does not yet have a comprehensive strategy linking scholarships for foreign students to existing internationalisation policy or the interest of Romanian universities. The

Agency for Students Loans and Scholarships (ACBS) '…only offers a small number of scholarships for international students, mainly based on bilateral agreements' (UEFISCDI, 2013), in the context of limited public financing and in the absence of a long-term coherent strategy at national level. According to the CEEPUS website, Romania will participate in the CEEPUS III programme for 7 years, from the 2011-2012 academic year. Through this programme, the Ministry of Education and Scientific Research offers 500 months of scholarships per year. In the academic year 2012-2013, there were eight CEEPUS programmes in Romania, principally in the fields of bio-analysis, cultural anthropology, medicine, engineering and music.

One of the limitations on institutional efforts to internationalise is that while institutional autonomy is guaranteed, technically, under the Romanian Constitution, in reality this autonomy is limited in some respects, including, for example, personnel and financial policies. All academic and administrative personnel in public universities have the legal status of public sector employees and therefore, their salaries, as well as recruitment and professional advancement procedures are governed by the strict provisions of the law on public sector workers. This means that many decisions are, in fact, beyond the control of the universities. Consequently, international recruitment is very difficult, as are long stays abroad for Romanian teaching and research staff.

In 2011, the new Law on Education (No 1/2011) brought several changes with regard to the internationalisation of HE. Admission to universities is now based on the same criteria for all EU citizens. HEIs offering joint degrees with universities from abroad and with programmes in international languages are encouraged and supported financially. As an incentive to encourage staff mobility, when an application is made for a mobility programme, the applicant's position in the home institution is reserved for the duration of his or her stay abroad. The application procedure for non-EU applicants was simplified by Ministerial Ordinance No 3359MD/2013, allowing non-EU candidates to send their application directly to the accredited HEIs of their choice, instead of to the Ministry of Education and Scientific Research. A special category of visa ('Scientific visa') was introduced for foreign students wishing to undertake research in Romania for a period of longer than three months.

With regard to internationalisation at home, the actions of Romanian universities are less visible. In terms of curricular review, for example, Romanian universities integrate international dimensions in various ways: they may offer specialised programmes in international politics, international business or comparative cultural studies or study programmes in Romanian and/or in foreign languages. Increasingly, in their attempt to attract more international and local students, HEIs are also offering joint programmes. Romanian HEIs are also providing full programmes in foreign languages or undertaking more comprehensive curricular reforms in order to develop specific skills for successful integration of graduates in a globally open society, labour market and economy.

Most Romanian universities still require students to study at least one foreign language. Over the past 20 years, universities have introduced the option of studying additional languages. However, even though it is said that English has become the second teaching and learning language in Romanian universities, in many instances, the English level of the academic staff could be significantly improved.

To conclude, most Romanian internationalisation policies and strategies are focused on mobility and cultural cooperation with the Romanian diaspora. However, there is insufficient coordination between the national institutions involved in the process of internationalisation

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and there is no centralised HE database to substantiate strategic or operational policy decisions.

11.5. Institutional policies on internationalisation: European inspiration, local limitations

Institutional policies on internationalisation in Romania vary greatly depending on the size and mission of the universities involved. National legislation tends to limit internationalisation efforts, while European programmes and funding shape much of the internationalisation activity at university level. In addition, research-intensive universities are increasingly focused on their reputational profile, setting specific objectives in relation to their relative position in international league tables and rankings.

The UEFISCDI report 'Internationalisation of Higher Education in Romania' (UEFISCDI, 2013) was based on a small sample of five universities, and hence few general conclusions can be drawn from this study. The report does suggest, though, that when talking about institutional efforts to enhance internationalisation, there are considerable differences in terms of foreign student enrolment (2012-2013 academic year) across the different institutions, with figures ranging between 0.5 % and 4 % of the total student population. In most cases, students were enrolled via interinstitutional agreements and European mobility schemes. The vast majority of foreign students were enrolled at bachelor level and came from European countries. The study also revealed several issues related to national policies that were having an impact on institutional internationalisation efforts. For example, national education policies undergo frequent revision and there is a lack of national strategy on internationalisation and an unfavourable general legislative framework (bureaucratic visa procedures and work permit difficulties, recognition issues and restrictive employment regulations).The institutions also pointed to another critical obstacle to enhanced mobility and internationalisation at institutional level, namely the small number of foreign language programmes and the lack of language skills among academic and administrative staff. Other challenges include insufficient human resources to address the administrative issues involved in internationalisation activities, as well as low financial support for internationalisation activities.

Regarding internationalisation at home, universities included in the report indicated that 30 % or less of their courses/programmes had an international orientation. Furthermore, a 2010 ANOSR study noted that, from the students' perspective, the major issues that influence internationalisation efforts in general and mobility numbers in particular are the small number of active bilateral or multilateral agreements between universities, the lack of coherent legislation on student mobility, lack of communication or advertising of mobility opportunities among students and inadequate financial support for mobility. Students also underlined problems regarding credit mobility, and in particular, full recognition of study periods abroad, as a reason for their reluctance to go abroad.

In attracting international student recruitment, Romanian universities currently focus on Asia (which has become an important source of international students), Europe (in particular, Italy) and Moldova. The reasons most foreign students decide to study in Romania relate to low tuition fees, the relatively low cost of living compared with other European countries and easier access to programmes which are comparable to those offered in other countries – for example, medicine, pharmacy, engineering, and architecture. Degree-seeking foreign students from EU countries and from the Romanian diaspora pay the same tuition fees as Romanian students and are entitled to state-subsidised study places, while third-country students can be charged differentiated tuition

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fees. The level of tuition fees is established by each Romanian university, according to level of study and discipline.

Romanian institutions are keen to promote international partnerships focused on mobility and research, whilst recognising that many partnerships are not active at all times.

11.6. Key performance indicators: internationalisation of education

Analysis of key performance indicators is almost impossible as there are no centralised records of mobility numbers, overall partnership agreements or other key figures. The NIS does not currently collect national data on mobility. Consequently, a major effort is required to identify and make critical use of existing sources at national and international level. For example, there are several partial mobility records, but based on different definitions of mobility or mobility programmes. Hence the discussion below is tentative, rather than definitive.

According to the 2013 UEFISCDI study on internationalisation, the number of students enrolled in short-term outgoing mobility programmes increased by approximately one third from 2006 to 2010. According to the ANPCDEFP report from 2011, 17 245 individual students were mobile in 2011, which means that approximately 1 % of all Romanian students were involved in outward mobility. The same report concludes that 4 604 students benefited from Erasmus grants in 2011, 3 503 of which were Erasmus study grants and 1 101 Erasmus placement grants. According to the ANPCDEFP report from 2013, 5 011 students received Erasmus mobility grants (3 212 study grants and 1 799 for placement) and 8.8 % more students were mobile than in the academic year 2010-2011. Top destination countries for mobility students were France, Spain, Italy, Germany and Portugal. Perhaps the fact that Romanian is a Latin language makes the students' choice easier, in view of their language skills and culture or lifestyle similarities.

Further information about credit mobility programmes and data for teaching and student mobility can be accessed from the 'Internationalisation of Higher Education in Romania' study.

According to the data provided by the Ministry of Education and Scientific Research, the numbers of foreign students and ethnic Romanians participating in incoming degree mobility programmes for students were as follows:

Table 5: Numbers of foreign students and ethnic Romanians participating in incoming degree mobility programmes for students

2012–2013	Bachelor	Master	PhD	Specialised courses and resident students
Foreign students	10 168	434	301	488
Ethnic Romanians	7 277	1 029	99	257
TOTAL	17 445	1 463	400	745

The top countries of origin for foreign students in the academic year 2012–2013 included the Republic of Moldova, Israel, Tunisia, France, Greece, Germany, Serbia, Turkey and Morocco.

In 2013-2014, the number of incoming foreign students studying in Romanian universities was approximately 12 000, according to data provided by the Ministry of Education and Scientific Research. Of those, 7 363 were enrolled in universities of medicine and pharmacy in Bucharest, Timisoara, Iasi and Cluj-Napoca ('UMF has the highest number of foreign students in the country' (Hot News 2014)).

Data from the university classification system on incoming and outgoing mobility programmes for teaching staff reveal that the number of foreign lecturers coming to Romania increased 33 % between 2006 and 2010. This figure applies only to lecturers teaching at undergraduate level. According to the ANPCDEFP report of 2011, the estimated participation rate of teachers in outbound Erasmus mobility programmes is 12.21 %. In the academic years 2011-2012 and 2012-2013 the numbers of academic staff benefitting from Erasmus grants increased by 13 % and 38.9 %, respectively, compared to the academic year 2010-2011. Top destination countries were France, Italy, Hungary, Germany, Spain and Greece. As for incoming foreign academic staff, only 100 applicants were attracted to Romanian universities in 2010.

Data sources are scarce in respect of joint study programmes. Notwithstanding this, figures from the university classification process confirm that in 2009-2010 Romania had 320 joint study programmes, a threefold increase compared to the academic year 2005–2006. According to the Ministry of Education and Scientific Research, Romania has approximately 200 bilateral collaboration agreements with almost 100 countries. Unfortunately, there is no centralised data regarding the fields of study of the joint programmes and no information regarding the countries with which these programmes are being developed.

In terms of cross-border higher education, few universities have branches in other countries. The exceptions are Constanta Maritime University with a branch in Aktau, Kazakhstan, devoted to Maritime Navigation and Transport, the Dunarea de Jos University for Marine Engineering and the University of Galati Cross-Border Faculty of Humanities, Economics and Engineering in Cahul in the Republic of Moldova. According to the 2013 UEFISCDI report, Romania has cross-border projects and partnerships, mainly with Hungary, Serbia, Bulgaria, Republic of Moldova and Ukraine. The EHEA Leuven Ministerial Communique 2009 recommends that transnational education should be governed by the European Standards and Guidelines for Quality Assurance in Higher Education (ESG). In order to implement this recommendation, the Quality Assurance Agency for Higher

Education (ARACIS) has extended its methodological guidelines and procedures and is actively applying them in the external evaluation of the cross-border provision of higher education. Thus, the two specific programmes mentioned above were also reviewed according to the ARACIS criteria.

11.7. Key performance indicators: internationalisation of research

According to the EU scale of measurements, the research and development performance of Romania is well below the EU average; Romania is in the 'modest innovators' category. The scientific visa was introduced as a tool to enhance transnational mobility. In terms of research mobility, support was provided for doctoral and post-doctoral schools through the Sectorial Operational Programme 'Development of Human Resources', which, by 2013, had funded 32 000 000 PhDs and 2 000 Post-doctorates. 'In 2008 – 2010 POSDRU programs were those that encouraged research projects and were the policy tool by which PhD students could get scholarships. Therefore, in 2008-2010, approximately 12 500 (Ministry of Labour, Family and Social Protection, 2010) PhD students were involved and benefited from the financed POSDRU programs. The share of PhD students supported in POSDRU programs that obtained a Ph.D. was 90 %. In 2011-2013 there was an increase of 160 % of the PhD students involved in POSDRU in comparison with 2008-2010. As well, all the PhD students with scholarships through POSDRU were required to take a mobility stage between two weeks and not exceeding 8 consecutive months.' (UEFISCDI, 2013).

Compared to figures from 2005, ISI-indexed publications increased by 64 % following Romania's accession to the EU in 2007. A similar increase (70.22 %) occurred in 2010 when the 2007-2013 Sectorial Operational Programme Development of Human Resource (POSDRU) programmes for researchers became popular. In 2012, 36 % of ISI articles were written in collaboration with international researchers. The number of ISI articles published in collaboration with international researchers decreased 12 % between 2005 and 2012. Over the past four years, Romanian researchers have collaborated most frequently with international counterparts in France, Germany, the US and Italy.

China, France, Moldova, Greece, Hungary and Austria are the most popular partner countries for bilateral research projects, according to UEFISCDI data, with 326 bilateral research projects in progress in 2013, worth approximately EUR 23 million.

On capacity building and Romania's involvement in international bodies dealing with internationalisation we can state the following: Romania has fourteen member universities (eleven public and three private) in the International Association of Universities (IAU). Thirty Romanian universities are members of the European University Association (EUA) and one Romanian university is a member of the Coimbra Group, as well as of the UNICA network.

11.8. Key challenges, potential opportunities and how the European Union could play a positive role

Internationalisation of higher education is seen as a key element for Romanian higher education reform. Romania underwent a transition from communism to democracy in which re-integration in Europe was fundamental, as was the need to forge new alliances and partnerships. As such, internationalisation of higher education was always a constant in terms of governmental priorities. Even though internationalisation of higher education has featured high on the Romanian agenda for two and a half decades, Romania's

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internationalisation efforts are still dispersed, managed in an ad-hoc fashion and mainly focused on credit mobility, attracting degree-seeking foreign students (and the additional revenue they generate), supporting the Romanian-speaking diaspora and on research partnerships, but clear attempts are being made to increase and streamline strategic efforts at both national and institutional level. The IEMU project is a clear example of this, as is the upcoming strategy for higher education, developed within the framework of Romania's commitment to the new EU 2014-2020 financial framework, with assistance from the World Bank, which includes an internationalisation section.

De Wit and Engel (2014) note that 'European Union policies and programmes are driving the agenda, but also note a lack of comprehensive strategies for internationalisation at the national and institutional level.' The exclusive focus on internationalisation abroad is also evident, and is compounded by a lack of strategy to further engage in internationalisation at home.

The lack of national resources to reward performance or provide incentives in the area of internationalisation at institutional level could be compensated for by EU structural funds, as well as by dedicated Erasmus+ funding. Similarly, European efforts to promote the EU and EHEA to other continents should be geared towards supporting countries which are not yet leaders in the global environment. A possible future subject of debate for the EU might be the large number of departing graduates in strategic areas, such as medicine. The brain drain recorded in these fields makes internationalisation an uneven and sometimes detrimental process, in the view of members of academic staff and politicians alike.

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12.   SPAIN

Laura Rumbley and Laura Howard[39]

12.1. Introduction

This report provides a short overview of key aspects of the Spanish higher education system and its international dimensions. The focus is on universities, given that they dominate the higher education sector in terms of concentration of students, public funding levels, and their general visibility in society. Quantitative indicators for the system as a whole are provided, with special attention paid to the particular aspects of the system that have a bearing on internationalisation. The report also sheds light on the evolving policies and programmes that trace the Spanish approach to internationalisation in recent years. Various strengths and weaknesses of these approaches are noted, as are a range of key opportunities and challenges facing the sector now and for future development.

12.2. An evolving higher education system

Responsibility for higher education in Spain rests at the level of the Autonomous Communities, not at the national level. This highly decentralised arrangement means that there are essentially a series of 'subsystems' governing higher education that can be quite distinct from one another in matters such as financing, personnel policies (including talent recruitment, labour contracts), etc.

According to the Spanish Ministry of Education, Culture and Sport (MECD, 2013), there are 82 universities in Spain – 50 are public institutions, while the remaining 32 are private. Universities offer programmes across 17 Autonomous Communities (and two autonomous cities, Ceuta and Melilla, in North Africa), via 236 physical branch campuses, and 112 special and online mechanisms. Since 2001, 14 new private universities have been established. Four of these are private, distance learning providers, which brings the number of distance learning universities in Spain to 6. These distance learning institutions are based in Spain but also have headquarters, offices, and/or testing centres or services physically located outside the country (commonly in Latin America). The system also includes 481 research institutes, 29 doctoral schools (with many others in the process of being set up), and 47 university hospitals (MECD, 2013).

Enrolment in the 2012-2013 academic year (including both bachelor's and master's level students) stood at 1 561 123; of these, 111 087 were enrolled in official master's programmes. Public universities enrol the majority of students, including some 88.5 % of bachelor's students and approximately 75 % of master's level students. Enrolment in bachelor's programmes had been decreasing slightly annually in the early 2000s, in line with demographic trends and a shrinking 18-21 age cohort in Spain. However, the economic crisis affecting the country since 2007-2008 is considered responsible for an upswing in undergraduate enrolments through 2011-2012, although enrolment is again showing signs of slowing. Enrolment in master's programmes grew dramatically in the period 2006-2007 (when the master's was first offered in Spain) through 2010-2011. Since that time, enrolment seems to have stabilised in the range of 105 000 to 110 000. On average, Spanish students take 4.66 years to complete their higher education studies, as

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opposed to the OECD average of 3.9 years and the EU-27 average of 4.11 years (MECD, 2013).

In 2012, the total number of completed doctoral dissertations was 10 531, which represents an 11.1 % increase over the previous year. An increasing completion rate for doctoral level studies has been evident for several years – since 2008 the number of completed dissertations has grown by some 35 %. This is at least partly attributed to the introduction of changes in the regulations governing doctoral studies, encouraging many scholars to complete their dissertations before the implementation of the changes. Some 67 % of academic staff in Spanish universities (public and private) have completed doctoral studies. However, the incidence of doctoral degree holders among academic staff in public universities is significantly greater (70.4 %) than in private universities (43.4 %) (MECD, 2013).

As of 2012-2013, Spanish universities employed just over 115 000 academic staff in teaching and research roles. Nearly 88 % of these individuals work in the public sector (MECD, 2013). The number of academic and administrative staff working in the private universities of Spain has grown in recent years, mostly as a result of the expanding number of private institutions in the country, in tandem with public sector reductions in staff. The number of public university academic staff with teaching and research responsibilities dropped 4.6 % – from 100 600 to 95 947 – between 2009-2010 and 2012-2013. Similarly, public universities saw a 3.7 % drop in administrative staff numbers during the period 2010-2011 to 2012-2013 (MECD, 2013). This is due to staffing restrictions imposed by the central government as a result of the severe economic crisis and its ongoing effects since 2008.

In 2012, Spain spent just under EUR 13.4 billion on research and development (R&D), including contributions made by the public purse, private enterprise and universities themselves. This figure represents 5.6 % less than the previous year's spending, and is characteristic of a gradual annual decline in evidence since 2008 (MECD, 2013). Analysis of 2012 data also point to falling private investment in university R&D – with a drop of 14.8 % of such investment between 2011 and 2012 (Fundación CYD, 2013). Decline is also evident in the number of personnel working in R&D, down 4.5 % in 2012 from the previous year (MECD, 2013). Analysis by the Confederación de Sociedades Científicas de España – COSCE (2014) indicates that the 2014 budget for research, development, and innovation (referred to in Spanish with the shorthand 'I+D+i') grew by 3.6 % over the previous year (or 2 %, if adjusted for expected inflation). However, the COSCE report notes that this positive growth in I+D+i investment is 'very insufficient' in light of the 'deterioration accumulated in the preceding years' (p. 38) of the economic crisis, and that 'a true change in direction would require that in successive years a much greater effort be made . . .. to improve the critical situation in which our system of science and innovation finds itself' (p. 38).

Finally, it is worth noting the financial constraints in overall budgets experienced by universities in recent years. Figures indicate a fall of over 12 % in the state funding of public universities between 2009 and 2013, which, when linked to the increase in the consumer price index over the same period, represents a loss of income of almost 22 %, at a time when student enrolment increased by 9 % (Comisiones Obreras [CCOO], 2014, p.11). The introduction to the latest edition of the Spanish Rectors' Conference (CRUE) biannual report ('The Spanish University in Figures 2012') states, 'The new needs deriving from the implantation of the EHEA [European Higher Education Area], maintaining innovative and competitive research projects, mobility of students and staff, everything that the university offers to society and its advancement, is compromised by a policy of austerity whose most serious effects will be felt in the medium to long term' (CRUE, 2013, p.7).

12.3. The strong influence of European programmes and policies on the internationalisation of higher education

The European context is (since Spain's entry into the European Union in 1986) a major factor in the development of national policies and strategies for internationalisation in Spain. A primary example of this can be seen in the new national strategy for the internationalisation of higher education (discussed in greater detail below), where many references are made to the Europe 2020 strategy, the European Higher Education Area and to specific programmes such as Erasmus+ and Horizon 2020. Spanish participation in European programmes (particularly Erasmus, as described later in this report) has been robust from the start, and is seen as a fundamental building block for increased internationalisation. Indeed, the new Spanish national strategy reflects a reliance on funding through European Commission (EC) projects and programmes (among other sources) for ongoing internationalisation developments.

12.4. Challenges and aspirations of national policies for internationalisation of higher education

Spain has been committed to internationalising higher education in a variety of ways for more than two decades. One relevant example is the programming coordinated by the Ministry of Foreign Affairs in the 1990s and early 2000s, which encouraged Spanish universities to be active in development cooperation, particularly in Latin America and North Africa. This was articulated through the very successful PCI (Programme for Inter-university Cooperation and Scientific Research) that formed the basis for much of the international engagement beyond Europe (Rumbley and Howard, 2013).

Perhaps the most notable initiatives to raise the country's higher education profile and map an agenda for enhanced quality and relevance through international engagement were the establishment in 2008 of 'Universidad.es,' a public foundation designed to promote Spain globally as a destination for international students and scholars and, in early 2009, the release of the government's Estrategia Universidad 2015 (EU2015), a blueprint for how to 'substantially improve' the university system and 'place it at a level of international excellence.' EU2015 advocated pursuing excellence in key scientific and technological fields, in order to increase Spain's visibility on the European landscape, and situated internationalisation at the heart of university policy in Spain. The focus on research and innovation was emphasised in the EU2015's 'Campus de Excelencia Internacional' initiative, designed to encourage (and incentivise) universities across Spain to specialise in key areas – from nano-technology to fine arts – facilitating more strategic investment in the most promising campuses to attract international recognition of accomplishment in specific fields (MECD, 2010; Rumbley and Howard, 2013).

Unfortunately, none of these initiatives has achieved the desired outcomes, as 'Spain can no longer sustain the ambitious international agenda for its universities given the country's precarious political and economic circumstances' (Rumbley and Howard, 2013, p. 13). The PCI saw its final call for proposals in 2011, when severe cutbacks in the Ministry's budget made the programme unviable.

In June 2013, the government announced that Universidad.es would be merged with the OAPEE, the Spanish national agency for European programmes, as part of a strategy to reduce public spending. After a year and a half of legal and operational uncertainty, it seems that Universidad.es will become part of a restructured national body, SEPIE (Spanish Service for the Internationalisation of Education), in January 2015 (with the OAPEE

acronym no longer in use). Many are sceptical about the ability of Universidad.es to function as a clear, nimble, and effective voice for Spanish higher education around the world in this new framework, especially without adequate funding.

In a report published in 2011, an international team of experts (representing, among other entities, the World Bank and the International Association of Universities), determined that the country's progress towards the goals of EU2015 was uneven at best, and made 25 specific recommendations to improve performance and overcome implementation obstacles (Tarrach, Egron-Polak, de Maret, Rapp and Salmi, 2011). National funding for the 'Campus de Excelencia Internacional' programme terminated, however, leaving many campus initiatives unrealised and others dependent on limited regional funding.

At present, the Spanish government is finalising the first national Strategy for the Internationalisation of Spanish Universities 2015 – 2020 (MECD, in press). The aim of the strategy is 'to consolidate a strong and internationally attractive university system which promotes incoming and outgoing mobility of the best students, academic and non-academic staff; the quality of education; the potential of the Spanish language in higher education; the internationalisation of the curricula and of research activities, contributing to improve the international attractiveness and competitiveness of Spain, as well as socioeconomic development based on knowledge.'

The strategy proposes 24 objectives aligned under four main strategic goals: 1) consolidate a highly internationalised university system, 2) increase the international attractiveness of universities, 3) promote the international competitiveness of the region surrounding each university, and 4) intensify cooperation in higher education with other world regions. There is little to no reference made to digital learning/virtual mobility, but rather improving services offered to international students and scholars, the need to develop internationalisation at home and increase the number of joint and double degrees, along with degrees taught in English. Mobility of staff and students plays an important role, with the emphasis shifting towards the search for global talent. Mobility is, however, still measured quantitatively rather than by achievement of learning outcomes.

Of concern to many stakeholders is the fact that there is no accompanying financial support. Under the new strategy, reduced budgets are presented as less of an obstacle and more as a source of new opportunities, guided by the notion that the proposed objectives will be achievable with funding available from relevant regional, national and European Commission programmes, and through increased income derived from the growing number of international students, international projects, etc., as a result of the new strategy.

The role played by the universities themselves on a national level is worth noting. The CICUE (The Spanish Universities' Commission for Internationalisation and Cooperation, the sectorial committee for internationalisation of the Spanish Rector's Conference, CRUE) provides an important forum for individuals responsible for internationalisation and development cooperation to meet and work together to lead and coordinate joint initiatives and share best practices.

With regard to services developed to support incoming international students and scholars, progress has been uneven across the country and no national guidelines have been developed. In some cases, institutions with rising levels of incoming mobility (or those aiming to increase them) have invested in support services tailored to the needs of their international students and staff. In other cases, little has been done to ensure these needs are covered beyond providing English translations of some institutional information.

12.5. A range of key stakeholders and funding schemes for internationalisation

The Spanish higher education system is characterised by a 'high degree of decentralisation' (Eurypedia, 2014, n.p.). In light of the executive and administrative, management and financial responsibilities of the Autonomous Communities (MECD, 2013), it is important to note that these regional governments play a key role in the internationalisation of their respective higher education sectors. There are significant differences across the Autonomous Communities, with the largest and most populous – Catalonia, Andalusia and Madrid – often the most active. Typical activities at this level have included the financing of group presence at key international education fora (such as the annual conferences of the European Association for International Education and NAFSA: Association of International Educators in the United States); online portals to promote Communities' specific university systems (such as StudyinCatalonia.com); and some financial support for mobility, mostly for outbound students. One example of such support can be seen in 'Talentia,' a fellowship programme coordinated under the auspices of the Agencia Andaluza del Conocimiento (Andalusian Knowledge Agency). Talentia provides scholarships for overseas study at the postgraduate level for talented individuals from Andalusia, as well as assistance with post-study integration and encouragement of entrepreneurship among award recipients. Since 1997, the Government of Andalusia has committed over EUR 22 million to 491 fellowships (Junta de Andalucía, n.d.).

One of the most important sources of private support for Spanish higher education and its international dimensions is the banking giant, Banco Santander. Through its one-of-a kind Santander Universities Division, the bank has developed a multi-pronged agenda in support of higher education initiatives over the last 17 years with an accompanying investment during this period of some EUR 1 billion. In 2013 alone, the bank earmarked EUR 143 million for this work. The Banco Santander initiatives most closely related to key aspects of internationalisation for Spain include scholarships for international mobility and support for Spanish language learning around the world. The bank also promotes a series of global projects, including Universia, the largest network of Spanish and Portuguese-speaking universities in the world with 1 290 universities in 23 countries; the Miguel Cervantes Virtual Library, the largest online collection of Hispanic literature; RedEmprendia, a network of 24 Ibero-American universities oriented toward entrepreneurship, innovation, and the application of research and development activities; and active engagement in the effort to establish an Ibero-American Higher Education Area. Benefits of these activities clearly extend beyond the Spanish context, with direct impact on partner countries, particularly in Latin America.

Smaller initiatives include the Fundación Carolina (FC) which has played a notable role in supporting mobility by providing scholarship opportunities to international students, particularly from Latin America. From its initial establishment in 2000, the FC now boasts a 'Carolina Network' of some 14 000 individuals who have in some way been connected with the foundation as scholarship recipients, leaders, researchers, or professionals. Furthermore, the Foundation coordinates 10 'Carolina Associations' across Latin America (Fundación Carolina, n.d.). The FC receives a mix of public and private support and recent cuts to public budgets have had a negative impact on the FC's programmes.

PIMA (the Programme for Exchange and Academic Mobility) offers an example of internationalisation activity that draws together a varied set of stakeholders – this time, the Organisation of Ibero-American States (OEI) and (since 2005) the Junta de Andalucía (i.e., the government of the Autonomous Community of Andalusia), as well as the universities of Andalusia. PIMA facilitates mobility for bachelor's-level students, relying on thematic networks involving higher education institutions from at least 3 participating countries (OEI, 2014). Multilateral engagement is of particular interest here, albeit on a very small scale.

12.6. Variations in effectiveness of institutional policies

At the institutional level, the adoption of effective internationalisation strategies has been extremely uneven across the country. Participation in the 'Campus de Excelencia Internacional' (CEI) initiative required institutions to develop an internationalisation strategy, but in many cases this was done merely for the purposes of CEI proposals and not put into practice in a meaningful way. One of the 24 objectives of the (as yet not formally published) new national strategy is to 'update institutional internationalisation strategies.' In general terms, mobility remains the focus of the internationalisation policy of most institutions. While efforts are being made to extend the mobility opportunities for academic and non-academic staff, the current situation resulting from the cutbacks in university financing means that the extra work load required of staff makes it increasingly difficult to take advantage of such opportunities. Reduced budgets for international activities are a reflection of cutbacks across university budgets and pose a barrier to the initiation and indeed continuation of many internationalisation activities. In addition, the institutional culture within Spanish universities, as in other southern European countries where the cyclical change of rector means a change of key figures in decision-making roles, also represents a barrier to the implementation of coherent, long-term strategy.

12.7. Upward trend of key performance indicators of internationalisation

In 2012-2013, Spanish universities played host to a total of 74 297 foreign students, comprising 4.8 % of the population of the combined bachelor's and master's student population in the country. The international student presence is much more visible at master's level, however, where the international population accounts for 18.4 % of total master's student enrolment in Spain (MECD, 2013).

Among all foreign university students in Spain, 35.7 % (or 26 515 in total) come from other European Union countries (MECD, 2013). At bachelor's level, 41.4 % of enrolled international students in 2012-2013 came from other EU countries; another 29.5 % came from Latin America and the Caribbean. The next largest group of students at this level are from North Africa, although they comprised just 8.7 % of bachelor's students in 2012-2013. At the master's level, 53.7 % of international students in 2012-2013 came from Latin America and the Caribbean. The next largest proportion of international master's students (20.8 %) comprised those from other EU-27 countries. Another 13.5 % of all master's-level foreign students hailed from Asia and Oceania (MECD, 2013).

Over the period 2008-2009 – 2012-2013, the MECD (2013) notes that the international student population in Spain increased by 45 % at bachelor's level and by nearly 79 % at master's level.

In 2012, the percentage of non-Spaniards completing doctoral programmes in Spain reached 25 %, and the MECD notes that this number 'continues growing' (MECD, 2013, p. 30). In 2012, 60.6 % of international doctoral students completing dissertations or theses came from Latin America and the Caribbean, while another 25.9 % came from other EU-27 countries.

Although the MECD data are not completely clear about the distinction between degree mobility (where students are internationally mobile for the purpose of pursuing a full degree) and credit mobility (where mobility is undertaken in order to accumulate credits applied but not necessarily to obtain a full degree abroad), credit mobility is a very important aspect of the Spanish experience with internationalisation. Most importantly,

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since its inception in 1987, the EU's Erasmus programme has been a centre-piece of mobility activity – and by extension, internationalisation – for Spanish higher education (Rumbley, 2010). In 2012-2013, Spain sent more students out of the country on Erasmus exchanges and placements (39 249 in total) than any other country (European Commission, 2014b), and also received the largest number of incoming Erasmus exchange students in all of Europe in 2012-2013 – 40 202 in total (European Commission, 2014a). The Spanish outbound Erasmus numbers were down 1 % from the previous year, after having witnessed annual growth in all years (apart from 2006-2007) from 2000-2001 through 2011-2012 (European Commission, 2014c). Drastic cuts in Ministry funding supporting Erasmus mobility (Aunión, 2012) have likely contributed to this development.

Meanwhile, in terms of mobility beyond the scope of the Erasmus framework, there are large numbers of US students traveling to Spain each year for credit mobility experiences. In 2011-2012, some 26 500 US students studied in Spain (Institute of International Education, 2013). According to the Association of American Programs in Spain (APUNE), many of these students participate in programmes delivered partially or exclusively by their home institution (APUNE, 2010). This raises questions about the extent and nature of the effects of the US 'study abroad' phenomenon on internationalisation in Spanish higher education – particularly in terms of engagement between US and Spanish students, faculty and staff. Still, due to the significant size of this population – which, according to a recent estimate, contributed nearly EUR 200 million to the Spanish economy over the course of the 2013-2014 academic year (Grasset, Griffin, and Pérez-Bedmar, 2014) – US study abroad students are an important presence.

The professoriate in Spain is largely (97.5 %) Spanish, likely unsurprising in a national context of internally-focused hiring practices (Mora, in press). There are slight differences across the public versus the private higher education sectors: 98 % of professors in public universities, and 95.3 % of professors in private universities, are Spanish. In most fields, about half of the foreign professors in Spain come from other countries within the European Union. In the arts and humanities, however, the EU presence is much stronger – 79 % of foreign faculty in these fields hail from within the EU (MECD, 2013). Among the foreign faculty who do not come from other European Union countries, a significant number are from Latin America and the Caribbean.

The incidence of outbound Erasmus staff mobility has evolved consistently upward over the last decade – from 1 348 in 2000-2011 to 4 654 in 2011-2012. These numbers situate Spain as a leading sending country. At the same time, the average duration in days of these mobility sojourns has trended down slightly since 2007-2008, when the average duration of the Erasmus staff mobility experience was 6.2 days; in 2011-2012, it was 5.4 days.

In terms of interinstitutional cooperation, it can be difficult to track these kinds of initiatives in a comprehensive way, given that such cooperative arrangements are normally administered at the institutional level. However, the figures available on Spanish involvement in various aspects of the Erasmus Mundus family of initiatives are somewhat illustrative. Specifically, in the period 2008 – 2012, 47 Spanish universities participated in 92 distinct Action 1 Erasmus Mundus Joint Degree or Master's Courses. Of these 92 projects, the Spanish university partners served as coordinators in 24 instances. The involvement of Spanish universities in Action 2 mobility consortia has been more extensive. The geographic focus of these activities has been widespread, although significantly focused on Latin America, North Africa and the Middle East, as well as Central Asia. This

has served to diversify the source of international students in Spain in recent years, which has been traditionally dominated by large numbers from Latin America.

Spain offers an impressive range of international joint degrees as well as double degrees, particularly in some technology-focused fields. This kind of academic cooperation requires, and has resulted in, very close cooperation between the Spanish and foreign universities involved. In addition to facilitating closer cooperation for teaching and the mobility of faculty, these programmes have attracted foreign students who are drawn by the appeal of the broader academic and professional recognition that results from international joint and double degrees.

International branch campuses (IBCs) are not a major feature of the internationalisation landscape in Spain. According to the Cross-Border Education Research Team (C-BERT), as of September 2014, there are four IBCs situated in Spain. Three of these are branches of US institutions, and one is affiliated with a French institution. Only one Spanish institution has established an international branch campus – IESE Business School (University of Navarra), with a centre in the United States (C-BERT, 2014). However, on the inbound side of the cross-border equation, it is interesting to note that APUNE (n.d.), claims over 60 members in 2013-2014, many with multiple programme sites in Spain.

In terms of cooperation for development, Spanish universities have been encouraged for many years to engage internationally, particularly in Latin America and North Africa, through programming and funding mechanisms overseen by the Ministry of Foreign Affairs and Cooperation's Agencia Española de Cooperación Internacional para el Desarrollo (AECID). Between 2007 and 2011, the budgets made public through the AECID's official calls for proposals grew from EUR 15.4 million and EUR 24.5 million, demonstrating an ongoing commitment to work in this area. The AECID indicates that it continues to manage scholarships for foreign students in Spanish higher education institutions, and promotes international internship experiences for Spaniards and knowledge exchange between Spanish universities and universities of partner countries (AECID, n.d.). However, as a result of the budgetary crisis, the AECID appears to be essentially paralysed with practically no funding to underwrite its role as the national promoter of development cooperation.

12.8. Sincere aspirations with room for considerable improvement

A 2011 commentary entitled 'The internationalisation of the Spanish university and its contribution to the international projection of the country' (Crespo MacLennan, 2011) highlights a crucial disconnect between the size of the Spanish economy and the nation's distinguished cultural and political history, on the one hand, and the underwhelming position of Spanish universities on the global higher education landscape, on the other hand. While the Spanish university system clearly presents a number of strengths, this short report shares many of the same critical perspectives touched upon in Crespo MacLennan's 2011 analysis, and elsewhere.

Spanish higher education – at national and regional levels, and in the context of individual institutional activities – has clearly undertaken a range of tangible efforts to expand its international agenda and profile. This work has been guided by a strong affiliation with European Union efforts to stimulate mobility and interinstitutional cooperation; a fundamental commitment to cooperation for development through the strengthening of connections with regions of the world of historical relevance to Spain (particularly Latin America); and an overarching sense that engagement with the global knowledge society is

crucial if Spain is to play an active role in world events in the 21st century, effectively serve its citizens and secure the nation's future.

The country is challenged, however, to achieve its full potential with regard to internationalisation in light of several key limitations. These include:

- Unstable and insufficient funding. This is an understandable yet crippling consequence of the economic crisis of recent years that will likely have long-term consequences for Spain's internationalisation agenda and outcomes.

- Short-term leadership (and priorities) within institutions. In a context where most universities elect rectors and leadership teams for limited terms, institutions face real difficulties with continuity of vision for internationalisation and sustaining strategic actions over extended periods of time.

- Strong inward orientations. Spanish universities, for a variety of organisational and cultural reasons, have a very strong tendency to hire from within (Crespo MacLennan, 2011; Mora, in press). Furthermore, there are relatively few programmes offered in English, along with a low level of English language proficiency in the general population and among Spain's older academics. Although one could argue that Spain might better leverage Spanish, a global language in its own right, the country remains disadvantaged when it comes to receiving and cultivating the non-local academic talent so crucial to many aspects of the internationalisation enterprise.

- Uncertain outcomes of further university reform. Spain's minister of education has recently unveiled a proposal that includes allowing Spanish universities to offer three-year bachelor's degrees. Currently, Spanish universities offer four-year bachelor's degrees and (mostly) one-year master's degrees. This '4+1' configuration differs from the '3+2' arrangement in place in much of Europe. The minister's proposal is presented as an enhancement to internationalisation efforts (i.e., allowing for easier partnership and mobility arrangements with other European university systems). However, the change is considered problematic and many worry that having both 3+2 and 4+1 offerings will increase domestic and international confusion over the Spanish university system (Sanmartín, 2014).

- An ongoing focus on the quantitative aspects of mobility. Appreciation for the notion that mobility is a means to an end, with the potential to provide immensely enriching and transformational benefits to individuals and institutions, is growing in the Spanish context. However, limitations of time and resources make it exceedingly difficult to transform this expanding awareness into tangible benefits.

Although these limitations present daunting challenges, there is also room for optimism. Spain is clearly attractive to international students, and many Spanish students show keen interest in international mobility. A critical mass of these students, if effectively and intelligently leveraged, can serve as a basis for deeper and wider efforts to expand the benefits of mobility to teaching and learning, and secure positive impacts for the broader student population. Spanish university connections with Latin America have made a great deal of sense and, if quality and relevance are assured, have the potential to evolve significantly over time for mutual benefit – particularly if the elaboration of the Ibero-American Higher Education Space can be achieved.

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Moving forward, leadership – at national and institutional levels – appears to be the most crucial element to ensure the implementation of an effective and sustainable internationalisation agenda. Supported by competent and committed faculty and international education professionals, Spanish higher education leaders must be appropriately informed of the stakes and complexities involved, and genuinely engaged with the internationalisation enterprise for the full range of potential benefits to be achieved.

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13. UNITED KINGDOM

Steve Woodfield and Elspeth Jones[40]

13.1. Introduction

The UK has a single higher education (HE) system but devolved HE policy in its four countries (England, Scotland, Wales, Northern Ireland) although key issues such as quality assurance and immigration are nationally coordinated. To date, national quality assurance policy has supported the UK's strong international reputation for the quality of its HE system, whilst recent policy on immigration has provided challenges for international student recruitment and damaged the UK HE sector's reputation overseas. With over 30 years of charging full-cost fees for non-EU students, the importance of providing international students with a high-quality experience is well understood and, as home students in England, Wales and Northern Ireland now pay higher fees, the focus on students' nationality is becoming less relevant.

National policies related to international HE are slowly diverging although internationalisation is sector led rather than directed by government policy and, as governmental funding schemes reduce in number, international activities are largely financed from income generated by institutions themselves. The UK HE sector is highly diverse and is characterised by a range of missions and strategies for internationalisation in a highly competitive environment. Although the income from international student fees is important for institutional finances, the presence of international students sustains many nationally-important subject areas. It also brings additional export income, but the widely-held perception of the UK being solely focused on income generation and growing international student recruitment now obscures the increasing complexity of institutional approaches to internationalisation. The benefits of outward mobility, internationally-collaborative research and internationalised curricula both for international and home students are increasingly valued.

The UK has long been compliant with the Bologna Process and is a major contributor to the EHEA, and thus is well placed to support the EU's internationalisation agenda. There is strong institutional engagement in inward mobility, teaching and research collaboration within EU programmes and beyond the EU, including developmental and capacity building projects.

13.2. Higher education system of the United Kingdom: An overview

UK HE is not characterised by a division between universities and universities of applied science as in some other European countries, but rather between universities and tertiary providers which are unable to award their own HE qualifications. The shift toward a student-led, market-based system in England since higher tuition fees were introduced in 2012, strongly influences the UK's relatively low level of public expenditure on tertiary education (at 30 %) compared with the rest of the Organisation for Economic Co-operation and Development (OECD) countries (Higher Education Statistics Agency - HESA, 2014).

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[40]   The authors would like to acknowledge the valuable contribution of Professor Robin Middlehurst (Kingston University) and the following organisations in verifying the content of this report: the Higher Education Academy, the UK Higher Education International Unit, the British Council, and the Higher Education Funding Council for England.

The four devolved administrations have responsibility for setting the level of tuition fees for UK/EU and non-EU students. Non-EU students in the UK pay full-cost fees, which are unlimited and set by universities, and there is no limit on how many non-EU students can be recruited. This means that they represent an important income stream for institutions since they are the only category of students whose fees can cover more than the cost of teaching them. EU students studying in the UK pay the same fees as home students studying in each UK country. Currently, in Scotland there are no tuition fees, £3 685 in Northern Ireland, and up to £9 000 in England and Wales. UK and EU students also have access to government loans to help pay tuition fees and living costs. Fee levels for UK/EU students are capped at £6 000 in the private sector. These distinctions are important because the fee levels in each UK country influence both inward degree mobility from the EU, and outward degree mobility from the UK. Currently, higher education institutions (HEIs) have capped numbers for UK/EU students. This cap will be removed from 2015-16, meaning that HEIs are likely to target EU markets as well as non-EU.

In the UK, HE covers all educational provision from levels 4 to 8 of the national qualifications frameworks (QAA, 2008; Scottish Credit and Qualifications Framework, n.d.) encompassing short-cycle through to third-cycle of the Framework for Qualifications of the European Higher Education Area (QAA, 2008b). Included are:

- Research degrees
- Master's degrees
- Bachelor's degrees
- Postgraduate diplomas and certificates
- Short-cycle qualifications such as Foundation degrees
- Diplomas in HE validated and awarded by HEIs
- Higher National Diplomas and Certificates awarded by Pearson (a private company)

There are three main types of HEI in the UK: universities; university colleges; and colleges of higher education. These are strictly controlled by government, including the level of qualifications they are able to award. All HEIs are involved in research, but there is significant diversity in terms of:

- mission
- strategy
- ownership
- size
- subject specialisms
- student profile
- fee levels
- focus on teaching and knowledge transfer
- research intensity
- approach to internationalisation
- international collaboration
- TNE

HEIs offering UK degrees must meet strict criteria to be awarded the title 'university', a process controlled by the Quality Assurance Agency (QAA) on behalf of the Privy Council. Some non-UK HEIs operate in the UK but they cannot offer UK qualifications without partnering with a UK HEI. They can only call themselves universities by making it clear that they offer only non-UK degrees in their own name.

All UK HEIs are technically private (as defined by the OECD), although government-funded universities and colleges dominate in terms of enrolments. The UK government describes

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HE providers run privately and not in receipt of recurrent public funding for teaching and research as 'alternative providers' and private institutions term themselves as 'the independent sector'. Alternative providers can access public funding for designated HE programmes, enabling any UK and EU student they recruit to access tuition and living cost support. They can also partner with publicly funded universities to allow them to award UK degrees. At present they are unable to access public research funding, for example via Research Councils (Woodfield, 2014).

Around seventy (Matthews, 2014) publicly funded HEIs also partner with private sector educational organisations (e.g. INTO, Study Group, Navitas) for delivery of pathway programmes primarily designed to prepare international students for entry into degree level studies, and in some cases delivering part of the undergraduate programme.

13.3. Supranational programmes: European and global orientations

The UK HE International Unit (IU) undertakes policy engagement on behalf of the UK HE sector related to EU policy, the development of the Bologna Process and other government-to-government relationships outside the EU. The IU is 'sector owned' but funded by Government departments, funding councils, sector agencies and representative bodies. It works closely with the British Council to facilitate such engagement (British Council, 2013a; IU, n.d.). The British Council also works to connect the UK with global higher education initiatives (see below for more detail). The British Council is a government-funded charity, but also generates income from its services to governments, institutions, organisations and individuals (e.g. teaching and exams).

The HE-focused activities of the British Council and the IU are formalised in an agreement (British Council, 2013a) which covers shared areas of concern such as academic mobility, international partnerships, policy dialogue and conducting research into these aspects of international HE. Both IU and British Council manage the sector's collaboration with other national rectors' conferences and international organisations, in particular, ACA, DAAD, the Institute of International Education (IIE), Universities Australia, Nuffic, and Campus France.

As one of the original four signatories of the Bologna Process, the UK HE sector has largely supported and been compatible with EU HE modernisation and internationalisation for some time. Institutions have not had to make substantial changes to align with European policy developments. The UK is also particularly experienced in some areas – notably quality assurance and transnational education – and has been able to support EU internationalisation on these topics.

Although much of the UK's HE focus goes beyond Europe, European funding schemes offer an important source of income and inward student flows while enabling academics to engage in knowledge exchange, research collaborations and sharing of good practice. The value of the EHEA and the ERA to the competitiveness of UK HEIs recognised particularly in research income, but the educational dimension of EU policy (e.g. mobility and student recruitment) has been less of a focus for most HEIs. Although many have dedicated offices to support bids for European funding and to manage Erasmus mobility, student recruitment has been of less interest because of the historical differentiation of fees (see previous section).

13.4. National policies

The development of international education as a business in the UK can be traced back to 1980 when full fees for international students were introduced. In the 2000s two successful

government-funded Prime Minister's Initiatives (PMIs) for international education focused on growing international student numbers, and helping HEIs develop overseas partnership activities along with support services for students. More recently, government funding has reduced as the sector has become increasingly self-sufficient and successful, facilitated in part by sector-wide organisations. These include the British Universities International Liaison Association (BUILA, n.d.), which supports the work of university international offices (largely focused on recruiting non-EU students), and the UK Council on International Student Affairs (UKCISA, n.d.). UKCISA is an important lobby group in international education. It also provides information to international students about studying in the UK, supports institutions in understanding governmental regulations related to international student recruitment (e.g. immigration and visas) and protects the interests of international students.

International education has taken on growing importance as a service industry in response to the recent global financial crisis and, as one of 13 key sectors identified as drivers of economic growth, is now a central part of the current Coalition Government's 'industrial' strategy (HM Government, 2013a). This clearly positions the UK, from a government perspective, as focusing on competitiveness and trade as far as international education is concerned. The strategy covers all levels of education and, in addition to promoting increased international student recruitment to the UK and offshore through transnational education (TNE) arrangements (including wholly online), also focuses on supporting international collaboration (education and research, promoting outward mobility of UK students, and export of educational services to other countries (HM Government, 2013b).

As in many other countries, the UK government supports scholarship schemes to attract highly qualified international students (Commonwealth Scholarship Scheme, Chevening Scholarships). Alongside Erasmus, the UK government also works with international governments, policy agencies, and company scholarship schemes (e.g. Science without Borders in Brazil, Santander Universities, and the US Fulbright Scholarship Scheme).

The UK Government claims to support universities in attracting high quality students and the soft power (Mellors-Bourne et al., 2013) they wield on behalf of the UK when they return home. Similarly, it endorses UK HE sector initiatives to engage in overseas capacity building activities (see section 7.8).

And yet immigration policy and curbs on post-study work visas instituted by the Home Office have presented an image of the UK as being unwelcoming to international students. It remains to be seen whether this will have a long-term impact on incoming students. However current indications are that, although students in some countries have been deterred from studying in the UK, recruitment has remained strong (HESA, 2014).

13.5. Key stakeholders and funding schemes reflect governmental and sector-level interests

Although the details and tone of government policy on international education differ across the four UK countries, they work closely at HE system level, and policy documents tend to link national policies to broader UK concerns. This recognises the UK-wide market for students, staff and resources and a 'UK' brand for marketing UK education overseas. The quality assurance system is also UK-wide (with national variations), as are student admissions and data collection.

Key UK-wide government-funded organisations with an internationalisation element in their work include:

- Higher Education Statistics Agency (HESA): data collection

- Universities and Colleges Admissions Service (UCAS): admissions

- Student Loans Company (SLC): government financial support to students

- Quality Assurance Agency (QAA): academic standards and academic quality of HE programmes (including TNE)

- Professional, Statutory and Regulatory Bodies (PSRBs): regulation of professional programmes

- Leadership Foundation for Higher Education (LFHE): leadership and management development and research

- Higher Education Academy (HEA): quality enhancement of learning, teaching and student experience

The HEA has produced publications and resources to support those working with international students. More recently its Internationalisation Frameworks designed to support wider internationalisation of the curriculum for all students by preparing 'all graduates to live in, and contribute responsibly to, a globally interconnected society' (HEA, 2014, p. 1).

Other influential representative organisations, which seek to lobby government and help shape and develop policy, with a part remit on internationalisation:

- National Union of Students (NUS)

- Universities UK (UUK)

- Guild HE

- Universities Scotland

- Universities Wales

The UK has no 'peak body' on international education but the IU, the British Council and UKTI Education all undertake extensive activity to support internationalisation. UKTI (UK Trade and Industry) Education is a government agency (part of the Department for Business, Innovation and Skills), which focuses on helping educational institutions to export their expertise internationally via large-scale, high-value, multi-sector projects. Its work covers schools, technical and vocational education and training, HE, education technology, and English language training.

At sector level the IU, in addition to work described above:

- acts as a central observatory, intelligence and delivery unit on HE internationalisation and policy developments;

- works closely with other agencies representing institutional interests in Europe, Association of UK HE European Officers (HEURO), UK Research Office (UKRO), Welsh Higher Education Brussels (WHEB);

- works with the European Universities Association (EUA);

- has a strong focus on supporting UK HEIs to access EU HE funding programmes, e.g. Erasmus+, Horizon 2020 and via the European Research Council (ERC).

The IU represents the sector, or the supply side of UK participation in international HE. In contrast the British Council's global presence and expertise can articulate demand – how and where other countries may usefully partner or engage with UK universities. As the UK's cultural relations agency, it has worked closely with institutions, both UK and overseas, for over 70 years, and in a variety of ways:

- convening global policy dialogues;

- facilitating inward missions;

- managing mobility and partnership programmes;

- initiating and facilitating dialogue at a policy level;

- promoting inward and outward student mobility;

- through Services for International Education Marketing (SIEM), supporting international student recruitment, market intelligence, and international collaboration;

- helping develop international teaching partnerships and collaborations;

- facilitating and promoting international research collaboration, researcher mobility and early career researchers;

- developing and implementing two MOOCs as a partner in Futurelearn.

13.6. Institutional policies: significant diversity coupled with notable trends

As noted earlier, the UK HE sector is highly diverse and it is difficult to make general statements about institutional policies, since much is anecdotal. There is no requirement for HEIs to have international strategies or to share them.

Fielden (2008) suggests that UK institutions are taking a more comprehensive approach to internationalisation, and that international offices are moving to a 'core plus' model in which they take more responsibility for a wider internationalisation strategy across the institution. UK HEIs are complex, often with devolved management, so there can be a significant gap between corporate strategy and implementation at local levels. Many faculties, especially business schools, have their own approaches to internationalisation.

The prime internationalisation focus since the early 1980s has been international student recruitment either directly to the UK or via transnational education (TNE) or offshore delivery of UK programmes, of various types. The last two decades have also seen a significant increase in TNE to reach a different group of students from those who wish to travel to the UK for their entire programme of study. Several universities have established international branch campuses. Others deliver with partner institutions, 'collaborative provision', or through a combination of delivery methods which may also include distance learning (Mellors-Bourne et al., 2014).

In recent years, the importance of high student satisfaction has come into focus, both in domestic and international markets, because of the emphasis on quality through the QAAas well as global and domestic league tables. The strength of word-of-mouth marketing, along with the potential of social media to escalate experiences of poor quality, has seen UK universities make substantial efforts to enhance the student experience across the full range of their activity. This has led to a focus on graduate outcomes including employability

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(Jones, 2013). It has also stimulated an interest in global citizenship and a focus on 'global graduates', in curriculum internationalisation and quality enhancement of teaching, learning and assessment. The experience of international students is seen as a key marketing tool and many UK institutions use i-graduates (n.d.) to measure and benchmark the international student experience. This has helped to improve dramatically the services provided for international students.

Apart from the business dimension there has also been a focus on the development of global perspectives and internationalisation of the curriculum at home for domestic students and a rich literature has emerged. This values-driven dimension of internationalisation has been drawn upon to counterbalance the commercial aspects of international student recruitment as reflected in the HEA's Internationalisation Framework (HEA, 2014) noted above. While this is yet to yield results, it adds to existing good practice and extensive literature by UK-based authors in internationalising the curriculum and working with international students (amongst others Carroll, 2015; Clifford and Montgomery, 2014; Jones, 2010; Jones and Killick, 2013; Killick, 2015; Montgomery, 2010; Turner and Robson, 2008) and the Higher Education Academy has produced excellent resources related to the 'lifecycle' of an international student (HEA, n.d.). In spite of the challenges, many HEIs consider themselves international/global institutions, despite the absence of internationalised curricula (Warwick and Moogan, 2013).

13.7. Key performance indicators: Mobility, research, TNE and partnerships

The principle of autonomy is strong in UK HE and there are no national KPIs other than the 20 % mobility target commonly referenced in the European context. HESA collects detailed data on students and staff from over 160 publicly funded degree awarding bodies and one privately-funded institution (University of Buckingham), but data on the rest of the 'independent' sector (i.e. the UK equivalent of the private sector) is not collected systematically. The number of students across the system in 2012-13 was as follows (HESA, 2014a):

- 186 455 students studying for HE qualifications in the FE sector (mainly short-cycle programmes)

- 160 000 students studying in over 600 HE institutions not funded directly by government (CFE, 2013)

- 2.34 million students in the government-funded HE sector

Total number	2.34 million	Full time	72 %
UK	82 %	Part time	28 %
EU	5 %	Undergraduate	77 %
Beyond EU	13 %	Postgraduate	23 %

International student recruitment has been a UK success story, but recent government policy has shifted to include other forms of internationalisation. For example, the 2013 policy to increase participation in outward mobility by UK students, and the introduction of policies to promote language learning in schools to support this. Furthermore, immigration-related policy barriers have led government to encourage forms of internationalisation beyond academic mobility to the UK (e.g. TNE and MOOCs), and to maintain reputation through a QAA focus on provision delivered outside the UK. The value of soft power influence and reputational benefit from students who have studied in the UK returning to their home countries has also been recognised (Mellors-Bourne et al., 2014).

13.7.1. International students in the UK

The UK currently ranks second at 13 %, behind the USA in global market share of international students (OECD, 2014), as illustrated in the table below. International enrolments are dominated by vocational subjects, such as business, engineering, computing and law. All international students in the UK are expected to study in English.

Table 6: International students

Year	1972	1992	2012
Number of International Students	44 100	107 090	435 235

Source: British Council (n.d.)

2012-13 saw a slight fall in enrolments to 425 265, largely due to tighter visa restrictions especially post-study work visas. However, the trend towards growth has remained strong (British Council, n.d.). Numbers from India and Pakistan dropped significantly in 2012. 13. 5 % of all HE students were from non-EU countries. Recruitment from China (83 790) was over three times that of India (22 385 students). In the same year, there were also over 15 000 international students studying in the UK from each of three non-EU countries (Nigeria, the USA and Malaysia), along with over 10 000 students each from the EU countries of Cyprus, France, Germany, Greece and Ireland (HESA, 2014a).

At postgraduate level non-EU students represent 29 % of all students (HESA, 2014a). The importance of non-UK recruitment at the postgraduate level is shown by the fact that 58 % of graduates from full-time PG programmes (46 % non-EU, 12 % EU) were international students in 2012-13.

As far as research degrees are concerned, the proportion of graduating students in 2012-13 was 56 % UK, 14 % other EU, 30 % non-EU (HESA, 2014a). This highlights a strong sector reliance on recruiting international students at this level of study and explains the importance of international recruitment activities to institutions.

13.7.2. Outbound student mobility

A lack of robust data makes it difficult to measure the full extent of outward student mobility from the UK, particularly for degree mobility, estimated at 22 405 in 2006 (Findlay and King, 2010), but outside the scope of national data collection. However, anecdotal evidence suggests that the numbers of students studying for a full degree abroad is increasing year on year, with students travelling to English-speaking countries or to programmes delivered in English (mostly within the EU).

For credit mobility, Erasmus data is publicly available, but census data on all forms of outward credit mobility (including beyond Europe) was only collected for the first time in 2013-14, to support the UK Government's Strategy for Outward Mobility (IU, 2013a), and is not yet publicly available. The International Unit and the British Council are working together to facilitate the implementation of this strategy through initiatives such as the Generation UK programmes (in China and India), and the Study Work Create website (British Council, 2014a). The UK still has a significant net inflow of credit mobility. However, an annual outward mobility survey suggests a continuing growth trend in outward UK credit mobility and, since work placements have been included in Erasmus data, UK participation has now reached its highest ever level. Carbonell (2014) estimates total UK outward credit mobility at 23 078 in 2012-13, including 7 056 students travelling outside the EU schemes. The five most popular destinations (hosting over 1 000 UK-enrolled students) are France, Spain, the USA, Germany and Italy, and students tend to study in the language of the destination country. This represents a participation rate of around 6 % compared with the EHEA target of 20 %. In the academic year 2012-13, the Erasmus programme funded study or work placements for a record 14 651 UK students and 2 123 UK HE staff.

The majority of mobile UK students go abroad for a full academic year during their undergraduate degree, since this allows them to receive government financial support, and is easier to align with studies in four-year degree programmes. The main subject areas for UK outward mobility are languages, law, business and art and design. Many other programmes also contain a language dimension and outward mobility is dominated by students with strong foreign language skills.

13.7.3. International staff (inbound and outbound)

HESA data shows that in publicly-funded institutions in 2012-13 18 % of staff members whose nationality is known (373 780) were from outside the UK (10 % from the EU). Data is not publicly available on staff nationalities in the UK. However, amongst staff with academic contracts, 26 % were international, and 14 % were from the EU, suggesting a significant level of international staff recruitment in the UK HE system. Amongst professional support staff, only 9 % were of non-UK nationality.[41] The UK is also one of the top five receiving countries for Erasmus staff mobility.

13.7.4. International research

European research partnerships have significantly contributed to the large proportion (80 %) of internationally co-authored papers that are written with partners from other EU countries.

Current focus in relation to international research:

* international competition for research contracts and skilled researchers;

* the global nature of research challenges that require leverage of multi-national research capacity;

* the need to seek funding from non-UK sources that require international collaboration to diversify income streams (currently 22 % of all research income is from outside the UK[42]);

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[41]   HESA data for 2012/13. Only freely available to subscribing institutions.
[42]   HESA Finance Record, 2011/13 data.

- capacity building and knowledge transfer activities built around research in developing countries;

- increasing research collaboration to enhance access to knowledge, technology and expertise;

- building reputation and performance metrics such as citations, indices and peer reviews (which value internationally collaborative research) to help improve sector positioning in international research quality rankings.

13.7.5. European and other supranational programmes

UK HEIs are heavily involved in European funding schemes in relation to education, capacity building and sector reform (Erasmus+) and research (Horizon 2020). The UK has the highest participation in Erasmus Higher Education Cooperation projects across the EU, and between 2007 and 2013 there were 540 projects where UK institutions were involved as partners or coordinators (European Commission, 2014).

In 2011-12 the UK HE sector received 21 % of its research and consultancy income from international sources, including 13 % from the EU (mostly via FP7). European research grants contributed 2.4 % of UK universities' income in 2012-13 (HESA, 2014b). Framework 7 funding was equivalent to around 15 % of the UK's science budget, making the UK the second largest beneficiary of EU research funding after Germany. Under FP7, the UK has received almost EUR 7 billion, or 15.5 %, of the funding allocated, and the HE sector has secured over 60 % of the funding allocated to the UK under FP7.

However, the UK has been less engaged in other EU programmes (i.e. those now covered by Erasmus+) than other large European nations. The UK is a net host of Erasmus students, although its new Outward Mobility Strategy (IU, 2013) is seeking to support institutions to increase the mobility of UK students (and staff) and help the EHEA to achieve its target of 20 % of students having a mobility experience by 2020. Erasmus is currently the single biggest source of funding for UK students and staff wishing to work or study abroad.

13.7.6. Language of instruction

Poor foreign language skills are often cited as one of the reasons for the UK's relatively weak record on outbound student mobility (British Council, 2014b). However, as increasing numbers of European countries now offer programmes delivered in English, along with the traditional English-speaking non-EU destinations of Australia, New Zealand, the USA and Canada, this should no longer be an impediment. UK students should not be absolved from learning other languages however, and the government is currently placing emphasis on increasing the number of students studying languages. The All Party Parliamentary Group on Modern Languages launched its Manifesto for Languages in July 2014 (British Broadcasting Corporation, 2014), and since September 2014 the National Curriculum has made it compulsory for children in England, aged 7 and above, to learn a foreign language.

13.7.7. Transnational Education (TNE) campus operations

Besides Australia, the UK HE sector is one of the dominant players in the global market for TNE, and collects the most detailed data on this type of HE provision in the world (British Council, 2013b). TNE is the subject of ongoing research projects at government level which seek to understand better the nature and value of this kind of activity. Currently HESA collects annual data on TNE enrolments in UK HEIs at institutional level, and concerning the

different types of TNE activity, countries of delivery and levels of study via the Aggregate Offshore Record (AOR). The UK is also a host country for TNE programmes offered by other countries such as the USA and Malaysia, although there is no sector level data collection on such provision.

A recent report estimates TNE revenue for the UK for 2012-13 as £496 million (Mellors-Bourne et al., 2014). The report notes that TNE represents around 11 % of total international higher education fee revenues to the UK and the proportion of total TNE activity and revenue delivered through distance learning exceeds that through partnership arrangements. Courses in business, finance and management accounted for nearly half of all active TNE enrolments. Masters programmes in this subject area represented 56 % of all TNE revenues, and MBA programmes alone £186 million. Growth in TNE is likely to continue on the basis of reported intentions by UK institutions, many of which are keen to increase their activities.

In 2012-13, 598 925 students were studying wholly overseas for UK HE (and some FE) qualifications, mostly in Asia (Malaysia, Singapore, China, Pakistan and Hong Kong) although a significant number of students were studying in Europe (predominantly in Germany, Greece, Ireland, Russia and Switzerland) (HESA, 2014c). However, these figures are distorted by a large number of students enrolled at one particular institution even though they are not actively studying, and excluding such students provides the more accurate figure of 337 260 enrolments, including approximately 160 000 studying in Asia, 45 000 in the Middle East, 40 000 in Africa, and 67 000 in Europe. Most UK TNE (58 %) is delivered collaboratively with overseas partner institutions through a range of different arrangements (including validation arrangements, franchises and flying faculty) or through some form of distance or flexible learning (36 %). A small number of UK universities have also established branch campuses (mainly in China, Malaysia and the UAE) that enrol 17 520 students. The vast majority of UK TNE is provided at bachelor's level (62 %) although there is also strong demand for the UK's one-year taught master's programmes (29 %) in Asia, Africa and the EU (HESA, 2014c).

34 %(16 500) of all international first degree entrants in 2012-13 were recruited from TNE courses delivered overseas by UK HE providers, or partners working on their behalf. China and Malaysia accounted for the majority of such students (Higher Education Funding Council - HEFCE, 2014b, p.1). These are students who begin their studies overseas and then transfer to the UK.

TNE is a success story for the UK and is evolving and growing to include most UK universities. It contributes to capacity building and access to HE worldwide through providing quality assured routes to UK qualifications. The UK is innovative in TNE, using a range of models including partnerships, highly regarded branch campuses and long-established and innovative distance learning provision.

13.7.8.   Capacity building in developing countries

The Department for International Development (DFID) supports development-focused research and capacity building projects in developing countries. Between 2006 and 2013 DFID supported around 200 partnerships through the British Council managed Development Partnerships in Higher Education (DelPHE) programme, mainly in Africa and Asia. The DelPHE partnerships aimed to help reduce poverty, promote science and technology and meet the Millennium Development Goals.

The UK HE sector also engages in a range of collaborative partnership programmes focused on developing and emerging economies such as the Global Innovation Initiative (GII). This is a shared commitment of the United Kingdom and the United States to strengthen research collaboration between universities in the UK, US, and emerging economies such as India, Brazil, China and Indonesia. Other collaborative funding schemes coordinated and managed by the British Council included: UKIERI, an ongoing, co-funded partnership between the UK and Indian governments which between 2011-14 supported 208 Higher Education Partnerships involving over 400 institutions in the UK and India to undertake joint research, curriculum development and programme delivery; the INSPIRE project that aims at strengthening academic and research partnerships between UK Higher Education Institutions (HEIs) and HEIs in Afghanistan, Bangladesh, Kazakhstan, Pakistan and Uzbekistan.

In addition, the new Newton Fund was launched in 2014 as part of the UK's Official Development Assistance (ODA) strategy. Delivered by the British Council, its aim is to develop science and innovation partnerships that promote the economic development and welfare of developing countries through collaboratively funded research and development projects. Many of these will involve students and researchers from the HE sector.

13.8. Future focus at the national and institutional levels

Various key authorities in the UK have been mentioned previously in this report in relation to the three distinct dimensions of internationalisation:

1. Economic (including research and enterprise activities);
2. Educational;
3. Capacity building.

Future focus at national level

National government priorities and funding cuts will clearly continue to direct most universities' interests towards economic activity in terms of income generation, influence and international research collaboration. Although recruitment is global, government focus related to influence and collaboration centres on BRICS (Brazil, Russia, India, China, South Africa) and CIVET countries (Colombia, Indonesia, Vietnam, Egypt, Turkey), though not excluding other countries and regions. A historically weak policy emphasis on the educational dimensions of internationalisation and its potential for quality enhancement - both 'at home' and 'overseas' - is a natural result of this narrow economic focus. However, the recent draft business plan by HEFCE (HEFCE, 2014a) focuses on English HE's place in the global HE system, and recognises the value of developing policy and regulation based on international comparisons, and international collaboration in teaching and research. It also highlights the benefits of academic mobility and developing a 'global mindset' for graduates.

Recent policy trends and future developments at national level include:

1. Protecting the UK's reputation for high quality education and engendering trust in the UK HE 'brand' overseas via positive study experiences and alumni links;

2. Growth in government-to-government HE partnerships;

3. Promotion of more institutional level teaching partnership activity by the IU and the British Council;

4. Increasing funding for public and private sector collaboration in consultancy-based, capacity building activity in countries with under-developed HE systems;

5. Supporting international research collaboration and HE exports.

At the institutional level, student recruitment will remain a strong focus, as will TNE, although different models will evolve which are adapted to market conditions. The structure of HEIs suggests that teaching and learning initiatives in internationalisation will be more bottom-up than top-down, remaining in faculties and disciplines, as senior management focus will remain on income generation and rankings/reputation. However, the growing emphasis on the student experience may provoke a stronger interest in the 'academic' experience of students as it relates to employability in a globally connected world, including a more explicit focus on achieving internationalisation of the curriculum. We suggest that:

- Institutions will remain diverse in their approaches to internationalisation, while retaining a strong focus on maintaining a reputation for educational quality.

- Institutions will also seek to maintain strong market share in non-EU recruitment and to grow EU recruitment.

- Partnership-based TNE will shift to collaborative models where the UK partner has more control over academic quality and student experience. Branch campuses will remain a small (yet significant) dimension of UK TNE, whilst distance learning provision overseas will continue to grow as online technologies develop.

- Growing engagement with the HEA Internationalisation Framework at discipline level, focusing on curriculum, graduate employability, internationalisation of home campus, support for academic benefits of outward mobility. The policy focus in these areas is stronger in Scotland than in other UK countries. Senior management commitment will be crucial.

- Research focused HEIs will continue to focus on internationally collaborative research to sustain competitiveness and reputational indicators such as rankings.

- Trends towards increasing engagement in project-focused international collaborations will continue, although some institutions will increasingly engage with more strategic partnerships and alliances for teaching, research and knowledge transfer.

- Ties with the EU will remain strong in relation to mobility and research, but the sector's attitude to European linkages must be understood in terms of the government's global focus on engagement with BRICS and CIVET countries.

- Recent investment by DfID is likely to stimulate increased engagement in capacity building activities in target countries.

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14.   AUSTRALIA

Dennis Murray and Betty Leask

14.1. Introduction

Over the last half Century, and particularly over the past 25 years, Australian higher education institutions (HEIs) have been actively engaged in internationalisation. No Australian university has been left untouched by the process. The main focus has been on international student recruitment, teaching and support, although there has also been significant international engagement by Australian university researchers. On many measures, Australian universities are amongst the most internationalised in the world.

There is considerable diversity in approaches to internationalisation in Australian universities. However, in the last decade there has been a growing understanding of the need for Australian university education, training, research and service to be more deeply and effectively engaged on a global scale.

A 'comprehensive' approach to internationalisation is gaining momentum in Australia and poses challenges both within the academy, in terms of strategic, managerial and financial alignment and coherence across the institution, and externally, in terms of a supportive public policy framework. Some universities have already successfully aligned and integrated internationalisation across all of their core missions. For some, internationalisation is at the core of their entire strategic purpose, with the University Vice-Chancellor/President assuming leadership responsibility for internationalisation. In the last decade, there has been an increased focus on internationalising the learning outcomes of all students through curriculum redesign focused on the development of graduate capabilities. On the other hand, many Australian universities have further yet to go.

While, through their own agency, HEIs have shaped and driven internationalisation to achieve desired institutional purposes, fundamentally the trajectory of international education in Australia has been framed by government policy settings. National supply side policies, especially public underfunding of the higher education system, combined with a national effort to market Australia's education export services and a heavily regulated approach to quality assurance and to the student visa regime, have largely shaped the approach that Australian universities have taken to internationalisation. It is a narrow focus and it will be inadequate in the future.

14.2.   The Australian Higher Education System: A ''unified'' system with substantial diversity

Although Australian HEIs are constituted under separate Australian State Acts, the Australian Government is the primary source of public funding for higher education. HEIs operate under a 'unified national system' (UNS) introduced in 1987, establishing direct government contacts with individual institutions.

The 1987 reforms were designed to improve both the efficiency and international competitiveness of Australian universities (Higher Education Funding Act 1988) as well as reducing the Government's contribution to the cost of university tuition. As a result of the reforms the proportion of all funds from government fell from 85 % in 1987 to just 55 % by 1998 (Marginson and Considine, 2000).

The Australian higher education system currently comprises 38 public and 3 private, independent, self-governing universities and HEIs. While the system is said to be 'unified'

there is substantial diversity. The large research-intensive universities tend to be located in major metropolitan centres. They include the older, well-established 'sandstone' universities as well as the larger technical/applied universities (which also have a research focus). While some smaller universities are also in the major cities, many are in rural areas across the country. Diversity of focus and mission, student composition, funding strength and external involvement are evident across the system. However, all universities have a research mission, aspire to high quality research and teaching and are actively engaged in internationalisation. In 2014, 4 Australian universities were ranked in the top 100 in the Academic Ranking of World Universities (ARWU), 8 in the top 200 and 19 in the top 500.

Australian HEIs are responsible for managing quality through internal accreditation processes and codes of practice. Universities are also subject to a wide range of government legislation.

All institutions receiving Australian Government financial support must meet quality and accountability requirements set out in the Higher Education Support Act 2003. All Australian higher education providers are also required by legislation to comply with threshold standards determined by the Tertiary Education Quality and Standards Agency (TEQSA), Australia's independent national regulator of the higher education sector.

14.3. Key regions of engagement and influence: Europe and Asia

14.3.1. Europe

Australia and the EU participate in annual policy dialogues to exchange best practice on policy areas of interest to both sides. Dialogues also produce joint follow-up measures. Australia and the EU have undertaken six policy dialogues to date: Higher Education Reform (2009), Qualifications Frameworks (2010), Early Childhood Education and Childcare (2011), Internationalisation of Education (2012), Quality and Recognition (2013) and Lifelong Learning (2014).

The 2012 policy dialogue on international education in Brussels focused on quality in international education, student mobility and student wellbeing. Key measures agreed included: a forum on the role of education and training in preparing for participation in the workforce; a continuation of bilateral academic co-operation projects; hosting a significant alumni networking event in Brussels in conjunction with alumni networks, as well as a pre-departure workshop for Australian students going to Europe; and a joint expert seminar on mobility.

A major consequence of Australia's interest in the Bologna Process has been the development of an Australian Higher Education Graduation Statement (AHEGS) that, like the European Diploma Supplement, aims at making Australian qualifications better known internationally, thereby enhancing the international mobility of graduates from Australian universities. The Graduation Statement is issued without cost to all higher education graduates.

Ten Australian universities participated in the OECD project, the Assessment of Higher Education Learning Outcomes (AHELO), examining student learning outcomes across institutions internationally in generic skills, Economics and Civil Engineering.

The Australian higher education quality agency and a number of Australian universities have been involved in the Quality Assurance of Cross Border Higher Education (QACHE) project examining the different ways in which quality assurance agencies and higher

education institutions (HEIs) address the accreditation and quality assurance of programmes delivered outside their countries.

In July 2014, the European Union (EU) announced its investment of EUR4.6 million (AUD$6.6 million) to establish six EU centres at universities across Australia (five) and New Zealand (one) for the 2014-2016 period (European Union, 2014). The centres are co-funded by their host universities and include a range of partners from the community. The initiative shows the commitment of the EU to Australia (and New Zealand) and the reciprocal enthusiasm and commitment on the part of the universities and the broader community.

14.3.2. Asia

At the same time, Australian public policy and Australian HEIs have an understandable, deep and abiding focus on Asia. There are a number of supranational agreements and associated programmes with Asian countries involving shared regional priorities, including higher education. Australia is a foundation member of the APEC (Asia-Pacific Economic Co-operation) Forum and for over forty years a dialogue partner of ASEAN (The Association of Southeast Asian Nations) both of which, amongst other things, seek to raise education levels through sustainable economic growth. There are also multiple bilateral arrangements for higher education co-operation between Australia and individual nations in Asia, especially Brunei, China, India, Indonesia, Japan, Malaysia, the Republic of Korea, Taiwan, Thailand and Vietnam.

Over the past four years Australian governments have focused on two areas of critical significance for international education: exploring deeper engagement with Asia (reflected in the 2011 Henry White Paper, Australia in the Asian Century) and the development of a comprehensive international education strategy for Australia (reflected in the 2012 International Education Advisory Council report, Australia Educating Globally).

The Asian Century paper was commissioned with the explicit aim of promoting and supporting a repositioning of Australia to succeed in 'the Asian Century', 'to shape our future rather than drift into it' (Commonwealth of Australia, 2012). While Australia in the Asian Century touched on education in a general manner, it pointedly left the details of an international education strategy to the International Education Advisory Council appointed in 2012 under the chairmanship of Michael Chaney AO. The 'Chaney report', Australia - Educating Globally (DIISR, 2013) affirmed a co-ordinated, whole-of-government approach, an industry consultative mechanism, effective quality assurance, enhancement of the international student experience, stability in the critical policy settings and the recognition of the importance of research to underpin development of the sector. Two years after the report was handed down, the education sector still awaits the Australian Government's response (see the concluding section of this report below).

14.4. National policies

14.4.1. Broad policy stances and trends

Over the past sixty years, history and Australia's geographical location in the Asia-Pacific region have been the drivers of Australia's public policy approach to international education. Seven identifiable phases in which the Australian Commonwealth (national) Government has played a role in the development of international education in Australia are identifiable (Gallagher, 2011). During this period Australian governments have not

attempted to articulate an international education strategy as such. The approach has been more one of pragmatic response to emerging circumstances. Nevertheless, through the application of a variety of policy levers, Australian governments have exerted considerable influence over the direction international education has taken in Australia.

While Australia has enrolled international students for over one hundred years (Goldring, 1984), February 1986 marked the launch of Australia's aggressive commercial venture into trade in education services. In that year, entry procedures for overseas students were streamlined and educational institutions in Australia were required to market their courses on a full cost basis.

Initially, institutions were left largely to themselves to establish market access and to work out the rules and modes of operating in foreign jurisdictions. The Australian Government relied on a high degree of self-regulation by the education industry and institutions. However, in 1988 the Government introduced a national code of conduct for marketing Australian education overseas, individual industry codes of ethical practice, and a State Government registration system. The commercial focus of Australia's international education effort – growth in overseas student enrolments - remained the paramount objective and remains a major driver.

Beginning in 1998, Australian public policy produced a complex nexus between the overseas student programme and skilled migration that opened up commercial opportunities for new, especially private education providers in the non-university sector. This resulted in pockets of poor quality provision of education and other services to international students, and in profiteering and malpractice by some providers. The period from 2005 to 2010 saw increasing dependency of Australia's international education on the migration nexus and renewed exposure of the sector to corruption. The failure was one of enforcement rather than regulation.

A corrective phase began in 2010 and continues. The perverse policy incentives influencing student choice, in particular the tight nexus between international education and migration to Australia, were eliminated and the regulatory and compliance enforcement framework strengthened. Since 2010 the role, scale and shape of international education have effectively been re-calibrated.

Nevertheless, the period 2010-2012 saw an unprecedented, sharp decline in international student applications and enrolments in Australia as a result of systemic failures. Total international enrolments across all education sectors declined by almost one-fifth (18.1%). The value of international education as an export dropped from its peak of $19.1 billion in 2009/10 to $14.108 billion in 2012/13 (Australian Bureau of Statistics, 2014a). These downward trends have now begun to be reversed (see below).

14.4.2. Legislative settings

The Australian Government applies two primary legislative instruments to regulate the export of education. The Immigration Act 1958 maintains the integrity of the student visa programme by aligning student visa requirements to the immigration risk posed by applicants from a particular country studying in a particular education sector. At the same time, the Act provides for streamlined visa processing and generous work rights, reflecting the Australian Government's recognition of the importance of Australia's education export sector. The Education Services for Overseas Students (ESOS) Act 2000 and its associated instruments -the National Code of Practice, the CRICOS Register and the Tuition Protection

Service (TPS) - govern the registration process and obligations of registered providers, including HEIs, delivering courses to international students.

In addition to these two instruments, a wide range of other national policies and legislation, relating especially to science, research, industry and innovation policies, impact on Australian HEI's international commitments. The relationship of these other policies and instruments to international education policy is often tangential and therefore problematic, as will be discussed below.

14.4.3. Government support structures

Since the late 1980s Australian governments have also actively supported the export of Australian education through designated units within national administrative bodies. Currently, Australian Education International (AEI), a branch of the Australian Department of Education, acts as the 'whole-of-government' co-ordinating department for international education matters. AEI is responsible for intergovernmental partnerships and MOUs, international scholarships, student mobility programmes and the recognition of overseas qualifications, and data and research in international education. The Australian Trade Commission (Austrade), a branch of the Australian Department of Foreign Affairs and Trade (DFAT), is responsible for national marketing and promotion of international education.

14.4.4. International scholarship programmes

14.4.4.1. The Australia Awards

These awards promote knowledge, education links, and enduring ties between Australia and other countries, especially countries within the region. Around 4 500 awards (scholarships and fellowships) will be offered in 2014–15, with a value of AU$362 million. The focus of Australia Awards is the Asia-Pacific region, although recipients are also drawn from the Middle East, North and Sub-Saharan Africa, the Caribbean and Latin America.

The Australia Awards are made up of three separate scholarship programmes – (i) Australian development assistance scholarships focused on developing countries especially within the Asia-Pacific region; (ii) the International Postgraduate Research Scholarships (IPRS) programme focused on attracting and financially supporting postgraduate students of exceptional research promise from around the world to undertake a higher degree by research (HDR) in areas of research strength; and (iii) the Endeavour Scholarships and Fellowships focused on citizens of the Asia-Pacific region, the Middle East, Europe and the Americas with regard to study, research and professional development programmes in Australia (and on Australians with regard to programmes overseas – see below).

14.4.4.2. The New Colombo Plan (NCP)

The 'New Colombo Plan' (NCP) is a signature initiative of the current Australian Government aimed at promoting knowledge of the Asia-Pacific region in Australia by supporting Australian undergraduate study, internships, mentorships, work placements and research in the region.

The NCP is intended to be transformational, deepening Australia's relationships in the region, both at the individual level and collectively by expanding university, business and other stakeholder links. Over time, the Australian Government aims for study in the Indo-

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Pacific region to become a rite of passage for Australian undergraduate students and an endeavour that is highly valued across the Australian community.

The Government has committed AU$100 million over five years to the New Colombo Plan. A 2014 pilot phase is currently being completed, supporting around 1,300 mobility programme students and 40 scholarship holders to study in four pilot locations – Indonesia, Japan, Singapore and Hong Kong. The intention is to implement the New Colombo Plan across the Asia-Pacific region in 2015 when numbers are expected to reach 5 000.

It should be noted that many more Australian higher education students study abroad than receive funding under the New Colombo Plan (see p. 12 below). Australian undergraduate students generally are entitled to receive a government loan OS HELP, the Australian Government's Higher Education Loan Program to help undergraduate students spend a study period overseas. OS HELP provided AU$38.3 million in loan funds to outbound Australian students in 2013 (Olsen, 2014a).

14.4.5. Transnational education policy

Australia's transnational education provision is underpinned by the Australian Government's Transnational Quality Strategy (TQS), developed in 2005 in consultation with state and territory governments, representatives of each sector and international students. The TQS aims to promote the quality and reputation of Australia's transnational education and training and so contribute to its sustainable growth. Good Practice Guides for Australian providers formed part of the strategy and have significantly assisted quality enhancement of Australian HEI's transnational academic and business strategy and procedures (Australian Education International, 2008).

14.4.6. Support for researcher international engagement

The Australian Research Council (ARC) has a well-articulated international strategy. Two core programmes support international cooperation: (i) the Excellence in Research for Australia (ERA) initiative and (ii) the National Competitive Grants Program (NCGP). A key objective of ERA is to allow for comparisons of Australia's research nationally and internationally across all discipline areas within higher education institutions. Under the NCGP, support for international cooperation is incorporated across all the elements of the programme (Australian Research Council, 2014).

International cooperation is also an important component of the ARC Centres of Excellence program. Recently approved Centre of Excellence proposals involved cooperation with 44 countries.

The National Health and Medical Research Council (NH&MRC) provides separate funding support for medical and health research in Australia. The NH&MRC Strategic Plan 2013-2015 seeks to contribute to the development of health knowledge worldwide and to improving health in the Asia-Pacific region through international cooperation. NHMRC is involved in over a dozen international multilateral and bilateral collaborative initiatives (NH&MRC, 2014).

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14.5. Other key stakeholders and funding schemes: Australian states and cities

Other key stakeholders are the individual Australian states (6) and territories (2) and their capital cities. Over the past fifteen to twenty years some States, (especially South Australia, Western Australia and Queensland) have actively supported the international education efforts of their institutions (essentially the recruitment of international students) and have jointly funded (with educational institutions) state-based semi-autonomous promotion and marketing arms such as Education Adelaide, Perth Education City and Study Queensland. Some states (e.g. Queensland, Victoria) have established overseas trade offices that, in part, support educational institutions' student recruitment activities.

In 2012 the state of New South Wales announced an International Education and Research Action Plan (Government of New South Wales, 2012). The state of Victoria's International Education Strategy 2013-2018 describes four action areas - market development, quality education, student experience and marketing and branding (Government of Victoria, 2013).

Some city and local governments throughout Australia also provide welcome and support services for international students.

These various key stakeholder initiatives are funded through state contributions. To date, within Australia, apart from a modest number of international alumni scholarships, there are practically no non-government organisations or private foundations that fund higher education international education activity.

14.6. Institutional policies: unique models, common themes

The strategic plans of all Australian universities routinely include a strong international element. However, no single model of internationalisation applies in the Australian context (Coates, Edwards, Goedegebuure, Thakur, van der Brugge and van Vught, 2013). Internationalisation is a core strategic purpose of some universities (e.g. Melbourne, Queensland, Monash) and is comprehensively addressed across the whole university enterprise. Other universities are less advanced in the comprehensiveness of their internationalisation. They may have an internationalisation plan that seeks to articulate the vision and mission of their institution in an international context but which nevertheless has a limited focus (e.g. student recruitment, some outbound student mobility).

Even so, common themes are evident and include international student recruitment, outbound student mobility, international staff exchange, global research cooperation, internationalisation of the curriculum, diversification and strengthening of the institutional revenue stream, and global grand challenges. Nevertheless, there are differences in the ways individual universities translate these common themes into action and the degree to which they are successful in doing so.

14.6.1. International marketing and international student recruitment

Australia has adopted an explicitly commercial and highly successful approach in attracting international students. It would be difficult to find an enterprise where growth has been better served through marketing cooperation and the sharing of market intelligence than Australia's international education industry.

In the late 1990s, the benchmarking of Australian university international offices began and involved cooperation between 'competing' educational institutions. Benchmarking

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institutional performance and good practice, as well as sharing results, has been critically important in improving the international activities of Australian universities and has now extended to the English language and vocational education and training (VET) sectors. This collaborative spirit between Australian educational institutions and governments has not only helped develop an industry that is a major export earner, but it has positioned Australia as one of the world's most popular education destinations (Lawrence and Adams, 2011).

Beginning in the mid-1980s, marketing initiatives included institution-funded education exhibitions and marketing trips through Southeast Asia, supported by in-country agents and the establishment of government-funded Australian Education Centres. In the 1990s activities diversified and expanded substantially to other parts of Asia, including China and India, and to the Middle East and Gulf regions. These activities included English Language Intensive Courses for Overseas Students (ELICOS), study abroad and full award (degree seeking) markets in Europe, the United States and Latin America. Pathway programmes (see below) within Australia were initiated (see below) and twinning, articulation programmes (providing pathways between qualifications at different institutions) and other transnational education delivery began, particularly but not exclusively in Asia. By the 2000s Australian institutions were employing increasingly sophisticated methods, including the use of digital technology, articulation programmes, social networks and specially commissioned market intelligence research to attract students from around the world into all education sectors.

14.6.2. Pathway programmes

A unique feature of the international student programme in Australia is the strength of linkages between the four main education sectors (schools, English language [ELICOS], vocational education and higher education). The mechanism involves carefully designed, clear pathways from the schools and English language sectors to the other two sectors, and especially to the higher education sector. The majority of international students undertake study in more than one educational sector. Very high numbers of international students in Australia go through the linked system to higher-level study, in a process that is of mutual benefit to educational institutions. Because of the availability of attractive pathway programmes, international students stay in Australia for longer periods of study to gain different kinds of qualification at different types and levels of institution.

14.6.3. Support for student mobility

Australian HEIs themselves are a significant source of funding for inbound international and outbound Australian students, who are mostly fully funded by the university or through donations or bequests (e.g. from international alumni). In 2013, 33 of Australia's 36 universities offered full or partial scholarships (fee waivers and stipends) to international students and an additional AU$364.4 million for scholarships and stipends aimed at international students, most of which (AU$334.6 million) is designated for international postgraduate research students (Olsen, 2014a).

Australian universities collectively provided AU$26.0 million for outbound student mobility in 2013. 47% of all international study experiences were supported by the universities' own funds, or from a combination of university funds with other funding sources (e.g. AU$568,000 from private funds or foundations in Australia). Australian universities play a dominant role in funding outbound student mobility (Olsen, 2014a).

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14.6.4. Learning, teaching and curriculum

Approaches to teaching and curriculum design have been influenced in several ways by the international activities of Australian universities. The presence of international students in increasing numbers in Australia since 1986 has resulted in modifications to student support services to accommodate the needs of international students. Curricula and teaching methods have also been adjusted accordingly. These also need to meet local accreditation requirements and ensure equivalence in course quality and academic achievement when programmes are delivered outside of Australia.

The impact of international students on the learning of domestic students is an issue of considerable debate in Australia. Despite the strongly held beliefs of some university leaders that the presence of international students in class and on campus internationalises the experience and the learning of domestic students, there is no evidence to support such views (Leask & Carroll, 2011). Alternative approaches to internationalising the academic achievement of all students have emerged. These have focused on incorporation of international and intercultural dimensions into curriculum content as well as on learning objectives, teaching, learning and assessment arrangements, and the support services available for a programme of study. As part of this process, greater emphasis has been given to engaging students with cultural and linguistic diversity and purposefully developing their international and intercultural perspectives as global professionals and citizens (Leask, 2013). Here there is a link with the development of graduate capabilities in all students – capabilities which often include 'international perspectives' and 'communicating across cultures'. In the past two years "global citizenship" has emerged as one such, somewhat contested, outcome of an internationalised curriculum. In part, this can be attributed to that fact that a driving principle behind the global engagement of Australian universities is said to be the development of 'informed, engaged, global citizens' (Universities Australia, 2013). However, while there has been much rhetoric, there has been limited discourse about the university's role and responsibility for translating global citizenship into organisational strategies and pedagogical practices (Lilley, 2014). A national symposium on Global Citizenship, held in September 2014 and involving the Australian Government, Australian HEIs and employer groups provided some momentum on the issue (IEAA, 2014). The symposium highlighted the importance of ensuring that policy makers, university leaders and academic staff work together to define and achieve the objectives of an internationalised curriculum.

The Australian Government has provided funding to support around 15 projects and teaching fellowships in learning and teaching across cultures, internationalisation of the curriculum and global citizenship in the last decade. The results of these projects have been disseminated across the sector in Australia and also internationally. This investment on the part of the government is to some extent attributable to a desire to ensure that Australian universities deliver a stimulating, high quality education to international students whilst preparing Australian students for work in an increasingly connected global community.

Technology provides increasingly accessible opportunities for interactive research-led, problem–based international and intercultural learning opportunities. For the next generation of geographically dispersed international students, attuned to multi-modality, technology offers a broad range of opportunities for intercultural exchange and international learning 'at home'. Australian universities are beginning to act on the potential for globally networked learning and teaching through the use of technology on both a small scale – to complement face-to-face international connections and on a large scale – through MOOCs.

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14.6.5. Global research engagement

Australian universities perform well on multiple measures of research performance. These include R&D expansion based on OECD metrics, university rankings, Excellence in Research for Australia (ERA) rankings, research productivity measured by citation indices and citation impact, and patterns of international research cooperation. Given its population size, this performance is outstanding. However on a global scale, other countries and regions – Asia, South America, India, Africa, Russia and a number of other countries of the former Soviet Union – are rapidly catching up. This is particularly the case for some Asian countries and poses significant challenges for Australian national science, research and innovation policy and for Australian universities.

Maintaining and building Australia's research capabilities, reputation and influence over the long term will depend to some degree on the extent to which bilateral international partnerships result in larger and more developed research consortia/networks. Given Australia's geographic location, it is likely that there will be a focus on strengthening ties with Asian research partners, in areas such as energy, water, climate, pollution, transport, housing, health and education, all of which are topics of particular relevance to the emerging economies in Asia (McMillen, 2012).

14.7. Key performance indicators: student mobility and performance, institutional/programme mobility, and economic returns

14.7.1. International student enrolments

According to the Australian Department of Education data, in 2013 international students represented 25% of all students in Australian HEIs and 30% of all postgraduate research students. With over half a million international student enrolments in 2013, Australia ranked third amongst the English-speaking study destinations, after the US and the UK. However, it ranked first amongst the major host countries in terms of the proportion of international higher degree students. Australia attracts just over 6% of the world's globally mobile students (Institute of International Education, 2013).

Historically, Australia has been an international undergraduate study destination, but Australian HEIs have been increasingly successful in shifting the balance towards a greater proportion of international postgraduate students, and particularly postgraduate research students. In 2012 Australia had a higher proportion of international research students (32%) than the OECD average, a higher proportion than the USA, but a lower proportion than the UK (Olsen, 2014a).

14.7.2. Education as an export

Education is regularly within the top five of Australia's largest exports and is usually classified as third or fourth in terms of importance (Connelly &Olsen, 2013). Australia's total education services exports peaked in 2009/10 at AU$19.1 billion and thereafter declined to AU$14.108 billion in 2012/13 (Australian Bureau of Statistics, 2014). Recent modelling suggests the value of education exports will double, from AU$15.7 billion in the financial year 2014 to AU$30.8 billion in 2020 (Olsen, 2014b). Australian universities have used their international fee income to help offset the persistent decline in Australian Government funding for universities. This income has been especially crucial to Australian university research.

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14.7.3. International student performance

Based on Australian Government data, the academic performance of international undergraduate students is better than that of Australian domestic undergraduate students. The results suggest that, overall, Australian universities are setting entry standards, including English language entry standards for international undergraduates, that lead to academic success. In other words, the universities are enabling international students to achieve proficiency in the English language, are providing appropriate English language and study skills support and are routinely monitoring the academic performance of international students (Olsen, 2014a).

14.7.4. Transnational education

Australia has a very large and successful transnational education presence. There are an estimated 210 Branch Campuses worldwide (Global Higher Education, 2014). Seventeen of these are operated by Australian HEI's located in Canada, China, Kuwait, Malaysia, New Zealand, Singapore, South Africa, the United Arab Emirates, and Vietnam. Three foreign HEIs operate branch campuses in Australia - SP Jain Centre of Management (India), University College London (UK) and Carnegie Mellon University (USA).

In addition to branch campuses, Australian HEIs are involved in a large number and a variety of other forms of transnational delivery, through twinning, articulation and franchise agreements with overseas partners.

Of the 328 402 international students studying in Australian HEIs in 2013, 84 785 were enrolled at campuses outside Australia and a further 25 331 were distance education students (Table 1). Together, these 110 116 transnational students represented 33.5% of all higher education international students (Australian Department of Education, 2014).

Table 7: Higher education delivery to international students

Higher Education delivery to international students					
	Students			% Growth	
Delivery to	2011	2012	2013	2012	2013
International students in Australia	224 914	215 592	218 286	-4.1%	1.2%
Students at offshore campuses	80 458	82 468	84 785	2.5%	2.8%
Distance education students offshore*	27 205	25 552	25 331	-6.1%	-0.9%
Grand Total	332 577	323 612	328 402	-2.7%	1.5%

*includes online learning and correspondence students studying award courses.

The major levels of study were bachelor's degrees (69.3%) and master's degrees based on coursework (19.9%). The major fields of education were Management and Commerce (57.8%), Engineering and Related Technologies (7.9%), Society and Culture (7.4%), Information Technology (7.0%), and Health (6.0%). The top five home countries of transnational students were Singapore, China, Malaysia, Vietnam and Hong Kong (Chart 7). This profile is different compared with the top five home countries of students studying in Australia. These were China, India, Malaysia, Vietnam and Indonesia.

14.7.5. Outgoing mobility of Australian students

Australian students participate in a variety of forms of international study experience including semester to full year programmes, short-term practical training placements, research experience and other short-term programmes. The bulk of this experience is credit earning. The number of students has steadily increased since 2009. 29 487 students at all levels undertook international study in 2013. The number of international study experience opportunities taken by Australian undergraduate students in 2013 was equivalent to 14.8% of domestic undergraduate completions in that year (Olsen, 2014a). The number of students participating is also increasing. The 2013 figure compares with 14.2% for the USA (Open Doors, 2013).

34.8% of outbound Australian students went to Asia, 33.8% to Europe, 21.7% to the Americas, 3.8% to Oceania, 2.6% to Sub-Saharan Africa and 2.0% to the Middle East/North Africa. China was the third most popular destination country, behind the USA and the UK. The Oceania Region, Japan, India and Malaysia are also in the dozen most popular destination countries (Olsen, 2014a).

14.8. Moving beyond the mobility and commercial mindset: possibilities and potential pitfalls

Australia's political leaders believe that the dominant model of internationalisation in education is international student mobility. Moreover, the overriding mindset is commercial. There is little appreciation of the role played by the international mobility in teaching and research talent. This also applies as regards an internationalisation of the curriculum, the globalisation of research endeavour, or the global responsibilities of educational institutions, particularly universities, in helping to solve the challenges facing societies and the global environment. However, not all Australian HEIs share this narrow view.

There is significant agreement amongst Australian higher education leaders that future success will depend on the capacity of Australian institutions to forge creative global and regional alliances and networks based on a new understanding of the shifting architecture of higher education transnationally. Institutions believe public policy should be focused on encouraging and supporting that thrust.

In the past Australian Governments have, as a rule, been reluctant to take a 'hands on' approach to Australian international education. Instead, the tendency has been to provide a supportive framework and enable institutions to act without government interference. The aim is to encourage 'greater dynamism and innovation in the industry' (DEET, 1991). Where intervention has been necessary, the justification given has been in terms of 'protecting national security', 'protecting the reputation of Australian higher education', 'improving quality', 'sustaining education as an export', or 'increasing Australia's international competitiveness'.

The current Australian Government claims to be committed to a 'whole-of-government' approach to the internationalisation of Australian higher education and a bi-partisan acceptance of the recommendations of the International Education Advisory Council report Australia Educating Globally (Chaney Report) released in 2012. Two years after the report was presented, the Government formally responded to the report in April 2015 by accepting all its recommendations.

At the same time the Government released its long awaited Draft National Strategy for International Education (Commonwealth of Australia, 2015). Although this is a consultation draft, it gives a clear signals on future orientation. The draft boldly states: 'Australian international education is a core element of Australia's economic prosperity, social advancement and international standing'. Nevertheless, the three 'pillars'

underpinning the proposed strategy (getting the fundamentals right; reaching out to the world and staying competitive) together with the six associated strategic goals (a world-ranked education system; international partnerships; an international outlook for Australian students; attracting more international students and researchers; improving international student experience; and continued growth in international student numbers) are not unique to Australia and offer no surprises. In fact, the vision and strategy reflect a "steady-as-she-goes" approach and a degree of complacency.

Despite describing itself as a blueprint to securing Australia's place as a world leader in international education, the strategy is not in fact a blueprint. It does not suggest specific action programmes in addition to those that have been in place for some years. There is a dearth of new programme initiatives. This is likely to be a conscious move possibly signaling a lack of commitment to providing additional funding to implement the strategy. It is possible that suggestions for programmes will be made in due course, as a result of the Government's consultations with education and business leaders during two roundtables proposed for 2015.

Finally, while the draft strategy is positive in many respects, it is markedly deficient in others. In particular, it is narrowly framed. It also lacks a comprehensive vision for a higher education sector that should take account the role Australia could play as a medium-sized power in the Asia-Pacific region or the potential role of Australian universities in the regional as well as the global context based on their numerous regional and global links. Moreover, awareness of the need for genuinely equal partnerships with other nations, including the need to understand and address global challenges on a cooperative basis, is absent from the strategy.

The Australian Government's current instrumentalist and, arguably, rather self-absorbed objectives for international education are in sharp contrast to the breadth of the vision of the 1957 inquiry by the Committee on Australian Universities (chaired by Keith Murray), which heralded the beginning of direct government influence on higher education:

> 'The Australian universities have an inescapable responsibility to contribute to the general pool of scholarship and discovery, to throw light on the problems of contemporary society, whether in a local or broader context; further, judged pragmatically, university research… must be the door through which must come in an increasing stream, those men and women of enthusiasm and high capacity of whom the Australian community has need, if it is to exploit fully the potential of its environment, is to ensure the impetus necessary for national development, and render some measure of service to its… neighbours' (Report of the Committee on Australian Universities, 1957).

There is an opportunity for the Australian Government's proposed international education strategy to take a more comprehensive view and to seek to integrate the national innovation, education and training, and science and research agendas and infrastructures within Australia's international engagement strategy. As Australia's Chief Scientist has said, 'an international strategy should incorporate education, as well as science and research. This could enable us to take a prioritised approach for international engagements and fund them accordingly' (Chubb, 2014).

A more comprehensive and genuinely reciprocal international education strategy is needed. The narrow focus is already inadequate and will be increasingly so in the future.

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15.   CANADA

Karen McBride, Jennifer Humphries and Janine Knight-Grofe[43]

15.1.   Introduction

Canada's higher education system is recognised for excellence at home and abroad. From an internationalisation perspective, Canada's principal advantages are its reputation for education quality and for research strength. Its challenges include the low profile of its education system compared to Western European countries and the United States, despite this system being known for quality.

Canada has had an erratic approach to internationalisation over the past 35 years. However, this approach has become more focused in recent years. New policies and strategies have been adopted that are having significant impact. Some areas of internationalisation are more developed than others. For example, to date considerably more focus has been placed on international students inbound than on Canadian students outbound. Recently, government, business and public institutions have shown a greater interest in study abroad.

This paper reviews Canadian higher education and the country's policy on internationalisation. It covers key features and data, and provides indicators on where further information can be obtained.

15.2.   Higher Education in Canada: An overview

15.2.1.   Authority — a decentralised approach with a special role for associations

Education in Canada falls within the jurisdiction of the ten provincial and three territorial governments. In 1967, the Council of Ministers of Education, Canada (CMEC), was set up as a forum to discuss matters of mutual interest among the various ministries, of which there are currently 22, with some provinces having both an education and a higher education ministry. As stated on its website, 'CMEC's mandate internationally is that of coordinating the collective responsibility of the provinces and territories for education where the activities concerned require experts, delegates, or reports that speak for the Canadian educational authorities as a whole.' This includes Canadian participation in OECD and UNESCO research studies (for example, PISA).

While many of the decisions on education are made by the provinces and territories, institutions hold a high degree of autonomy within higher education. Moreover, the federal government plays a significant role in supporting research in a range of areas. As regards international education, the Department of Foreign Affairs, Trade and Development (DFATD) holds primary responsibility at federal level and works closely with CMEC.

The decentralised nature of education in Canada makes the role of national associations extremely important. The Canadian Bureau for International Education (CBIE) focuses exclusively on internationalisation and represents institutions at all levels of study. Individual types of institution are represented by the Association of Universities and Colleges of Canada (AUCC), Colleges and Institutes Canada, the Canadian Association of Public Schools – International, and Languages Canada. The five national associations have formed the Canadian Consortium for International Education (CCIE) so as to cooperate more effectively in the field of internationalisation.

15.2.2. Post-secondary institutions

Canada has 226 public post-secondary institutions and 60 private post-secondary institutions.

Canada's 95 public universities include research-intensive institutions, mid-sized institutions and smaller universities that offer primarily undergraduate education. Universities award Bachelor's, Masters and doctoral degrees.

Canada's public colleges award diplomas and certificates. A number of colleges have recently been given degree-awarding status, and a few have transitioned to university status. A few larger colleges are known as technical institutes or polytechnics, and run applied degree programmes as well as transfer programmes (two years at the college/institute followed by two years at a university).

15.2.3. Participation

Total post-secondary enrolment in the academic year 2011-12 was 1,996,200, comprising 1,466,148 full-time and 530,052 part-time students. Of these, 1,263,750 were at universities and 732,450 were at colleges or other post-secondary institutions (Citizenship and Immigration Canada, 2014).

Over the past several years, concerns have been expressed about a possible decline in undergraduate enrolment as the effect of the baby boom wains. This has not materialised and, instead, the number of full-time undergraduate students in Canada has increased by almost 44% since 2000. This is attributable to a marked rise in both domestic and international enrolment.

The OECD's (2014) Education at a Glance 2014 reports that over 50% of adult Canadians hold a college diploma or university degree – the highest rate among all OECD countries.

15.2.4. Funding

Government sources account for most of the revenue of Canadian public post-secondary institutions, but in 2012 this funding was just slightly above 50% (Financial Information of Universities and Colleges). In Ontario, institutions are now described as publicly assisted rather than publicly funded. Non-government funding sources include tuition fees, and alumni and donor support.

Internationally related activities are financed largely by institutions themselves, with 78% of universities surveyed by the AUCC in 2014 providing funding for study abroad programmes; 67% for faculty travel abroad for conferences; 61% for visiting international faculties; and 59% for faculty research abroad (AUCC, 2014).

15.3. European and other supranational programmes and policies: catalysts for cooperation and innovation

Canada participates in a large number of multilateral organisations, as a full member or observer. Key partnerships in education involve the OECD and UNESCO. Canada is an active member of the Commonwealth and La Francophonie, both of which have major education interests. Canada hosts the only Commonwealth agency located outside the United Kingdom, the Commonwealth of Learning, whose mandate is distance and virtual education.

Canada and the European Union have a longstanding education relationship. For example, the EU-Canada Programme for Co-operation in Higher Education, Training and Youth ran from 2006 to 2013 and supported various EU and Canadian post-secondary institutions in running joint study programmes, including faculty exchange and international internships. ERA-Can+ promotes co-operation between the European Union and Canada in science, technology and innovation.

Canada is a signatory to the Lisbon Recognition Convention. Detailed information on this can be found on the website of ENIC (the European Network of Information Centres in the European Region) and NARIC (National Academic Recognition Information Centres in the European Union) and on the website of CICIC (the Canadian Information Centre for International Credentials). CICIC is a unit of CMEC, established in 1990 after Canada ratified the UNESCO Convention on the Recognition of Studies, Diplomas and Degrees, to assist Canada in carrying out its obligations under the terms of this Convention.

As noted on the ENIC-NARIC website, the Diploma Supplement is not a feature of the higher education systems in Canada, although there is considerable interest in the implications for Canadian institutions.

The European initiatives evolving from the Bologna Process, such as the European Higher Education Area and European Credit Transfer System, are of interest, too. In 2009, the AUCC hosted an important symposium on the Bologna Process which brought together experts from Europe, Australia, the United States, Latin America and Canada. As stated in The Bologna Process and Implications for Canada's Universities: Report of the 2009 AUCC Symposium (AUCC, 2009), European initiatives have been seized on by Canadian higher education leaders and are seen as an opportunity to enhance access, recognition and cooperation. While there is no comprehensive data, the number of joint degree and co-tutelle programmes between Canada and EU countries has increased and greater resources have been put into capturing the information necessary to promote joint activities. The 2014 the AUCC internationalisation survey indicates that 81% of universities now offer at least one kind of collaborative degree programme with international partners (dual, double, joint). This is up from 48% in 2006.

The European 'Tuning' initiative has led to a major project undertaken by the Higher Education Quality Council of Ontario (HEQCO), an arm's-length agency of the Government of Ontario that brings evidence-based research to the continued improvement of post-secondary education in Ontario. The results of the project are documented in the 2014 report Tuning: Identifying and Measuring Sector-Based Learning Outcomes in Postsecondary Education. This provides practical and measurable learning outcomes that can help institutions and faculty members develop results-based programmes.

It is evident that the influence of the Bologna Process and related endeavours on Canadian higher education – institutions and governments – extends well beyond Canada's connections with Europe to cover other countries and includes attempts to enhance learning outcomes and recognition within Canada.

15.4. National policies for internationalisation of education

15.4.1. Canada's international education strategy

Canada's first-ever International Education Strategy (IES) was launched in January 2014. This Canadian strategy is a milestone for the education sector, which had been arguing in favour of a strategy for two decades. It demonstrates a remarkable degree of consensus in a country in which education is a provincial and territorial prerogative and where there is no national education ministry. The federal government, which spearheaded the strategy, holds jurisdiction and responsibilities in international relations, development cooperation, scientific research, workforce development and a host of other realms that intersect the world of international education.

The IES is the federal government's response to a blue-ribbon Advisory Panel appointed in 2011 by the Ministers of Finance and of Trade to examine Canada's position in international education and make recommendations on a strategy. It was framed in an economic context and focused on inbound international students. However, early in the discussions, the Canadian Consortium for International Education (CCIE) persuaded the Panel to adopt a more expansive view and, in particular, to consider outbound mobility for Canadian students. The Panel's report, International Education: A Key Driver of Canada's Future Prosperity, released in August 2012 made 14 recommendations. This covered such issues as targets for inbound mobility and awards to support outbound mobility.

In a paper entitled Canada's International Education Strategy: Harnessing our Knowledge Advantage to Drive Innovation and Prosperity (DFATD, 2014), the IES sets out the following priorities:

- Setting targets to attract international students. The IES aims to double the number of international students in Canada to 450,000 by 2022 and to increase the number of international students choosing to remain in Canada as permanent residents after graduation.
- Focusing on priority education markets. The IES, which is framed as a component of Canada's Global Markets Action Plan, focuses on the countries and regions identified as priorities for Canada under that plan: Brazil, China, India, Mexico, North Africa and the Middle East and Vietnam. At the same time, the IES recognises the need to maintain relationships with established partners such as the United States, France, Germany, the United Kingdom, Australia, Japan and Korea.
- The IES commits the government to updating Canada's brand and marketing material to better promote Canadian education to an international audience.
- Strengthening institutional research partnerships and educational exchanges, and leveraging people-to-people ties. The IES recognises the importance of mobility but does not set a target.
- Supporting activities and leveraging resources to maximise results. Federal departments will work collaboratively and with non-governmental partners.

Although the IES is national in scope, most Canadian provinces and territories have their own strategies which are complementary to federal initiatives.

15.4.2. Mobility—Growing interest in expanding study abroad

As stated earlier, inbound mobility takes precedence over outbound mobility for the federal and, as a rule, provincial governments. However, there are signs that more attention is being paid to education abroad. Employer surveys indicate that employers increasingly value international learning experience.

The CBIE has created an Education Abroad Advisory Committee that is developing a lexicon for education abroad as a first step towards proposed national tracking standards. Lack of reliable pan-Canadian data is a longstanding concern. This lack attributable to the fact that institutions use different terminology and definitions.

Nevertheless, good data will not resolve the fundamental issue of participation. Only 3.1% of Canada's students participate annually in study abroad during their university programmes, and fewer in college and institute programmes (see also the section in this report dealing with key performance indicators). Many Canadians see this as a missed opportunity. While other nations attach considerable importance to study abroad and recognise the strategic importance of internationalising their youth, Canada lags behind and is perpetuating its international skills deficit.

CBIE and partner associations are urging the federal government to take up the Advisory Panel's (2012) proposed target of 50,000 study abroad awards annually by 2022. CBIE calls for 15,000 awards for Canada's 150th anniversary in 2017, ramping up to the 50,000 target.

15.4.3. Scholarships: A half-century tradition

Canada has participated in international scholarship programmes for over 50 years. It partnered the creation of the Commonwealth Scholarship and Fellowship Plan (CSFP) in 1959 and in peak years supported up to 500 scholars from across the Commonwealth to undertake Masters and doctoral studies in Canada. Canadians benefited from the CSFP, too, receiving scholarships to study in several countries, in particular the United Kingdom (Perraton, 2009).

Canada currently offers a substantial number of awards to international students for studies in Canada under an array of different programmes:

- The DFATD provides over 700 scholarships annually to students in Africa, the Americas, Asia and other regions.

- Since 1987 the Programme Canadien de Bourses de la Francophonie has provided 2,160 scholarships for study in Canada.

- Doctoral and post-doctoral awards valued at over $10 million per year, open to international and Canadian students, include the Vanier Canada Graduate Scholarships and Banting Postdoctoral Fellowships.

- Beginning in 2015, the African Leaders of Tomorrow Scholarships Fund of the Government of Canada, in partnership with the Mastercard Foundation, will grant up to 130 scholarships to young Africans to pursue a master's degree in public administration in Canada.

- Beginning in 2015, the Queen Elizabeth II Diamond Jubilee awards will support Canadian students undertaking exchanges in other Commonwealth countries, and Commonwealth citizens undertaking Masters or doctoral studies in Canada.

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- The government has invested $13 million over two years in the Mitacs Globalink Programme to expand its existing internships to include research mobility opportunities for Canadians.

- Three federal granting agencies support research and innovation at post-secondary institutions in Canada, including scholarships and fellowships: Natural Sciences and Engineering Research Council (NSERC), Social Sciences and Humanities Research Council (SSHRC) and Canadian Institutes of Health Research (CIHR).

Many international students come to Canada on scholarship programmes run by their own country (such as Brazil's Cienciasem Fronteiras) or by international organisations.

15.4.4.   Immigration: substantial effects on Canadian international education

The impact of Canada's immigration policy on international education is profound. The government is highly supportive of the retention of international students who graduate from Canadian post-secondary programmes. The IES states that 'International students are a future source of skilled labour, as they may be eligible after graduation for permanent residency through immigration programmes, such as the Canadian Experience Class' (introduced in 2008). International students are well placed to immigrate to Canada as they have typically obtained Canadian credentials, are proficient in at least one official language and often have relevant Canadian work experience. CBIE's 2014 student survey indicated that 50% of international students intend to apply for permanent resident status in Canada, double the percentage reported in 2004.

15.4.5.   Other policies

Several of Canada's provincial governments have international education strategies and policies that make reference to mobility, scholarships, internationalisation at home and internationalisation learning outcomes. As a rule, they support the principle of developing a globally oriented education system, preparing students to play an active part in the global economy, increasing the number of international students and supporting study abroad. The CBIE's A World of Learning: Canada's Performance and Potential in International Education 2014(CBIE, 2014) provides a snapshot of several provincial strategies.

Higher education institutions take the lead in developing their own policies and practices for internationalisation at home, curriculum internationalisation, learning objectives and in the development and implementation of collaborative degree programmes with international partners (see section on institutional policies below).

15.5.   Other key stakeholders: employers and businesses

Employers are key stakeholders in internationalisation. Increasingly, they are interested in the retention of international graduates from Canadian institutions, particularly in regions facing skills shortages such as the Atlantic and Prairie Provinces. In some cities, business groups have developed mentorship programmes to help international graduates prepare for employment.

Businesses are also interested in having more Canadian graduates with international and intercultural competencies, but it is not clear what impact this interest has had on recruitment (see the AUCC media release, Dec. 1, 2014 regarding a survey showing that employers believe young Canadians need to think more globally).

15.6. Institutional policies, priorities, and challenges

15.6.1. Institutional trends and concerns

The Advisory Panel's 2012 report states that 'internationalisation (…) is a highly pressing priority on campuses across the country.' This is certainly the case. The vast majority of Canada's higher education institutions have developed internationalisation strategies. In most cases, these are multifaceted: two-way mobility, quality services, internationalised programmes of study and institutional partnerships abroad.

Results from the AUCC's 2014 survey show that 95% of Canadian universities include internationalisation or global engagement within their strategic planning. 82% of universities identify internationalisation as one of their top five priorities. Moreover, 81% run collaborative academic programmes with international partners. This represents a major increase over the last eight years.

The IAU 2014 internationalisation survey (Egron-Polak & Hudson, 2014) paints a helpful picture of Canadian university focal points in internationalisation. Respondents see the principal benefit of internationalisation as 'increased international awareness of/deeper engagement with global issues by students.' Moreover they are putting considerable energy and resources into mobility programmes for their students. When asked, 'Over the past three years, how has the level of overall funding to support specific internationalisation activities changed at your institution?', 50% of respondents stated that funding for "Outgoing mobility opportunities/Learning experiences for students" has increased. This was higher than any other single item including marketing to recruit fee-paying international students.

Judging by the AUCC (2014) and IAU (Egron-Polak & Hudson, 2014) survey results, preparing global citizens and expanding research capacity take precedence over the economic considerations of internationalisation at Canadian universities. Institutions adhere to a number of Codes of Ethical Practice in International Education, including that laid down by the CBIE (2013). During 2014, senior education leaders participating in a CBIE network developed a set of internationalisation principles to serve as a guide for Canadian educational institutions in an increasingly complex environment. The principles identify internationalisation as a vital means to achieving global-level civic participation, social justice and social responsibility and, ultimately, to serving the common good. In the same year, the Canadian Association of Deans of Education adopted an Accord on the Internationalisation of Education. The Accord promotes economic and social justice and equity; reciprocity as the foundation for engaging in internationalisation activities; global sustainability; intercultural awareness, ethical engagement, understanding and respect; and equity of access to education.

As in other countries, Canada's institutions are buffeted by external forces, such as international ranking schemes. Canada's universities have fared relatively well, but smaller institutions that are consistently ranked lower are beginning to find it harder to attract international partners and students.

15.6.2. Working toward strong international student services

Canadian institutions place considerable emphasis on student services in general. With regard to international students, orientation programmes are being redesigned at many institutions to ensure smoother transition. Research published in the CBIE's A World of Learning 2014 (CBIE, 2014) indicates that institutions need to focus on designing

programmes that support the following: connectedness to the various groups on campus; a sense of belonging to the culture of academia; helping students develop resourcefulness; and enabling students to gain a sense of capability. Increasingly, institutions are seeking to achieve these objectives through programmes that more effectively enable international students to interact with faculty members and domestic students.

15.6.3. Selective engagement with virtual mobility

Another challenge is the advent of MOOCs and other new modes of education delivery. Many institutions have successfully entered the age of MOOCs, and generally do so on a selective basis.

Canadian institutions have considerable expertise in distance education which has been developed to serve students in the many remote parts of Canada. Numerous universities and colleges offer a range of distance programmes. Institutions specialising in distance education include Athabasca University and Télé-université of the Université du Québec. The Canadian Virtual University is a consortium of 12 institutions that run distance programmes. Of the institutions responding to the IAU survey (Egron-Polak & Hudson, 2014), over 90% offer distance, online and/or e-learning courses/degree programmes that are also available to students in other countries.

15.6.4. Making more of internationalisation at home

Canadian institutions increasingly understand that, as not all students can be internationally mobile, internationalisation at home is important. The AUCC's 2014 survey shows that 72% of universities run activities that are designed to internationalise the curriculum. This figure represents a 41% increase compared with 2006 (AUCC, 2014). The IAU survey (Egron-Polak & Hudson, 2014) shows that 80% of universities have programmes/courses that include an international theme (for example: International Relations, Development Studies, Global Health) and 77% of universities run activities designed to develop the international outlook of students. These activities comprise online curriculum cooperation, international projects and internships at home, and internationally focused research.

15.6.5. Tracking international learning outcomes

Canadian institutions are keen to nurture globally aware students. Canadian and international research has demonstrated that intentionality is critical in achieving global awareness through mobility programmes. Accordingly, internationalisation leaders and faculty are placing increased emphasis on clearly identifying learning objectives for study abroad, ensuring that students understand and engage fully with them, and in identifying indicators to measure success in attaining objectives. In curriculum internationalisation, institutions are attaching importance to content and a form of pedagogy that broadens understanding and enables students to become familiar with diversity.

Institutions are concerned about outcomes in general: 59% of Canadian universities monitor internationalisation implementation as part of their quality assessment processes (AUCC, 2014).

15.6.6. A commitment to research collaboration

The AUCC 2014 survey found that over 50% of universities include international research cooperation within their institutional strategy. Canada achieves double the world average of international co-authorship – 43% of Canadian papers are co-authored with one or more international collaborators (Council of Canadian Academies, 2012).

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15.7. Key performance indicators: mobility and more

15.7.1. International students in Canada

While there is a substantial amount of data available on international students in Canada, as a rule educational institutions consider that the country's internationalisation data collection and analysis capability is inadequate. This is, in part, because Statistics Canada data, which is highly accurate and detailed, is issued two to three years after the academic year covered – which is too late to be useful in making projections and decisions. Citizenship and Immigration Canada data is useful and timely, but does not cover study programmes and lacks the detail that Statistics Canada records. Institutions and organisations continue to press for greater investment in this area.

Despite these limitations, the CBIE has carried out considerable analysis using data sets custom-ordered from both government departments. On this basis, it is able to offer a reasonable picture of Canada's international student population.

In 2013, there were 293,505 international students in Canada. This represents an 84% increase over the last decade and an 11% increase over the previous year.[44][45]

International students from 194 different countries were studying in Canada in 2013. Students from East Asia make up almost half (48%) of the international student population in Canada.[46] The vast majority of students from this region (~70%) are from China – the primary country of origin of all international students in Canada (32%).

International students at post-secondary level in Canada, including university, college, trade and other post-secondary students comprise 81% of international students in the country (2013). University-level international students comprise the largest group, at 160,735 students or 55% of the total (CIC, 2014).

In 2010, international students accounted for 8% of full-time undergraduate enrolment, 18% of full-time Masters enrolment and 23% of full-time doctoral enrolment at Canadian universities (OECD, 2014).

Students from the EU's 28 member states comprise 8% of all international students in Canada, numbering approximately 24,000 in 2013. As depicted in figure 1, over half (55%) of these students are from France, with all other countries far behind. This is, in part, due to the longstanding agreement between France and Québec which currently allows French students to pay local tuition fees in the province, rather than the much higher international student fees.

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[44]   Source: Citizenship and Immigration Canada data. International student numbers are based on valid study permits. Students enrolled at a Canadian educational establishment for less than six months are not required to hold a study permit, and are therefore not counted. This includes many language school and exchange students.

[45]   The 2013 data provided by CIC is preliminary and may be adjusted slightly in future data sets.

[46]   Regions were designated using primarily World Bank classifications, but with two notable exceptions - the authors disaggregated East Asia and Oceania and South Pacific.

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Table 8: International students in Canada, European Union Member States, 2013

Source Country	Number of Students
France	13,090
United Kingdom	2,775
Germany	2,605
Spain	1,120
Italy	845
Belgium	455
Sweden	335
The Netherlands	325
Republic of Ireland	320
Poland	260
Greece	240
Austria	210
Portugal	170
Romania	170
Czech Republic	160
Finland	160
Denmark	140
Hungary	125
Slovak Republic	100
Cyprus	60
Bulgaria	55
Croatia	55
Latvia	55
Luxembourg	45
Lithuania	25
Slovenia	25
Estonia	15
Malta	10
Grand Total	23,950

Source: Citizenship and Immigration Canada

As regards the economic impact of international students, a recent report prepared for DFATD estimated that international students in Canada spent over $7.7 billion on tuition fees and living costs in 2010. This supported the employment of 81,000 people (Roslyn Kunin and Associates, Inc., 2012).

15.7.2. Canadians studying abroad

The AUCC reports that 97% of universities offer 'the opportunity to do academic coursework abroad'. Expanding outbound student mobility is one of the top 5 priorities of 74% of institutions. However, only 3.1% of Canadian undergraduate university students annually benefit from a for-credit or not-for-credit education abroad experience (AUCC, 2014). According to a 2010 report from Colleges and Institutes Canada (formerly the ACCC), just over 1% of college students undertake study abroad during their study programmes. The top five destinations for Canadians doing full degree programmes abroad are the United States, the United Kingdom, Australia, France and Ireland (CBIE, 2012).

A limited number of scholarships are available to Canadians undertaking degree programmes abroad. They include international scholarships such as Erasmus Mundus, Rhodes and Commonwealth Scholarships.

15.7.3. Language(s) of instruction

The majority of post-secondary institutions use English as the language of instruction, with a large minority using French, and a number using both English and French. Most institutions offer second-language programmes – English as a Second Language or Français langue seconde. This is highly popular with international students. Many institutions teach foreign languages, but there are only a few programmes that require study of a foreign language.

15.7.4. Partnerships

Canadian institutions are involved in a very large number of international partnerships and joint initiatives. As noted above, 81% of Canadian universities run joint academic programmes with international partners, a major increase over the last eight years.

In 1998, the European Commission initiated a programme to establish EU Centres of Excellence in Canadian universities. There are currently five centres across Canada.

15.7.5. Transnational operations

The degree to which international institutions have been able to successfully partake in academic life in Canada is extremely limited. With regard to Canadian institutional involvement, the 2014 IAU internationalisation survey (Egron-Polak & Hudson, 2014) found that 40% of institutions surveyed had not undertaken any offshore activities (academic courses/programmes abroad, branch campuses, overseas joint ventures, franchises) in the past three years. However, over 80% have in place a degree or certificate programme with an international partner (AUCC, 2014).

15.7.6. Capacity-building in developing countries

Canadian government investments in capacity building in developing countries focus on three priority themes – increasing food security, securing the future for children and youth and stimulating sustainable economic growth. Education plays a role in all of these areas and Canada's institutions have a long history of active participation. A number of major government programmes supporting university and college participation in projects with

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developing countries have come to an end, which makes institutional participation in development more difficult. Nevertheless, many institutions continue to identify sources of support. These include Canada's International Development Research Centre and international agencies.

15.8. The future of internationalisation in Canada: encouraging alignment of key stakeholders and interests

In recent years, Canada's federal and provincial governments have become highly interested in internationalisation of education at all levels. Their interest is often based on economic considerations. The first is the short-term economic impact of international students on local communities and institutions. The second is the longer term impact of international graduates in respect of those students who return to their home countries (trade), and those who remain in Canada (workforce development). Even so, governments are interested in developing internationally-minded citizens who can contribute to the world community and in international collaboration that seeks to expand knowledge. Canada's Governor General has promoted the concept of 'the diplomacy of knowledge', which resonates deeply with Canadians across many sectors. It seems that governments will continue to take an interest in internationalisation and to increase investment in mobility in both directions.

Internationalisation is a central pillar in the quest for excellence of Canadian educational institutions. Efforts to expand and promote internationalisation are vigorously pursued. There is no sign that this trend will weaken in the foreseeable future.

In the private sector, leaders are supportive of the retention of international graduates of Canadian post-secondary institutions. Association executives have recently spoken out about the need for Canadian students to gain international experience. While internationalisation is not yet well known across the business community, there is, however, increasing interest in the issue.

In 2009 the CBIE undertook a public opinion poll on study abroad by Canadian students. 90% of the individuals surveyed – across all provinces and age groups – considered that students should have this opportunity. As a rule, Canadians are broadly supportive of international students and of Canada's involvement in international development cooperation and diplomacy.

The national education associations are committed to working together to advocate a more robust approach by all sectors and communities on internationalisation. In this, they follow developments globally and contribute to and identify best practice.

Canada has recently achieved a degree of consensus on the importance of internationalisation and on the key elements of a strategy. While competitive issues within the country continue to challenge this consensus, there seems to be a will and impetus towards continued collaboration in the interests of the national – and international – common good.

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16.   COLOMBIA

Kelly Marcela Henao and Jeannette Victoria Velez[47]

16.1. Introduction

The Colombian system of higher education is a diverse landscape, with very distinct regional backgrounds and a wide variation in the focus and reach of its institutions. The majority of institutions are privately funded and the expectation of equity of access to Higher Education mirrors that of the country on a broader socio-economic level. Significant variations exist in terms of the educational/research goals of individual establishments. All of these factors contribute to a heterogeneous, disparate scenario in terms of internationalisation of the higher education system, and this is further accentuated by the relatively minor role played by the Colombian Government. This has led to a degree of internationalisation that is largely dependent on the differing capacities and goals of individual higher education institutions (HEIs).

Major developments in the Colombian political and economic context over the past fourteen years, and the impact these have had on the perception of the country abroad, have created new opportunities for the internationalisation of Colombian Higher Education. This has led to somewhat ad hoc attempts by the government to include Colombian Higher Education in its diplomatic strategy to open up the country and diversify trading partners. It has also generated specific measures linking quality with internationalisation, an example of which has been the inclusion of internationalisation indicators in the National Accreditation policy. In addition, HEIs have reacted differently to these new opportunities and challenges, from passively and progressively incorporating requirements vis-à-vis national accreditation to expanding already elaborate cooperation mechanisms and initiatives with international partners.

All these aspects are reviewed in this report taking into account various sources, including, above all, the Study of the Internationalisation of Higher Education in Colombia and the Modernisation of Internationalisation Indicators in the National System of Higher Education (Ministry of Education & CCYK, 2014), a recent survey led by the Colombia Challenge Your Knowledge Network.

The conclusion in this report sets out a number of opportunities, challenges and recommendations. Whilst Colombia has no specific policy or strategy on the internationalisation of higher education, recent State and HEI-backed initiatives have given internationalisation strategies increased relevance and a broader reach. They may provide the momentum to achieving a more comprehensive approach in the design and implementation of such strategies.

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[47]   The authors wish to thank Carlos Coronado, Director of the International Office at Universidad del Magdalena, Colombia, for his contribution to this report.

16.2. The higher education system in Colombia: multiple players and a heavy reliance on private higher education

Higher education and tertiary education are terms used indistinctively in Colombia to refer to all types of institutions delivering post-secondary degrees. The basic structure of Colombian Higher Education is comprises four levels of institutions. There are 288 institutions in all, which are classified according to degree level awarded and institutional mission. According to the National Information System of Higher Education, in July 2014 there were in Colombia: 81 universities; 121 university institutions/technological schools; 51 technological institutions and 35 professional technical institutions.

According to the National Information System of Higher Education (SNIES) (n.d.) universities represent 28% (n.d.) of these institutions. They form part of the group of institutions offering undergraduate and graduate degrees (including masters and doctorates) and undertaking scientific and technological research. University Institutions/Technological Schools, representing 42% of the total, run undergraduate programmes and certain "specialisation" programmes, which are graduate degrees that are nationally recognised and the objective of which is to enable a deeper understanding of a given academic discipline. Technological Institutions and Professional Technical Institutions, a 17% and 12% overall share respectively run programmes with a technological and technical content. They differ in terms of the scientific content, duration, the opportunity to continue to a higher level and professional approach.

In addition, two other institutions play a key role in delivering higher education in Columbia. First, the SENA (National Learning Service), which offers a wide range of free training courses. These aim to promote the social and technological development of Colombia, and the focus is on vocational training. SENA courses comprise, for instance, executive education, traineeships and virtual short courses. 4% of these are regarded as technical and technological programmes, with a relevant impact on the total Higher Education coverage rate which, in July 2014, was 45.5% (SNIES, n.d.). The remaining courses are run by the Regional Centres of Higher Education, CERES, created in 2003. These courses are designed to increase educational opportunities in uncovered regions, and help decentralise higher education, which traditionally has only been available in cities. The CERES develop inter-institutional partnerships with HEIs so as to run courses based on the local training needs of the communities that they serve.

The Colombian Constitution states that education is a public service which can be provided by public or private institutions. Thus, the national system depends on a combination of public and private non-profit funding institutions, a common characteristic of societies with growing populations of young people able to follow tertiary education. Of the 81 universities, 60% are private non-profit institutions and 40% are public. Of the HEIs in the country, 70% are private, 20% public and 10% have mixed funding sources. In terms of enrolment by institutional type, of a total 2,109,224 students in higher education, 52.4% are publicly and 47.6% are privately funded (SNIES, n.d.).

The internationalisation of higher education in Colombia needs to be carefully observed in view of the nature and mission of each type of institution.

16.3. European-Colombian co-operation: positive impacts on partnership development and capacity-building

There has been significant academic cooperation between Colombia and European Union countries, with substantial participation by France, Spain, Germany, Italy and the United Kingdom in activities such as faculty and student mobility, development of double degrees, and research networks.

Of the 240 double degree programmes reported in 2014, 158 were developed with educational institutions in EU countries. French, Spanish and Italian HEIs are the most important partners (SNIES, 2014).

Although the main destinations for outbound Colombian students' mobility are the United States (2238), Mexico (1839), and Argentina (1606), the 3,466 Colombian students received by European Union countries mean that the Europe Union holds a prominent position in the overall ranking. Spain, France, Germany, Italy, and the United Kingdom are the preferred destinations. Australia, Canada and China are better placed than other European countries such as Switzerland, the Netherlands, Belgium, Sweden and Portugal.

Between 2009 and 2012, Colombian Institutions received 515 students from the EU, mainly from Germany, France, the United Kingdom and Spain. China, Australia, and Canada send more students to Colombia than the United Kingdom, Italy, the Netherlands and Belgium.

Three EU countries figure amongst the top ten countries for incoming faculty mobility: Spain, France and the United Kingdom. In terms of outbound mobility, Spain and France are among the top ten destinations. The United States and other Latin American countries are the preferred partners for faculty co-operation in Colombia.

Although it is difficult to measure the impact of EU co-operation programmes in increasing institutional capacity in Latin America and worldwide, the authors believe that these programmes have had an impact on the development of internationalisation partnerships in Colombia. For instance, amongst the 52 projects approved in the three calls for proposals in the Alfa Programme, 32 Colombian HEIs were involved, three of which were co-coordinators (European Commission, 2012). According to figures on Erasmus Mundus published in 2014, 42 institutions have participated or are participating in credit mobility projects, with a substantial increase of over 100% compared to previous years.

In terms of scientific co-operation with the EU, it is important to note that at a national level, Colciencias has been recognised as the focal point of the Seventh Framework Programme, now known as Horizon 2020. Colciencias works as an appointed representative to promote co-operation with European HEIs. In addition, five Colombian institutions have participated so far as full partners in the Seventh Framework Programme.

Bilateral co-operation with European countries also plays a role in the development of research and innovation capacity. Colfuturo, the Colombian initiative offering scholarship-loans for masters degrees and doctorate training, has developed agreements with agencies such as the DAAD, the British Council, the French government and the European Commission to offer better opportunities to talented students in Colombia.

Interestingly, Colombian HEIs have made funds available to co-finance international projects in which its researchers take part - as required in initiatives such as Horizon 2020 (SNIES, 2014). This is an important step for Colombian HEIs in promoting understanding of

co-operative schemes, creating mutually beneficial and long-term relationships, and shaping the "aid receptor" approach.

It will, in future, be important to carry out a review once projects are closed down, follow the development of the Erasmus+ and Horizon 2020 initiatives, and measure the impact of HEI internationalisation strategies on EU-Colombian co-operation.

16.4. National policies for internationalisation: incipient and relatively marginal, but developing

In 2010 the IAU's third global survey stated that, compared to the rest of the world, Latin America and the Caribbean was the region with the least support from government and public policy for the promotion of internationalisation (Egron-Polak & Hudson, 2010). Colombia presents no exception to these findings. Public policy developments in this field are incipient and relatively marginal, whereas higher education institutions (mainly universities) continue to be the main driving forces behind internationalisation.

A detailed review of Colombia's National Development Plans and National Education Plans since 1984 reveals no references to the need for a policy or programme for the internationalisation of higher education and only a few indirect, general statements about internationalisation. The most direct reference to the issue appears in the text of the law regulating higher education in Colombia (Law 30 December 28, 1992). The texts states that the higher education should be seek to promote interaction and mobility by encouraging co-operation between educational institutions and the international community.

It was not until the Declaration of the Regional Conference on Higher Education (CRES), held in Cartagena in 2008, that the Ministry of Education established the inter-institutional committee for the internationalisation of higher education. The documents that were drafted in this conference cannot be considered as the equivalent of a national policy for internationalisation. They represented, nonetheless, an unprecedented guideline for the Ministry's future international initiatives and emphasised the need to make Colombian higher education more visible abroad.

In the absence of a national policy or strategy on internationalisation, Colombian HEIs have developed remarkable co-operation schemes within a highly competitive higher education environment. A milestone was the establishment of a network of public and private HEIs under the umbrella of the Association of Colombian Universities (ASCUN), known as the Colombian Network of Internationalisation (RCI). This network conducted the first evaluation of internationalisation within the Colombian higher education system in 2007. In 2009 a new network of accredited universities (Colombian Challenge your Knowledge, CCYK) adopted a key role in promoting the visibility of Colombian higher education abroad and in leading the policy dialogue with the national government. This leadership position has generated support from government institutions, such as ICETEX, Proexport, the Ministry of Education and the Ministry of Foreign Affairs for the various internationalisation initiatives developed by the network.

The work of these networks has arguably had an impact on the government's policy on internationalisation. The issue of internationalisation has grown in importance and influenced the development of government-sponsored co-operation programmes in higher education (such as Alianza Pacifico). Positive developments in international trade, citizen security and country perception abroad have also contributed to changing the domestic and foreign agendas of consecutive governments. More emphasis has been given to issues such

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as poverty reduction and capacity building at all levels, which has helped address the question of access to and quality of education. In fact, in 2012 the Colombian government requested an external evaluation and recommendations from the World Bank and the OECD on public policy for higher education in the country, with a specific chapter on internationalisation (OECD & World Bank, 2012).

Public policy developments on the internationalisation of higher education have recently acquired a broader reach. The National Development Plan 2010-2014, in one of its core strategies, aims at achieving good governance through innovation, environmental sustainability and international relevance (National Development Department, 2011). The Ministry of Education allocated 3% of its total budget to a four-year investment in programmes developed under its action plan for education, innovation and relevance. More importantly, the National Education Policy included internationalisation as one of its ten overarching strategies, and recognised the need to align the system of higher education with regional and international trends. The Ministry of Education translated this strategy into such measures as:

- capacity building in the internationalisation of HEIs through a coaching programme that pairs experienced universities with less experienced HEIs. The objective is to transmit best practice and implement strategic projects. In the first phase of the programme, 40 HEIs were coached and in the second, the universities of the CCYK network advised another 130 institutions.

- the promotion of Colombia as a destination for quality higher education in the Latin-American region; a country specialised in the teaching of Spanish as a Foreign Language and a hub for regional integration. In this respect, the Latin American and Caribbean Higher Education Conference – LACHEC – has been held annually in Colombia since 2009.

- increasing the visibility of Colombian education, through academic missions of the Academic Mission for the Promotion of Higher Education (MAPES) to different countries in Latin America, Turkey, China and others.

- establishing conditions for the internationalisation of higher education, such as the negotiation of agreements to facilitate the recognition of qualifications for foreigners in Colombia and Colombians abroad; and seeking technical and/or financial international cooperation to improve quality and coverage policies in higher education. For example, the Ministry of Education, in cooperation with the universities, obtained support from international cooperation agencies such as the DAAD or NUFFIC (NUFFIC, 2013).

These schemes, and the inclusion of an internationalisation strategy in the National Education Plan, could mark the emergence of a new policy and government involvement that is undoubtedly novel but still short on ambition and delivery. It is worth noting that, apart from the international cooperation projects for capacity building in education, the initiatives are narrow in scope and focus on formal, modest and short-term objectives.

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16.5. Other key stakeholders and funding schemes for internationalisation: a focus on accreditation and quality, mobility, and research

Other institutions and organisations play a significant role in the internationalisation process of the Colombian higher education system. The National Accreditation Council – CNA - is the public body responsible for assessing the quality of academic programmes and institutions. Since 2013, it has provided specific indicators and evaluation criteria for internationalisation performance at the academic programme level and overall institutional level of the HEIs (CNA, 2013a). This was an important step as it made placed a focus on internationalisation in accreditation policy. This has undoubtedly had a bearing on the way that Colombian HEIs address the issue.

The CNA is recognised as a national agency that has a strong international dimension. For instance, it obtained the certification from INQAAHE (International Network of Quality Assurance Agencies in Higher Education) and RIACES (Ibero-American Network for Quality Assurance in Higher Education) in 2013, and signed the Multilateral Agreement on the Mutual Recognition of Accreditation Results Regarding Joint Programmes, after an external review by the European Consortium for Accreditation – ECA (CNA, 2013b).

Another important public institution is the Colombian Institute of Educational Credit and Study Abroad – ICETEX. Since its foundation in 1953, it has supported student access to higher education in Colombia and abroad through long-standing credit and scholarship programmes that comprise an important range of initiatives focussing on the inbound mobility of foreign scholars, trainers, language assistants and students. Although this Institution has a significant role in promoting international education opportunities for Colombians, its nature and mission have a limited impact in terms of public policy development on internationalisation (SNIES, 2014).

The institutions that constitute the Science, Technology and Innovation System of Colombia are the National Council of Social and Public Policy (CONPES), the Administrative Department of Science, Technology and Innovation (COLCIENCIAS) and the National Learning Service (SENA)[48]. Each of these institutions have worked on policy documents that include a significant international component. These documents share common ground in issues such as the expansion of international opportunities for the training of highly qualified and specialised human resources, the creation of schemes for quality certification in line with international standards. the strengthening of international research networks and the strengthening of national doctoral programmes through international cooperation.

A recent and major change in legislation related to the allocation of revenues has created new funding opportunities and challenges for research. In the new regulations, 10% of oil and mining revenues are to be redistributed to regions which, in turn, should use them to fund science, technology and innovation projects. The challenges here are related to management and transparency concerns and the lack of capacity in many regions to allocate these resources to science and innovation. Nonetheless, the regions with strong higher education and public administration capacities will take on these new opportunities and also, as they are currently doing, involve international partners in multiple, well-funded research and innovation projects.

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[48]   Agreement 16 of 2005.

16.6. Policies at institutional level: Variations across institutional type in planning, implementation, resources, and focus

The Study on the Internationalisation of Higher Education in Colombia and Modernisation of Internationalisation Indicators in the National System of Higher Education (SNIES), a joint initiative of the Ministry of Education and the Colombia Challenge Your Knowledge (CCYK) network, provides the most recent overview of Colombia's performance in internationalisation for the 2009 to 2013 period (Ministry of Education & CCYK, 2014).

An initial finding, indicating progress in relation to the previous study (2007), is that out of the 196 HEIs that participated in the survey (of a total of 288 Colombian HEIs), 70 % responded that they had an internationalisation policy, and 30 % that they did not, but were in the process of developing one. This particular outcome may be directly related to the coaching programme funded by the Ministry of Education and mentioned previously in this report.

Universities rank first among HEIs claiming to have an internationalisation policy (78.8 %), followed by university institutions/technological schools (70.3 %), professional technical institutions (58.8 %) and technological institutions (56 %). A greater percentage of public institutions have internationalisation policies than private institutions.

The primary reason for developing an internationalisation process is to improve the academic quality of the programmes offered, followed by the development of intercultural competence in students. The reasons less prioritised by HEIs were economic competition and increased financial income as well as the promotion of solidarity linkages and co-operation for peace and development. The rationales are similar across the different types of institutions.

Internationalisation policy is mainly proposed and driven by the academic, research and extension units in the case of universities. External stakeholders such as consultancies, businesses/industry and advisory groups have less involvement in this process. This is in marked contrast to the situation in university institutions/technological schools. In this case, policy is largely influenced by the external stakeholders and less by the academic, research and extension units (and the same is true of professional technical institutions).

In terms of implementation, 47 % of all HEIs judged their internationalisation policy to be at implementation stage. 26 % of HEIs responded that they were designing and formulating the implementation plan. While most HEIs reported that they had internationalisation action plans, in the case of technological institutions, roughly one fifth revealed that they had no plans for implementation. Universities and university institutions/technological schools with no internationalisation plan did not exceed 10% of the total.

HEIs primarily use their governing bodies to manage their internationalisation strategy (124 Institutions) and which, in most cases, report directly to the Vice-Chancellor/Rector. 28 institutions reported that the Vice-Chancellor/Rector was the person directly responsible for internationalisation policy. Only eight institutions reported that academic units were charged with the management of their internationalisation strategy.

Institutions with at least one person in charge of internationalisation rank the priorities of their internationalisation policy as follows: international mobility (77 %), international cooperation (57 %), internationalisation of the curriculum (38 %), other areas (28 %), and

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management of financial support (grants) for research (20 %). Scarcity of human resources for internationalisation activities were reported in 28 % of institutions; all of these had only one person in charge of international affairs. Other areas, such as the management of bilateral agreements, bilingualism strategy, marketing, communications and international events were also reported to have a lower priority.

52 % of the respondent HEIs reported the absence of a strategy for curriculum internationalisation. HEIs who replied in the affirmative also reported that the most frequent activities were related to the internationalisation of curriculum content, an international and comparative approach to learning and curricula aimed at the acquisition of internationally recognised professional qualifications. The lowest response rate was for the content of the curriculum specifically designed for international students.

The establishment of universities and university institutions/technological schools as teaching institutions with research duties generates incentives for enhancing the internationalisation of research. In addition, internal research policies in universities reward publication in international journals with salary bonuses and/or rises in basic salary, driving this indicator upwards in relation to other types of HEIs. In the case of university institutions/technological schools, the most common internationalisation activity related to research is attracting young, international researchers.

16.7. Key performance indicators: mobility, internationalisation at home, and internationalisation of research

16.7.1. Student mobility

In 2013, outbound mobility was 0.73 % and incoming mobility 0.24 %, based on a total of 1 346 191 students. This data only refers to short-term mobility (up to 6 months) that can be expressed in different ways, such as exchange programmes, study abroad, internships etc.

Universities receive 1.5 times more international students than university institutions/technological schools. Compared to universities and university institutions, the technological and technical institutions do not receive a significant number of inbound students.

Public HEIs receive more international students than private HEIs. Private HEIs send more students abroad than their public counterparts. There is an apparent imbalance between the outbound and inbound mobility rates: 22 316 against 14 755, respectively, in the 2009-2013 period. Nonetheless, this is only true for universities and technical institutions, because university institutions/technological schools and technological institutions receive more international students than the numbers they send abroad.

The country's top destinations for outbound students were the United States, Mexico, Argentina and Spain, the latter receiving 1 287 in total. Inbound foreign students were received in Colombia primarily from Mexico, followed by Germany, France, the United States and Spain.

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16.7.2.   Faculty mobility

Colombia received 2 290 faculty teachers and sent 5 800 abroad. Universities received and sent the largest number of teachers in the period 2009-2013. Public institutions received 1.6 times more faculty staff than private HEIs. Incoming faculty teachers came principally from the United States, followed by Spain, Argentina and Mexico. The United States was the most popular destination for Colombian faculty teachers (1 997), followed by Spain (1 968), and Argentina (1 327).

16.7.3.   Internationalisation at home

As described above, 52 % of all HEIs reported that they had no policy for curriculum internationalisation, whilst the remaining 49 % did.

The institutions teach English mainly through their languages centres and virtual teaching platforms. Only 17.2 % cited proven foreign language proficiency as a graduation requirement for undergraduate programmes. At post-graduate level, a test of English is an admission requirement at 63.9 % HEIs and 23 % of HEIs stipulate English language proficiency as a requisite for degree completion. Other languages, such as French and Portuguese, are optional.

75.6 % of institutions offered courses taught in foreign languages, of which 75.5 % were private institutions. No data was collected regarding the subject areas or disciplines, nor whether these courses are optional or mandatory.

Approximately 240 double degree[49] programmes have been offered in the last five years. European institutions are the main partners, with France in the lead with 80, followed by Spain (36), Italy (25), Germany (16) and others including Holland, Switzerland and Scotland. The most frequent challenges facing these programmes are financial, or relate to constraints on student mobility and recognition of curricular content.

Regarding the international accreditation of academic programmes, only 50 out of 10 293 (SENA included) have received international accreditation from different organisations, including the Accreditation Board for Engineering and Technology (ABET) and the Accreditation Council for Business Schools and Programmes (ACBSP), amongst others.

The use of ICT in strategic plans for internationalisation is not sufficiently clear in the responses. 32 % of HEIs mentioned that they develop online courses, distance learning or in-person opportunities as continuing education. Only 15 % of 155 offer their own MOOCs , 6 % in partnership with institutions abroad. The use of ICTs and MOOCs was a clear challenge identified by a significant number of institutions.

16.7.4.   Internationalisation of research

- According to the survey there are currently 2 767 foreign researchers (in 161 HEIs) in the research groups.

- Of the 11 105 research projects currently being conducted, only 914 are being developed with international cooperation.

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[49]   The answers were technically limited to a maximum number of 20 double degrees per institution. Only 55 of the 191 institutions exceeded this limit: 43 universities, 9 university institutions, and 3 technical and technological institutions. This means that in reality there could be over 240 double degrees.

- Of the 81 universities authorised to offer doctoral studies, 50 are currently delivering doctoral programmes

- 166 programmes are being conducted in co-supervised doctoral theses with international partners.

- Regarding participation in networks, consortia and international scientific associations, registered participation exists in 1 027 networks, 318 scientific associations, and 138 consortia.

Although research capacity remains weak, there is consensus on its importance amongst all the stakeholders, including Colciencias, the universities, and industry, as demonstrated for example in the important increase in investment and the recognition of groups of excellence. This seems to be an opportunity for European institutions to take advantage of the new Horizon 2020 programme and co-funding collaboration schemes with Colombian institutions.

16.8. Conclusion. An opportune moment for a more comprehensive national approach

In this paper we have analysed the context in which internationalisation has evolved in Colombian higher education, describing its principal features, the forces driving its development, the stakeholders, and the dimensions thereof. Although other issues still require consideration, this review provides a general overview of the current state of affairs regarding internationalisation in tertiary education in Colombia, and identifies the challenges it faces and the opportunities it offers.

In conclusion, we can confirm that Colombia has no specific policy or strategy for the internationalisation of higher education. Recent State and HEI-funded initiatives have enhanced the relevance of and given broader reach to internationalisation strategies, but internationalisation policy still falls short on ambition and delivery. This is highlighted by the fact that many different internationalisation initiatives have been implemented, but with no common overview, objectives or coordination between different stakeholders, such as the Ministry of Education, HEIs, SENA, Colciencias, ICETEX, CNA, etc. The number of initiatives and the enthusiasm with which they have been promoted suggests that now is the time to formulate a comprehensive policy with more proficient procedures for implementation. Such an approach will serve to avoid ad hoc, short-term actions andto enhance the quality of the process.

The diversity of HEIs in Colombia has been explained. The nature and mission of each type of institution appears to determine the way in which they develop internationalisation policy, implement strategies, and shape decisions in respect of the international activities they undertake, for example, the internationalisation of teaching and research. Capacity-building programmes for internationalisation, accreditation processes and funding support schemes all need to consider these differences in order to avoid running the risk of ignoring or overlooking the true purpose of the institution.

In the absence of a national policy or strategy on internationalisation, it has been said that Colombian HEIs have developed remarkable schemes for co-operation within a highly competitive higher education environment. This achievement has been recognised at national and international level. Nevertheless, current initiatives to make Colombia more attractive as a destination of higher education studies have lacked ambition and a realistic approach. Initiatives such as the LACHEC conference need to consider the reciprocity of co-

operation with other countries, not only to attract students, but also to collaborate in teaching and research. If Colombia manages to build on what has been achieved so far, it could lead to a process of integration of higher education at Latin American and Caribbean level.

HEIs continue to be the main driving force of internationalisation in Colombia. The fact that 70 % of institutions reported having an internationalisation policy in place, and a similar percentage reported being at the implementation stage shows significant progress in comparison with the level of internationalisation reported in 2007. However, it will be important to evaluate the impact of these strategies, as current key performance indicators reflect low levels of co-operation mechanisms, and of incoming and outbound student mobility flows, etc. Policies at HEI level need to reinforce the overall structure of support for international relations within the tertiary education sector by training faculty staff in the coordination and development of internationalisation policy and by increasing the human resources devoted to international activities. Internationalisation is becoming a more complex process, requiring ongoing training and the acquisition of new professional skills.

European countries continue to partner HEIs in Colombia. Spain, France, Germany, Italy and the UK are the most well-established partners for student and faculty mobility. Outside Europe, the United States has traditionally been the most popular destination for Colombian students, but it is important to consider the emergence of new countries as partners for Colombian HEIs, including China, Canada and Australia, which have higher student numbers than the other, non-traditional European partners of Colombian HEIs. The participation of Colombia in co-operation programmes such as Erasmus+ (formerly Alfa, and Erasmus Mundus) and Horizon 2020 (formerly FP), has been increasing. There are also significant opportunities for bilateral co-operation with agencies such as NUFFIC, DAAD, the British Council, etc. Colombian institutions need to develop mutually beneficial and long-term relationships, and these existing co-operation mechanisms are good ways to begin.

Finally, it is important to point out that this report has attempted to provide a general overview of the internationalisation process in Colombian higher education. Some aspects require further investigation, such as the rate of progress in internationalisation of HEIs compared to other periods, the funding programmes for PhD and master's courses abroad and their impact on the internationalisation process, the impact of co-operation and collaboration initiatives with EU countries, and other aspects more difficult to research due to the lack of existing data.

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17. JAPAN

Miki Horie[50]

17.1. Introduction

Since the 1980s Japanese higher education institutions have undergone a number of reforms in response to government internationalisation initiatives, and an ongoing policy "Top Global University Project (TGUP)" challenges universities to transform themselves in more fundamental and comprehensive ways over a 10-year period. The government's rationale for internationalisation has shifted from capacity-building in other countries to improvement of its own higher education system. The expectation of current initiatives is that comprehensive internationalisation will enable universities to produce a workforce which is more efficient and able to contribute to the economic development of Japan. With a rapidly ageing population of 128 million, the decline of economic power in the global market is a major concern for the government and industry.

Higher education institutions strive to respond to competitive funding opportunities to promote internationalisation in broader terms than the mere production of the workforce needed by society. At institutional level, internationalisation is generally understood to have a positive influence on students' personal development and intellectual growth and to create a ripple effect in cross-border peace building. In recent decades, interactions between policymakers, including both the government and at institutional level, and international education practitioners have brought a meaningful accumulation of knowledge and expertise for further development of internationalisation policy, and such interactions will continue to contribute to the further professionalisation of this field in Japan.

17.2. The Japanese higher education system: considerations of capacity and social demand

The Japanese higher education system consists of universities (daigaku), which confer bachelor's, master's, and doctoral degrees, 2-year junior colleges (tanki daigaku), and vocational schools including colleges of technology (koto senmon gakko) and specialised training colleges (senshu gakko), regulated by the School Education Law. Besides these institutions governed by the Ministry of Education, Culture, Science, and Technology (MEXT), other ministries govern vocational HEIs, such as the National Defence Academy, the Meteorological College, and the National Fisheries University.

In 2014, universities enrolled 2 855 000 students (2 552 000 undergraduate and 251 000 postgraduate). Additionally, there were 137 000 students at junior colleges and 58 000 at vocational schools. Enrolment numbers are declining, as is the population of 18-year olds: in 2014 universities recruited 14 000 fewer students (10 000 at undergraduate and 4 000 graduate level) in comparison with the previous year. In 2011, the enrolment rate in the 18 year-old cohort was 51 % for universities, and 80 % for the overall higher education system (MEXT, 2014a).

There are 782 universities in Japan, including 86 national, 90 local public, and 606 private institutions. National universities were corporatised in 2004, and their governance system

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is independent of MEXT. Local public universities are run by either municipal or prefectural government. Private universities, which are attended by around 80% of the total student population, are run by school corporations. All institutions are non-profit based, receive a government subsidy to cover part of their running costs, and are subject to government quality control (MEXT, 2014a).

The total capacity of higher education institutions almost covers the relevant age cohort population (92.4 %). Nearly 50 % of private institutions accept fewer students than their authorised capacity, and more than 30 % of private institutions are not able to cover all expenses from their own revenue (MEXT, 2014b).

The employment rate of new college graduates is generally high. In 2014, 565 571 students completed their undergraduate programmes, and 65.9 % of them were employed in full-time positions immediately after graduation. Of the remainder, 12.6 % continued in education, 6.5 % were employed on a part-time or short-term basis, and 12.1 % were preparing for employment or further study. The ratio of students who obtained a job immediately after graduation to those who wished to work was 94.4 % for university graduates and 94.7 % for all higher education institutions (MEXT, 2014a).

Higher education commences upon completion of a 12-year cycle of primary and secondary education. Primary education and the first 3 years of (lower) secondary education is compulsory and free of charge. The enrolment rate for upper secondary schools is 92.5 % (100.8 % including evening and distance courses), at which point students can opt for either general or specialisation-focused courses. Japan's high performances in PISA and PIAAC are both attributed to the efficiency of its primary and secondary education (OECD, 2013, 2014).

17.3. Japan and East Asia

Several supranational initiatives have been developed to promote regional exchanges, such as UMAP (University Mobility in Asia and the Pacific) and the Japan-China-Korea Committee for Promoting Exchange and Co-operation among Universities, for both of which Japan was one of the initiating countries. UMAP created UCTS (the UMAP Credit Transfer Scheme) to promote credit transfer among 29 member countries and regions (MEXT, 2014c). The Japan-China-Korea Committee, launched in 2010, produced the CAMPUS Asia scheme for multilateral mobility. The development of AIMS (ASEAN International Mobility for Students) is also an objective of national strategy. Despite existing student mobility, no political consensus has been reached on the further development of the regional higher education arena (Yonezawa & Meerman, 2012).

17.4. National policies for internationalisation: competitive grant-based projects as the driving force

17.4.1. Evolving rationale for internationalisation

The internationalisation of Japanese higher education has been characterised by a series of government initiatives, which highlight the importance of this issue in terms of national policy for higher education development. Originally focused on the capacity building of other nations, since the year 2000 quality improvement of the home institutions in the face of global competition has been an added rationale. The national strategic plan announced in 2013 introduced a further consideration, namely the development of global human resources, and this isreflected in the objectives of current projects for the

internationalisation of higher education. A unique aspect of this whole issue is that the Japanese government and HEIs have never expected revenue generation to be a consequence of internationalisation (Kuroda et al, 2014).

Internationalisation as a comprehensive reform began in the 1980s when the government announced a policy whose aim was to increase the number of international students from 10 000 to 100 000 by the year 2000, allocating funds from the overseas development aid budget to assist institutions in expanding their capacity through the development of international student services, accommodation services, and Japanese language training programmes amongst others (Horie, 2002). This policy allocated further funding to reduce tuition fees for international students, and some institutions established additional tuition waiver and/or scholarship schemes from their budgets. Some active international educators indicate that this was a significant period for Japanese universities, a time of critical self-examination and improvement of institutional quality, which then served as a foundation for further internationalisation (Horie, 2003).

Since the year 2000, the government has announced a series of multi-layered internationalisation policies aimed at improving the quality of Japanese universities. Some policies led to the development of research-focused internationalisation projects such as the "21st Century Center of Excellence" and "Global COE[51]", which aim to concentrate budget and expertise into selected research agendas. Global COE promoted ten projects which received a budget of 50-300 million yen (EUR 350 000 to 2 million) per institution per year for five years. In 2007, the World Premier International Research Centre Initiative (WPI)[52] was also launched and is currently supporting nine research projects with 1.3-1.4 billion yen (EUR 9-9.8 million) per project per year for 10-15 years.

The "Strategic Fund for Establishing International Headquarters in Universities",[53] introduced in 2005, used the word "strategic" for the first time in the context of internationalisation. The MEXT allocated a budget of 10-40 million yen (EUR 70 000-280 000) per institution per year to 20 selected universities for 5 years as seed money for their strategic internationalisation. The Japan Society for the Promotion of Science (JSPS), commissioned by MEXT to operate the project, set up a scheme for the systematic assessment of outcomes and extraction of good practices throughout its duration, including organisation and governance, goal setting and action plans, external funds for international programmes, cross-border partnerships, transnational research opportunities, staff development, international scholar services, international opportunity for young researchers, and operation of overseas offices (Ota, 2014).

This initiative was followed by various competitive grant-based projects. The aim of the "Global 30[54]" project was to increase inbound mobility to 300 000 by 2020. Thirteen pilot universities received selective investment to implement internationalisation policies: English-taught degree programmes, multi-lingual and intercultural services on campus, expansion of accommodation capacities, programming of institutional and collaborative student recruitment activities at overseas offices, and so on. The pilot universities received a subsidy of 200-400 million yen (EUR 1.4-2.8 million) per institution per year for 5 years from April 2008 to March 2013. A national policy for expanding outbound mobility, "Go Global Japan",[55] granted subsidies of 120-260 million yen (EUR 0.8-1.8 million) per

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[51]   http://www.jsps.go.jp/english/e-globalcoe/index.html
[52]   http://www.jsps.go.jp/english/e-toplevel/
[53]   http://www.jsps.go.jp/english/e-bilat/e-u-kokusen/
[54]   http://www.jsps.go.jp/j-kokusaika/
[55]   http://www.jsps.go.jp/j-gjinzai/index.html

institution per year to 42 institutions to expand their capacities to provide quality student mobility, mainly outbound programmes, and international education opportunities on campus.

The current government-initiated projects were developed on the basis of several policy reports, which criticised the slow progress in the internationalisation of Japanese universities in terms of global competitiveness (Kyoiku Saisei Jikko Kaigi, 2013; Prime Minister of Japan and His Cabinet, 2013). These policy reports stress the value of internationalisation as an impetus for strengthening higher education institutions by exposing all stakeholders to cross-cultural environments and global competition. The target numbers - 300 000 inbound and 120 000 outbound students by 2020 - were also indicated as a guideline for the development of current projects. Meanwhile, various government-appointed working groups and research projects consisting of higher education experts and stakeholders have been working on various aspects of policy implementation, such as a strategic approach to international student recruitment, reform of the national scholarship system, establishing a quality assurance scheme, overseas campuses, development of joint degree programmes, promotion of study abroad, and other issues (MEXT, 2014d; Taniguchi, 2011; Taniguchi, 2012).

17.4.2. Current major national projects for internationalisation

The aforementioned national policies resulted in the following key projects, which will provide basic principles for further internationalisation in the coming decade: (1) Top Global University Project, (2) Re-inventing Japan Project, and (3) "TOBITATE! Leap for Tomorrow Study Abroad Campaign".

(1) "Top Global University Project (Su-pa guro-baru daigaku sousei shien)."[56] Launched in 2014, the TGUP aims to intensify the internationalisation process through fundamental university reform over a 10 year time-span. Its objectives include strengthening the role of higher education in national development, fostering global human resources, and increasing the visibility of Japanese universities in the global higher education market (JSPS, 2014a).

Two categories were identified in the project, each of which pursues different models of internationalisation. Type-A relates to a group of universities, mostly research-intensive, that aspire to a position in the top 100 in the world rankings. Type-B universities seek to intensify their own internationalisation process. Consequently, Type-A universities must consider the criteria and the standards applied by some of the major world ranking systems, whereas Type-Bs are encouraged to develop their existing international projects and further enhance their international profile, with the aim of attaining a global standard.

Applying institutions were required to consider how they envisaged improving their services to the local and global communities over the next 10 years. Each applicant was expected to develop its vision and university-wide action plans in accordance with its core mission and unique features to create a list of objectives to achieve in 10 years, including plans to expand international profiles, reform governance systems, and improve quality in teaching and learning, internationalisation of the curriculum and outcome assessment. The entire application process encouraged institutions to undergo a process of comprehensive self-evaluation and long-term strategic planning.

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[56]   http://www.jsps.go.jp/j-sgu/index.html

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The total budget for the 2014 financial year was 7.7 billion JPY (EUR 56 million), and 420 million JPY (EUR 3 million) will be allocated to each Type-A institution and 172 million JPY (EUR 1.25 million) to each Type-B institution per year. The grant is for 10 years and relates to financial years 2014-2023. The panel of experts and industry representatives appointed by the government has selected 37 institutions (13 Type-As and 24 Type-Bs) from 104 applications (JSPS 2014a).

(2) "Re-inventing Japan Project (Daigaku no sekai tenkairyoku kyoka jigyo)."[57] The "Re-inventing Japan Project" is another competition-based grant programme promoting bilateral and multi-lateral mobility by establishing creative programmes with partner institutions in specific target countries and regions, the choice of which reflects various political priorities. In 2010, the project called for proposals to set up bilateral programmes with the US and/or multilateral programmes with the China-Korea-Japan triangle, followed by programmes with ASEAN countries in 2011, which evolved into programmes with ASEAN International Mobility for Students (AIMS) in 2012, then focused on Russia and India in 2013. The 55 selected programmes are now being implemented as pilot programmes (JSPS, 2014b).

This project encouraged institutions to promote cross-cultural peer learning as a core principle of the programme development. For example, in the "East Asian Leaders Programme" developed by Ritsumeikan University (Japan), Guangdong University of Foreign Studies (China), and Dongseo University (Korea), participants from 3 institutions form a cohort group and travel around three universities, spending six trimesters together. By living and learning together intensively, students built relationships of trust and safe environments in which to discuss historical political conflicts shared by all three countries, the interpretation of historic incidents, post-war compensations and territorial disputes, amongst others.

(3) "TOBITATE! Leap for Tomorrow Study Abroad Campaign (Tobitate ryugaku japan)."[58] "TOBITATE!" is a nation-wide campaign to increase the number of Japanese students studying overseas from around 60 000 in 2014 to 120 000 in 2020. TOBITATE! also runs the "TOBITATE! Young Ambassador Programme (YAP)", offering scholarships to support Japanese students studying abroad on their own choice of programmes, either through their home institutions or self-sourced, for periods ranging from one month to one year, as well as collective educational programmes to maximise learning experiences before, during, and after the study abroad period. YAP emphasises the long-term aspect of learning generic skills such as resilience, adaptability, flexibility, and confidence throughout the study period abroad and career development, and provides assistance for various types of students who are not typically offered academic-type scholarships. The first programme cohort of 323 students was selected from 1 700 applications.

This programme is characterised by strong collaboration with industry. Personnel from various business sectors participate in the selection process and pre-departure programmes, offer internship opportunities, support job-hunting procedures, and other tasks. The project has also collected financial contributions of about 8.5 billion JPY (EUR 63 million) from 92 companies (as of October 2014), and their target amount is 20 billion JPY (EUR 150 million) by 2020 for its scholarship funds. To break down barriers between the public and private sectors, the project team has been selected from both government and industry.

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[57]   http://www.jsps.go.jp/j-tenkairyoku/
[58]   https://tobitate.jasso.go.jp

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17.5. Other stakeholders: the emerging influence of industry

In recent years Japanese industry has been lending its support in the formulation of higher education policy. The business community is aware of increasing global competition, especially with emerging economic powers and, at the same time, admits the fact that Japan's "lost decade" since 1990 and the years of economic stagnation did little to promote a global human resource building programme. The Japan Business Federation (2011) encouraged the consolidation of human resource development and innovation in research in order to expand Japanese markets and to meet the demands of emerging countries.

Other stakeholders such as foundations and local governments have also played significant roles, primarily by offering financial support for student mobility in specific regions or communities and in line with their organisational missions or local demands.

17.6. Institutional responses: the rich get richer?

Throughout this period of policy implementation, universities will accumulate knowledge and experiences through institutional learning, including trial and error, good practice sharing, and professionalisation of the field of international education. The designated institutions of each government project receive seed money to start up the proposed programmes and are responsible for accumulating knowledge on how to maximise the pedagogical effect of such programmes through programme implementation, evaluation, and assessment. They are also responsible for organising faculty/staff development opportunities in order to disseminate their insights. In practice, some institutions promote internationalisation more than others, making them more likely to be selected again by another competitive project because the selection process examines an institution's capacity as well as its action plan. The current system may create a "rich get richer" phenomenon in Japanese higher education.

Some universities have played important roles as Japanese models of internationalisation, such as the "Global 5 Universities",[59] which is a network of internationally oriented universities founded in 2010 which work together to advance the process of internationalisation in their institutions ande seek to contribute to further internationalisation in other universities. They have more experience of promoting international education opportunities, including offering English-taught or bilingual degree programmes, student recruitment, hiring of international faculty and staff, internationalisation at home, sending students overseas, and others. Some of their experiences have been shared widely through professional development opportunities, and some of those aspects are also taken into account in current government policy development.

The proposals submitted by the selected TGUP institutions illustrate some trends of institutional policy in response to the government initiative. For example, Nagoya University (Type-A) intends to support under-represented groups of researchers (young, female, and/or foreign) in expanding their research profile, and to promote capacity building by establishing satellite campuses in Asian countries. Ritsumeikan University (Type-B) emphasises university-wide efforts to develop students' intercultural skills and internationalisation of the curriculum with a view to promoting peace and mutual understanding of different societies. It gives special prominence to Asia as a target region (JSPS, 2014a).

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[59] http://www.apu.ac.jp/home/news/article/?storyid=2436&version=english

17.7. Key performance indicators of internationalisation: much progress still to be made

17.7.1. International students

In 2013 the total number of international students[60] was 135 519, representing 4.7 % of the overall college student population (JASSO, 2014a). Numbers reached their peak of 141 774 in 2010 but have since declined, in spite of the "300,000 international student" initiative introduced in 2009. The reason for this decline may be linked to the East Japan Earthquake in March 2011 and the (mis)perceptions of students and their parents that Japan is radiation-contaminated. Moreover, Japan is no longer the top North-East Asia destination for study abroad, with China and Korea reporting comparable international student numbers (265 090 and 83 842 respectively in 2010) (Yonezawa & Meerman, 2012).

More than 90 % of international students are degree-seeking, including 30 % of graduate students. Over 70 % attend private institutions. The most popular fields of study include social sciences (38.6 %), humanities (21.1 %), and engineering (17.2 %). Students of Asian origin represent 91.9 % of the entire international student population. Chinese (60 %) and Korean (12 %) students make up a large proportion, but their numbers have continued to decline in recent years. In the next tier-group numbers are smaller but rising rapidly, and relate to Vietnam (5 %), Taiwan (3.5 %), and Nepal (2.4 %) (JASSO, 2014a).

The demography of non-degree seeking students, or participants in exchange or short-term programmes, is less skewed towards the Asian region (60.6 %), with Europe at 21.2 % (JASSO, 2014a). Non-degree programmes, such as exchange programmes and short-term programmes, are operated through partnership agreements in countries selected by the institutions based on their strategic priorities.

17.7.2. International staff

International teaching staff, like international students, currently have a low profile. International teaching staff (19 499) represent 5.2 % of overall faculty staff (371 627), including full- and part-time instructors. Only 3.9 % of faculty staff are full-time international staff. Of 1 793 university presidents and vice-presidents, only 23 (1.3 %) are foreigners. The current national policy target for international faculty is 10 % by 2020.

Kitamura (1989) pointed out that one of the major obstacles to the internationalisation of higher education was the historically complex process of foreign teacher recruitment at Japanese universities. In the late 19th century, Japanese universities resolved to import Western disciplines by hiring foreign professors to teach in their own languages. The students were then expected to learn the necessary languages to take the courses. However, in a bid to limit their dependency on foreigners, the universities offered their foreign staff neither tenure positions nor the opportunity to participate in administrative functions. This trend continued at least until the 1980s. Since then internationalisation policy has made efforts to change this state of affairs, and some TGUP universities are working towards increasing the ratio of foreign faculty members to 50 % by 2020.

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[60] An "international student" is defined as a foreign national college student who has obtained immigration eligibility with "foreign student" status under Japaneseimmigration law. Non-Japanese students with different immigration statuses have been excluded from this figure.

17.7.3. Study abroad

The number of Japanese students studying abroad has fallen by about 30 %, from 82 945 in 2004 to 57 501 in 2011 (MEXT, 2014e). The population size of the 18 year-old cohort, which is similar to the age cohort of those studying abroad, also decreased about 15 %, from 1.4 million in 2004 to 1.2 million in 2010 (Statistics Bureau, 2014), so the overall rate of decline for study abroad is not as drastic as it initially appears.

A more significant change was noted in the number of Japanese students studying in the United States, which remains the biggest host destination (34.7%). In the late 1990s, Japan was one of the top countries for sending students to study in the US, but the statistics show a 57 % fall-off in the past decade, from 46 497 in 2000-01 to 19 568 in 2012-13 (Institute of International Education, 2014). Seeing this situation as cause for serious concern, the United States-Japan Conference on Cultural and Educational Interchange (2013) proposed a policy agenda for both countries to take initiatives aimed at doubling the number of US and Japanese students studying in each other's country by 2020.

The second largest destination, China (31.2 %), and the fourth, Taiwan (5 %), both increased in popularity, and other destinations, including the United Kingdom (6.4 %), Australia (3.7 %) and Germany (3.2 %) have all seen student interest decline in recent years.

There are a number of possible explanations for the decline. First of all, Japanese students do not generally consider that a study abroad experience enhances their employability on the job market. As discussed earlier in this report, students enjoy a relatively high employment rate, which is produced by a collaborative job-hunting/hiring system lasting from the end of the junior year to the middle of the senior year. Some overseas programmes overlap with this period, and students tend to take the safer option of staying in the mainstream schedule rather than choosing an alternative that does not necessarily guarantee their future success. Moreover, employers do not regard study abroad experiences as a valuable attribute in hiring new college graduates (Ota, 2013). Since Japan traditionally practises life-long employment, the general tendency of Japanese companies is to look more at the potential of applicants as long-term employees and to offer in-house training according to his/her assigned job responsibilities. Job mobility is another non-traditional career development strategy, which is gaining in popularity, but today's students have not been exposed to such alternative career models often enough to be convinced that study abroad is a promising experience for personal growth. One of the significant roles of the current government initiatives is to override the doubts concerning the value of study abroad in the students' mindset.

On the other hand, the number of participants in programmes offered by their home institutions is increasing from 28 804 in 2011 to 43 009 in 2013, and top destinations include the US (24.1 %), China (10.3 %), Korea (10.1 %) and others (JASSO, 2014b). Such programmes are integrated into the students' curriculum, allow for more scholarship opportunities, and receive a variety of educational grants from the home institutions. The national policy prioritises this type of outbound mobility rather than simply sending individuals overseas.

17.7.4. Language of instruction

In 2011, approximately 30 % of institutions offered courses taught in English, including 26 undergraduate and 174 graduate programmes (MEXT, 2012, 2013a). In addition, 66

universities offer a series of English-taught courses to meet the special needs of inbound exchange students. The TGUPselected universities are to increase the ratio of English-taught courses by 2020.

Increasingly, universities encourage or require faculty members, both native and non-native speakers of English, to teach in English. Improved language proficiency and pedagogical skills in non-native languages has therefore been added to the agenda for faculty development training. Many new faculty positions also ask applicants to demonstrate their teaching skills in English.

17.7.5. International partnerships, double and joint degrees, and overseas branches

General partnership agreements totalled 19 102 in 2012, including China as the most popular partner (20.2 %), followed by the US (11.8 %), Korea (11.3 %), Taiwan (4.9 %), the UK (4.6 %), and others (47.2 %) (MEXT, 2013b). By 2011, 336 (44 %) institutions had credit-bearing exchange schemes. Diversification and strategic selection of destinations are encouraged by several current national policies: many TGUP-designated institutions focus on Asia, and the "Re-inventing Japan Project" focused on several specific nations and regions, such as China-Korea, the US, ASEAN countries, Russia, and India. The demography of overseas partners is predicted to become more diversified.

Double and joint degree programmes are also one of the key focuses of current national policy. In 2011, 143 institutions offered double degree programmes at both undergraduate and graduate levels (MEXT, 2013a). These double degree programmes are based on a credit transfer system, which enables students to meet certain degree requirements by bringing credits from the partner institution. In 2014, the first joint degree programme in Japan, at DIU-RU International School of Information Science and Engineering, was established by Ritsumeikan University and Dalian Institute of Technology in China.

Overseas branch offices also increased in number from 227 in 2007 to 431 in 2011 (MEXT, 2013b). The national universities, especially the research-intensive ones, account for 66.8 % of these. Locations include China (27.6 %), Thailand (8.1 %), the US (7.9 %), Vietnam (7.1 %), South Korea (5.8 %) and others (43.5 %). These offices primarily provide support for joint research projects, liaison and public relations in the local region, student recruitment, or services for Japanese students studying in the region.

17.7.6. Capacity building

According to the Ministry of Foreign Affairs (MOFA) (2014), the total government budget for Overseas Development Aid (ODA) has fallen by 50 % from 1 168.7 billion yen (EUR 8.5 billion) in 1997 to 550.2 billion yen (EUR 4 billion) in 2014. The higher education contribution to capacity building is implemented through various government ministries, including MEXT and MOFA.

The MEXT scholarship for foreign students also began as a capacity building policy in 1954 with the allocation of the budget from the ODA scheme. In 2013, it offered the scholarship including a monthly stipend of 117 000 yen (EUR 860), airfare and tuition fees to 8 529 international students. The government plans to offer this opportunity to various countries with the strategic intention of meeting the specific educational demands of certain countries or regions (MEXT, 2014f).

In the mid-1990s, graduate schools for international co-operation and development were established at several national universities. The programme was designed to promote human resources by empowering students to then contribute to the development of their own countries in the establishment of legal systems, agricultural development, human development, and so on. Similarly, the Young Leaders Programme provides a one-year graduate degree programme for international students who are already working in the fields of community administration, medical administration, legal administration, and others (MEXT, 2014g).

The Japan International Cooperation Agency (JICA) was established in 2003 as an incorporated administrative agency in charge of managing the Japanese government's international co-operation activities. It develops various platforms for universities to join in collaborative activities for international co-operation. Examples include the MJIIT project (Malaysia-Japan International Institute of Technology) and E-JUST (Egypt-Japan University of Science and Technology).

17.8. Further challenges: collective learning for comprehensive transformation

Government initiatives culminating in a series of competitive projects to promote internationalisation and creative institutional responses have been a driving force for improvement of the higher education system in Japan. Some institutions introduced pilot programmes from which they derived useful learning opportunities, and the institutional insight gained from these practical experiences was also passed on to government and institutional policy makers through various channels.

The traditional institutions are faced with the challenge of culture change, of integrating innovative and future-oriented change-makers into a collective decision-making process. But these organisational culture changes are time-consuming and may be dominated by conservative opinions. When successful, as has been the case at some Japanese universities, the collective decision-making approach is effective in getting the various stakeholders involved in the decision-making process, including students, teaching staff of various academic disciplines, administrative staff with various responsibilities, alumni and local communities. However, current policy also emphasises that organisations should learn to speed up this process, as well as to include more under-represented members with diverse backgrounds. The first measure of organisational culture change must be to step up the levels of internal communication and establish internationalisation as a shared core value for reform.

Another challenge is the creation of innovative professional training opportunities for those who directly and indirectly support internationalisation processes. The initiatives of the 2000s provided training opportunities mainly through good practice sharing, which were effective in specific learning models. However, most of the programmes are practice-oriented and do not cover theoretical frameworks or pedagogical considerations that give conceptual foundations for developing further innovative models. In future, higher education practitioners and international educators could yield greater influence over the policy-making process if they learn how to effectively communicate their opinions for future initiatives based on their own experience.

This empowerment of higher education practitioners is important in terms of yet another challenge, namely bridging the gap between government and educational institution rationales. Both share general values in terms of internationalisation, but their focuses are

not the same. The government highlights economic development, but the institutions perceive the core value of internationalisation as self-advancement, including quality improvement of teaching and learning, research, services, and governance and regard the production of the workforce required by society as only one aspect of its role. This gap should be bridged through vigorous debate among policy-makers, international education experts, and other stakeholders in order to implement the ambitious internationalisation policies in pedagogically meaningful ways.

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18. MALAYSIA

Abdul Razak Ahmad[61]

18.1. Introduction

National higher education policy is commonly formulated with a view to enhancing the development of human capital through higher education for the benefit of nation building and national development. In Malaysia, the internationalisation of higher education is a key strategic thrust of its national higher education policy. The strategy has been crafted in view of the transformative developments and shift in the global higher education landscape that require traditional academia to undergo a process of regeneration in order to meet the new challenges and opportunities offered by an increasingly competitive global environment. This report scrutinises Malaysia's internationalisation policy for higher education within this fast-changing global context. It examines the agenda of Malaysia's economic transformation, its higher education system, and its national policy strategies for the internationalisation of higher education. It provides background to stakeholder roles, strategic targets, challenges and a road map for the way forward. The report also specifically discusses the role and/or impact of European institutions and their policies on HE internationalisation on Malaysia's own internationalisation agenda.

This report is intended to show that Malaysia's experience reflects global trends, but also that Malaysia requires bold and multifaceted policy initiatives to intensify its internationalisation of higher education. Although the focus until now has been to make Malaysia an international student hub, it needs to do more to strengthen the Education Malaysia brand with a focus that stretches beyond promotion and recruitment. Malaysia should mobilise its resources and experiences to focus on promoting its strength as a higher education exporter and not just a hub of learning. It needs to move into new frontiers, such as international research collaboration and mobility of students and academics, and to transform Malaysian universities into global operators. This report also argues that intensive interactions across and potentially beyond the region are crucial to Malaysia's internationalisation policy, but that a number of issues, relating to mutual qualification recognition and quality assurance still need to be addressed.

18.2. Malaysia's economic agenda and higher education

Malaysia's economic development has been impressive in recent decades. Strong macroeconomic management and political stability have made it the 20th most competitive economy globally (Schwab, 2014). However, Malaysia must sustain its competitive edge. A transformation into an innovative, knowledge-based economy is essential, underwritten by success factors in the fields of science, technology, engineering, creativity and understanding of humanities and social sciences.

The current administration has introduced economic initiatives as part of its strategy to become a developed country by 2020 (Office of the Prime Minister, nodate). These include the New Economic Model, the Malaysia Plan, and the National Key Economic Areas (NKEAs) (Economic Planning Unit, 2010a, 2010b, 2010c). These documents articulate Malaysia's ambitious programme. It is unprecedented, and reflects the massive effort by the government to make Malaysia a competitive, high-income nation.

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[61] The author wishes to recognise express his thanks to Associate Prof Dr Lai Yew Meng, Dr Wan Chang Da and Dr Doria Abdullah for their insights and constructive comments in revising the content of this report.

Under the current Tenth Malaysia Plan 2010-2015, planned economic growth focuses on the NKEAs. An NKEA drives economic activity that contributes quantifiable growth to the Malaysian economy (Jala, 2010). Higher education services are high on the strategic agenda that prioritises growth. Few sectors of the Malaysian economy have developed as impressively as higher education services.

18.3. Malaysia's higher education system: expansion, privatisation and internationalisation

Growth in Malaysian higher education in the past three decades has been consistent and unprecedented. In 2011, Malaysia spent the equivalent of 3.8 % of its gross domestic product on education, over twice the average 1.8 % within ASEAN nations (World Bank, 2013). Malaysia's wide range of schools achieved almost universal access with 9 in 10 Malaysian adults completing at least lower secondary education (World Bank, 2013). An increasingly affluent Malaysian society sees democratisation as the main avenue for social mobility and equality, and this contributes to a strong demand for higher education.

Malaysia has faced many challenges in developing higher education over the past three decades: widening access, increasing equity, seeking funding, reforming regulatory frameworks and governance, enhancing relevance and quality, and improving delivery. In 2004, the Ministry of Higher Education was created to facilitate this national strategic direction. Soon afterward, the Ministry launched the National Higher Education Strategic Plan (NHESP) in 2007, the blueprint for making Malaysia a hub for higher education excellence by 2020.

> Malaysian higher education operates on the basis of a dual system (World Bank, 2007). The first group consists of government-funded higher education institutions: public universities, polytechnics, community colleges and teacher training institutions. The second comprises privately-funded institutions: private universities, colleges and foreign branch campuses. Each group is regulated by different sets of laws, the first by the Universities and University Colleges Act 1971, and the second by the Private Higher Education Act 1996. The existence of two separate laws, by creating different regulatory standards and offering an uneven playing field for the country's higher education providers, has resulted in the industry becoming less competitive (Ministry of Education Malaysia – MoE, 2014). In response, the NHESP has recommended that a single, new, consolidated piece of legislation, the Malaysian Higher Education Act, be introduced (MoE, 2014).

Over the last decade, Malaysia's private higher education sector in particular has experienced tremendous growth. There are currently 20 public universities, 73 private universities and 403 private colleges. Public universities are categorised as research, comprehensive and focused universities. Differences here lie in the fields of study, funding, and ratio of undergraduate to graduate students.

Private higher education institutions (HEIs) come in two categories – university status and non-university status. Private colleges fall within the latter. University-status HEIs include private universities, university colleges, and foreign branch campus universities, for example, the University of Nottingham Malaysia Campus and Monash University.

From the year 2007 to 2013, the number of private universities increased as colleges began to upgrade to university status. However, in 2013, the Ministry declared that the

increase exceeded national requirements, and a two-year moratorium brought the process to a temporary halt, although foreign university branches were exempt (Kulasagaran, 2013). Private HEIs, of which the main revenue source are student fees, vary widely in terms of their business models. Some are listed on the Bursa Malaysia (formerly the Kuala Lumpur Stock Exchange), while others are either private for-profit institutions backed by corporations, government-linked company universities, or non-profit institutions supported by charitable foundations and political parties.

Private higher education providers have made the phenomenal growth of Malaysia's higher education system possible. Overall, there has been a 5.5 % increase in enrolment from 1998 to 2011 (Wan et al, 2014). In the future, upgrades to university status and increased access may increase private HEI enrolment further still.

Meanwhile, over the past fifteen years, a year-on-year increase has been noted in the numbers of Malaysians pursuing their higher education abroad. In fact, the number has more than doubled over a period of ten years between 2002 and 2011, with most students enrolling in HEIs located in traditionally popular and renowned higher education destinations such as Australia, United Kingdom, the USA, New Zealand and even Taiwan and Singapore. While concerns have emerged regarding a possible substitution effect developing as a result of pursuing tertiary education overseas, especially since private higher education was established in Malaysia as a measure to help counter the outflow of talents and funds, the number of students enrolled in both local private HEIs and abroad does not support this view. Instead, the number of students in both spheres shows consistent growth over the stipulated period (see Table 1)

Table 9: Student enrolment for Bachelor's degree programmes and above in public universities, private institutions and abroad

Year	Public Universities	Private Institutions	Abroad
2002	213 599	71 278	42 780
2003	224 672	93 765	42 109
2004	231 403	108 414	43 279
2005	245 664	106 842	56 609
2006	263 067	131 408	53 924
2007	288 431	146 037	54 915
2008	318 493	161 462	59 107
2009	331 561	214 410	58 937
2010	342 084	238 141	77 623
2011	375 040	200 332	89 686

Source: Malaysia Higher Education Statistics, 2002-2011

18.4. Internationalisation of higher education policy

Malaysia's aspiration to become a highly developed country by 2020 provides impetus for an increase in investment in human capital. This vision is manifest in various official policy documents. The Sixth Malaysian Plan calls for the private sector to deliver higher education

services via twinning programmes between Malaysian colleges and foreign universities (a landmark initiative in propelling Malaysia's internationalisation agenda) (Economic Planning Unit - EPU, 1990). Twinning programmes were introduced between Malaysian colleges and foreign universities, a model that has generated interest from foreign providers eager to take advantage of the increasing demand for tertiary education in such a fast-developing country. These programmes have enabled many Malaysian colleges to improve in terms of quality assurance and the manner in which they deliver teaching and learning.

This initiative was reinforced in a review of the Sixth Malaysian Plan in 1993 by the introduction of a policy to promote education services as a focal point strategy for contribution to national revenue and, ultimately, to establish Malaysia as an education hub (EPU, 1993). The same vision and economic rationale are repeated in subsequent government plans and documents (Tham, 2013). It is best reflected in the National Higher Education Strategic Plan (NHESP) 2020. The plan outlines the country's aim to be a hub of educational excellence in the region and beyond. A total of 150 000 international student enrolments were planned by 2015, and 200 000 by 2020. Two policies complement the plan: Intensifying Malaysia's Global Reach: A New Dimension (Tham, 2013), and Internationalisation Policy for Higher Education. Both were launched in 2011.

Malaysia's internationalisation policy aims to establish the country as a regional education hub focusing primarily on inbound students from the region (Knight & Sirat, 2011). However, it is argued that Malaysia's internationalisation strategy is striving to position the country as an international student hub. Knight and Sirat (2011) argue that Malaysia needs to ensure the transformation of this policy into the next levels of a talent/skilled workforce hub and knowledge/innovation hub. Cheong et al (2011) argue that there is a sharp contrast between numbers and quality of students, whereby high rates of foreign student recruitment does not necessarily equate with the high rate of talent needed to create sustainable economic growth and push Malaysia into a high-income status country. The review committee of the NHESP (MoE, 2014) voiced a similar sentiment, stating that, in line with Malaysia's South-South initiative, the country should strive to become a talent hub, as opposed to merely an international student hub, at least among the least developed and developing countries.

A study commissioned to examine the readiness of HEIs, academics and students to achieve this transformation indicated five major constraints and barriers. They include lack of talent and guidance of talent, research funding, infrastructure, facilities and research culture, interaction among researchers, and links between university and industry (National Higher Education Research Institute, Malaysia - NHERI, 2014). Although these constraints and barriers may hinder the transformation of Malaysia from a student hub into a talent and/or knowledge/innovation hub, many more policy reforms are needed in not only the higher education sector but across the board.

Making a success of Malaysia as an international student hub requires regulatory reform and institutional measures from the Government. Malaysia has done this successfully. The Private Higher Education Institutions Act 1996 was instrumental in this process of transformation, impacting on the development of higher education in several ways. It provided a prominent role for private and foreign players in delivering services while boosting public confidence with a regulatory framework crucial to the development of a vibrant – yet regulated – set of private higher education services.

With quality assurance a necessary mainstay of credible higher education status in an international setting, the National Accreditation Act 1996 was introduced. This paved the

way for the institutionalisation of the National Accreditation Board, which was consolidated as the Malaysian Qualification Agency (MQA) in 2007. This served not only to ensure that students benefit from high quality educational experiences, but also established a level playing field for a sound quality regime between the private and public providers.

To further enhance internationalisation, the Ministry established a marketing division to promote Malaysia as a hub of higher education excellence. Five promotion centres were established in China, Dubai, Indonesia, United Arab Emirates, and Vietnam. The division was named EDUCATION MALAYSIA in 2011, and was designed to emulate the success of the British Council. EDUCATION MALAYSIA is now mandated to enhance Malaysia's visibility as a preferred destination for international students, while spearheading its international initiatives in higher education.

To further enhance the competitive potential of Malaysia's internationalisation programme, the policy document Intensifying Malaysia's Global Reach: A New Dimension was launched in 2011. This document sets a new direction and approach to Malaysia's internationalisation of higher education strategy. With it the Ministry embarked upon a clear attempt to embrace a broad set of activities over and above the generation of international student numbers. The document raises Malaysia's visibility and development potential in the international sphere via various networks, initiatives and programmes. It also calls for the intensification of global exchanges between Malaysia and other developing countries by targeting specific needs (Ministry of Higher Education, 2010).

The ultimate objective is to develop confidence and trust with partner countries through educational internationalisation. This policy clearly illustrates Malaysia's desire to use its educational strategy as soft power to enhance its influence in contributing to South-South socio-political and economic development. Part of this soft power strategy is best reflected in the implementation of various initiatives between Malaysia and the CLMV Countries (Cambodia, Laos, Myanmar and Vietnam). In 2008, Malaysia launched a series of initiatives to promote dialogue in higher education, specifically in leadership, research collaborations, students' mobility and other capacity building programmes. Since 2010, an annual research funding of RM 1.5 million has been allocated to facilitate various research projects between Malaysian researchers and their partners in the four countries. This funding, intended to finance studies and research into issues relevant to the needs of the four countries has been successful in two ways. First, it allows greater mobility between researchers, and second, Malaysian researchers have had the opportunity to play a leading role in key areas of research such as water policy, tropical diseases, higher education policy, poverty and social economic development.

Besides the funding for research-related activities, another RM 1.5 million has been allocated annually since 2010 to finance capacity building and international development projects in higher education. The initiatives include the development of the curriculum structure and content for Timor-Leste's Institute of Diplomatic Studies, the first-ever Malaysia Africa Summit in 2014, the formulation of the Palestine Higher Education Blue Print, the annual Malaysia-Indonesia Young Leaders of the Future Dialogue, the ASEAN Skills Initiative, the series of higher education dialogues with Turkey, Maldives and Indonesia and the various community and public health-related projects in Papua New Guinea, Fiji and Timor-Leste.

Malaysia's internationalisation policy is motivated by three important factors: economics (and export revenues in particular), human capital, and higher education as an instrument of soft power in the international sphere (Tham, 2013). With an estimated gross income of

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RM 30,000 per international student, Malaysia has so far generated RM 21 billion from enrolment over the last decade (MoE, 2012). Education services are now classified as one of the 12 National Key Economic Areas under the Economic Transformation Programme (ETP), generating some RM 27 billion – or 4 % of Malaysia's Gross National Income (GNI) in 2009 (MoE, 2012). The education sector is expected to generate RM 33.6 billion GNI with 535 000 jobs created in 2020 (MoE, 2012). These figures indicate that economic considerations remains central to Malaysia's internationalisation strategy.

The economic potential of Malaysia's international higher education system within the country's wider economic outlook has attracted increased interest from organisations wishing to venture into the higher education business. Khazanah Nasional – the state investment arm – is the most prominent, investing significantly in the development of EduCity in Johor, with the aim of creating a global international education hub. It is the largest investor in the education sector, with holdings in several educational institutions, including foreign branch campuses operating in Malaysia (Khazanah, 2013). Another government-linked private equity firm, Ekuiti Nasional Berhad, is an active investor in the sector (see Ekuiti Nasional Berhad, 2014). Foreign equity participation is now capped at 70 %. Allowing bigger equity participation has encouraged the setting up of foreign branch campuses like Nottingham, Monash, and Newcastle, and has allowed foreign investors like the Laureate International Universities (the world's largest operator of private universities) to acquire a substantial stake in a Malaysian university. Foreign confidence in Malaysia's education business potential places it in the top 11 destinations of choice for international students.

18.5. International student markets for Malaysia

The current national strategic plan sets a target of 200 000 international student enrolments by 2020. Although ambitious, it is achievable if some structural changes are made to the current regulatory framework, and to the visa regime in particular. Most international students in Malaysia are from specific regions, notably the Middle East and Africa. Interestingly, Malaysia is not a preferred destination for countries in Southeast Asia, except Indonesia, although there is a huge international student market in India, Nepal, the Philippines, Thailand and Vietnam. One of the main reasons why Malaysia is popular among Middle Eastern and African students is the ease of obtaining a student visa. Many Middle Eastern and African students found it difficult to obtain student visas to most developed countries after the September 11 incident in 2001. Table 2 presents an overview of the international student population from the top 10 sending countries between 2008 and 2011.

Table 10: Top 10 sending countries (2008-2011)

2008	2009	2010	2011
Indonesia (9 358)	Iran (10 932)	Iran (11 823)	Iran (9 888)
China (7 966)	Indonesia (9 812)	China (10 214)	Indonesia (8 569)
Iran (6 604)	China (9 177)	Indonesia (9 889)	China (7 394)
Nigeria (5 424)	Nigeria (5 969)	Yemen (5 866)	Nigeria (5 632)
Yemen (4 282)	Yemen (4 931)	Nigeria (5 817)	Yemen (3 552)
Saudi Arabia (2 752)	Libya (4 021)	Libya (3 930)	Bangladesh (2 323)
Botswana (2 350)	Sudan (2 433)	Sudan (2 837)	Sudan (2 091)
Sudan (2 307)	Bangladesh (1 957)	Saudi Arabia (2 252)	UK (1 530)
Bangladesh (2 021)	Botswana (1 939)	Bangladesh (2 041)	Pakistan (1 346)
Libya (1 788)	Iraq (1 712)	Botswana (1 911)	Iraq (1 329)
TOTAL: 44 852 (64.8 % of total int. student population)	TOTAL: 52 893 (65.5 % of total int. student population)	TOTAL: 56 580 (65.1 % of total int. student population)	TOTAL: 43 654 (61.4 % of total int. student population)

Source: Education Malaysia Division, Department of Higher Education, Ministry of Education, 2014.

International student recruitment falls under the purview of two major ministries: the Ministry of Education and the Ministry of Human Resources. The Department of Higher Education under the auspices of the Ministry of Education is responsible for overall international student recruitment policy and regulation of both public and private higher education institutions. The private higher education sector contributes 70 % of annual international student enrolment, while public universities, being highly subsidised by the government (Abd. Aziz, M.I. & Abdullah, D., 2014), restrict the enrolment of international undergraduate students. Postgraduate international students are concentrated in public universities and in research-intensive institutions in particular. Public universities have greater capacity and freedom in managing international graduate students.

With Malaysia still developing as a hub for skills-related training and capacity building, the Ministry of Human Resources' involvement in international student recruitment is less significant. While the current situation suggests a divergence in strategies on international student recruitment, there is a need to find a common pathway in streamlining the movement of international students between both segments, as well as strengthening the core missions of teaching, learning and research activities undertaken within and across each sector.

Malaysia's transformation into a knowledge-based economy will remain rhetorical if no serious effort is made to strengthen its research and innovation ecosystem. As a result, Malaysia has attempted to increase the number of international postgraduate students. As well as maintaining a reasonable ratio of undergraduate to postgraduate students, such efforts will strengthen Malaysia's contribution in science, technology and innovation by attracting global talent.

Table 11: International postgraduate student enrolment in Malaysia (2010-2013)

	Public Higher Education		Private Higher Education			% relative to overall international students
	Master's	PhD	Master's	PhD	Total	
2010	8 138	7 548	3 813	677	20 176	23.21 %
2011	8 076	9 420	4 474	535	22 505	31.65 %
2012	8 058	10 202	6 853	2 755	27 868	33.36 %
2013	8 197	11 368	8 530	3 075	31 170	37.27 %

Source: Education Malaysia Division, Department of Higher Education, Ministry of Education, 2014.

Despite showing a significant increase in international postgraduate students, Malaysia has a long way to go before such increases bear fruit in tangible terms. Competition for global talent intensifies daily and Malaysia has not yet provided sufficient incentives to attract foreign students to a point where their contribution to the growth of the country's knowledge economy could be described as transformative. At present it is not a bold enough strategy.

Malaysia's internationalisation of higher education has brought an increase in international staff. Table 6 shows staff levels in Malaysian HEIs over a seven-year period (2007-2013). International staff recruitment to public and private institutions has grown significantly since 2010.

Table 12: International staff in Malaysian higher education institutions (2007-2011)

	Public Higher Education	Private Higher Education	Total
2007	1 027	1 376	2 403
2008	1 261	1 634	2 895
2009	1 403	4 605	6 008
2010	1 681	5 003	6 684
2011	1 765	2 196*	3 961
2012	2 151	6 696	8 847
2013	3 599	6 655	10 254

Source: Education Malaysia Division, Department of Higher Education, Ministry of Education, 2014.
Data based on 87.96 % of private higher education institutions that contributed to the data collection exercise.

Forces shaping the internationalisation of Malaysia's higher education sector must take into account the strategy of regionalism. There is no better way for a country to achieve its best outcome than to deal with its immediate neighbours whom it understands best. In terms of the mobility of intra-ASEAN students within Malaysian public higher education institutions, the top three sending countries during the period between 2009-2013 were Indonesia (totalling 18,816 students), Singapore (2 755 students) and Thailand (3,820 students), with postgraduate programmes at master's and PhD levels the most popular programmes for enrolment. Nonetheless, the under-representation of students from the other seven ASEAN member countries was acute during the same period, with their combined enrolment totalling less than the number of Singaporean students in Malaysia alone (MoE, 2014).

The existing National Strategic Plan does not explore this. This position must change. Mobility between Malaysia and ASEAN member countries has been limited. The Southeast Asian region is one of the most economically progressive areas in the world. It is a region that has huge potential for the growth of Malaysia's higher education sector. ASEAN aims to transform itself into the ASEAN Community by 2015. Such transformation can increase human mobility and open up opportunities for education providers in the region.

The strategy of going regional in the pursuit of the internationalisation of Malaysia's higher education sector is slowly gaining wider attention from the government and higher education players. A series of high-level meetings between Malaysia and ASEAN officials have taken place. In the recruitment of international students, there has been considerable focus on potential students from Indonesia and Vietnam. Such interest is partly because of Malaysia's commitment to achieving the ASEAN Community agenda. At the ASEAN level, Malaysia has been a strong promoter of two important initiatives in higher education. First is the ASEAN Quality Assurance Framework in Higher Education. The objectives are to promote the regional harmonisation of practices in higher education and to encourage national QA systems to benchmark against the Framework. Second is the ASEAN Qualifications Reference Framework (QRF), intended to create a common reference point to enable comparisons of qualifications among ASEAN member countries. Such a move will eventually provide a more realistic solution to the varying levels of development, scope and sophistication of participating ASEAN countries' national qualification frameworks, creating a common framework for the region.

18.6. Europe in the context of internationalisation of Malaysian higher education

The European Commission supports a wide range of international education and capacity building activities in many parts of Asia including Malaysia. The co-operation has intensified since the establishment of European Union representation in Kuala Lumpur in 2003. Malaysia-European Union co-operation has focused more on education, especially higher education, than other socio-economic sectors. Although such co-operation is supposedly based on mutual interest, the European Union continues to dominate the various initiatives mooted by both countries. It is safe to argue that not all forms of co-operation have benefited Malaysia in an equal measure. This is understandable considering the unequal financial contribution by both parties. In dealing with European institutions, Malaysia has always acted as recipient.

The EU – Malaysia Strategy Paper 2002-2006 clearly stated that the focus was to "enhance the co-operation between European and Malaysian higher education institutions in view of the wider objective to strengthen relations, reciprocal understanding and knowledge between EU and Asia" (European Union, 2002, p.17). In order to translate this objective, two regional programmes have been introduced. First is Asia Link, an initiative funded by EuropeAid that supports a variety of higher education projects such as teaching and administrative reform. Second is AUNP that focused on enhanced dialogue between different stakeholders in the EU and ASEAN on issues of mutual interest.

In another Strategy Paper covering 2007 to 2013, there seems to be a new shift in the dimension of EU-Malaysia's higher education co-operation. The new position was "to enhance international co-operation capacity of universities in third countries by facilitating transfer of know-how and good practices in the field of student and academic staff mobility" (European Union, 2007). This reflects a strategy to encourage the movement of talent from Malaysia and Asia as a whole to Europe. To achieve this, a mobility scheme has been

introduced as part of the Erasmus Mundus programme to fund master's, doctoral and post-doctoral candidates pursuing higher degrees in Europe. The scheme also promotes academic staff exchanges for the purposes of teaching, practical training and research. Since 2004, 170 students have benefited from the programme (European Union, 2014).

In the area of research, co-operation is implemented under the EU funded Framework Programmes for Research and Technological Development (RTD). As of 2014, under the Seventh Framework Programme, 16 Malaysian institutions have participated in 29 projects with a total budget of EUR 180 million. Through these programmes, Malaysian institutions form part of the international consortium comprising EU and ASEAN institutions which undertake scientific and technological research co-operation in areas such as agriculture, biodiversity, health and other related disciplines. The total budget allocated to Malaysian participation is EUR 5.35 millon. 15 Malaysian scientists have also received Marie-Curie fellowships for scientific research (European Union, 2013).

Another initiative that promotes mutual understanding and co-operation in higher education between Europe and Malaysia is the MYEULINK project. The project is intended to promote understanding and awareness in Malaysia of the European Union and its multifaceted agendas. Part of the project includes the organisation of a series of high-level seminars that discuss the EU position on various issues such as environment, foreign policy and political security.

Malaysia, for its part, has very few internationalisation initiatives that engage Europe in a significant way. Although the country has a very strong relationship with higher education providers in the United Kingdom, the focus is only in the area of international student recruitment. Co-operation in research and other areas of higher education is very limited, small in scale and not sustainable. While Malaysia has also started to send students to other parts of Europe such as Germany, France and Eastern Europe, the numbers are small and primarily involve government-funded scholars.

However, Malaysia's active engagement in the Asia-Europe Meetings of Ministers of Education (ASEM) is an encouraging move towards enhancing greater co-operation with Europe. In May 2013, Malaysia hosted the Fourth ASEM in Kuala Lumpur. The Meeting reaffirmed partner countries' commitment to strengthening the Asia-Europe Education Process and to the development of the ASEM Education Area. Four areas of co-operation were identified for intensification and enhancement: quality assurance and mutual qualification recognition mechanism, engaging business and industry in education, balanced student mobility, and lifelong learning including technical and vocational education and training. Another successful initiative is the establishment of the Asia-Europe Institute at the University of Malaya. Established under the ASEM initiative, it is now a fully-fledged academic and research institute working in partnerships with other ASEM countries and almost totally funded by the Government of Malaysia. Since its inception, AEI is one of Southeast Asia's leading institutions that has dedicated itself to bridging the gap between Asia and Europe through academic and postgraduate studies.

Generally speaking, Malaysia's internationalisation agenda does not have a specific strategy for engaging Europe in a comprehensive manner. To date, all higher education policy documents have failed to mention any specific government initiative to partner with Europe in the pursuit of internationalisation. At the institutional level, very few Malaysian universities have any form of substantive cooperation with European institutions, except for a select few, which focus mainly on international student mobility. The relevant European institutions have initiated almost all past and ongoing initiatives, with acting purely as a

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recipient country. While the European initiatives reflect the seriousness of Europe's intention to provide leadership in the global knowledge economy, Malaysia's position has to change if it is serious about becoming an internationally recognised centre of learning and knowledge dissemination.

18.7. Institutional responses to internationalisation

Although HEIs have played a large part in the success of the Malaysian higher education internationalisation policy, there has been relatively limited empirical evidence to illustrate the ways in which HEIs have embarked on recruiting international students. Most marketing and recruitment exercises have been institution-specific, and there remains a lack of consolidated effort among HEIs to promote the Education Malaysia brand. Thus far, the task of promoting the brand has been left pretty much to the Ministry of Education's Department of Higher Education.

There is also little evidence to suggest that internationalisation has changed or influenced the practices of institutions in respect of the curriculum. Apart from the lack of evidence to suggest tangible influence, it is important to note that curriculum reform in Malaysia is a tedious and highly bureaucratic process. Curricular reform requires approval from the university Senate, and if the reform exceeds 30 %, approval is required from the Department of Higher Education. Consequently, bureaucracy may have been a hindrance to curricular reform and, in part, the reason for the apparent lack of influence of internationalisation on the shaping of curricula. In terms of teaching and learning, internationalisation has brought about an increase in the numbers of international academics in teaching. The significant increase in foreign lecturers, especially in private institutions, may be due to the influence of internationalisation and may be the result of academic mobility across international boundaries.

Arguably, the biggest influence internationalisation has had on the Malaysian HEIs has been on quality assurance and branding of academic programmes, especially in private institutions. Joint degree programmes, twinning programmes and franchise programmes have enabled students to pursue international degrees in local institutions, and this has been seen as a form of quality assurance. Private universities have also used these foreign degree programmes to cultivate an impression of higher quality and in this way to distinguish themselves from other Malaysian HEIs.

18.8. Challenges and opportunities for the future: bold policy initiatives required

This report focuses on the internationalisation of higher education in Malaysia. Malaysia's experience reflects global trends. Internationalisation is a complex process that will shape all aspects of the development of the Malaysian higher education system. Bold policy initiatives are needed to intensify this process. Malaysia must focus its resources on building its strength as a higher education exporter. Although the focus until now has been on international student recruitment, Malaysia needs to move into new frontiers, such as international research collaboration. Malaysia needs to do more to strengthen the Education Malaysia brand with a focus that stretches beyond promotion and recruitment. Malaysia must invest more in order to ensure that the internationalisation of higher education playsits crucial role in the country's continued economic competitiveness.

However, while internationalisation has been a major priority of national economic and higher education policies, this has not been reflected at regional level. The ASEAN Community 2015 may be the catalyst for more intensive interactions across and potentially

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beyond the region, but a number of challenges in terms of mutual qualification recognition and quality assurance continue to be a potential source of hindrance.

Apart from recruiting international students and using international partners and programmes as a form of quality assurance and branding, HEIs in Malaysia have not fully embraced an internationalisation strategy. In the development of public HEIs in particular, including polytechnics and community colleges, internationalisation has not played a central role. Nonetheless, public universities have been relatively active in recruiting international students and developing systems of collaboration and networking with foreign institutions, although they have not developed internationalisation policy as extensively as their private counterparts. Importantly, other areas of internationalisation, such as curricular reforms, pedagogical advancement, and academic staff and student mobility have also remained somewhat limited in the Malaysian context of higher education.

19.   SOUTH AFRICA

Nico Jooste

19.1. Introduction

This report presents an overview of the development, transformation and internationalisation of South African higher education. The South African higher education system can be best understood if described and discussed in its three historical phases of development. These phases were deeply influenced by its political history. The influences of one phase on the other were institutional and systemic and affected the form and intensity of the system's international engagement. Internationalisation of higher education was not practised in the orthodox manner during the earlier phases and is therefore described in a general, descriptive way. Internationalisation with its quantitative and other relevant indicators is described in more detail for the period 1994 to 2014.

19.2. Historical development of the South African higher education system

19.2.1. The period prior to 1948

The first phase can be described as the establishment phase. Higher education in South Africa was mainly shaped by the intellectual and academic influences of universities in the United Kingdom (UK) and the Netherlands. This was the direct consequence of the historical development of South African society under European control following the original occupation by the Dutch East India Company in 1652 and then from 1806 by the UK. Its first higher education institutions, established from 1874 to 1916 and representing the South African higher education system until 1948, were founded in line with similar institutions in Europe and the UK. The South African higher education system, however, did not develop as an extension of colonial government, as was the case for many other higher education institutions in Africa, but rather as a Eurocentric system that, during its establishment phase, mainly benefited the descendants of European and UK migration to South Africa. Due to its origins most of South Africa's early institutional development was strongly influenced by its international associations and, consequently, the system reflected its European educational lineage.

Although student mobility and internationalisation as such did not form part of the vocabulary during the early development of these universities, they were nonetheless international in character as the majority of the academic staff was either educated in Europe or had emigrated from Europe and the UK.

19.2.2.   The period 1948 to 1994

It was during the second phase of South Africa's higher education development that the apartheid policies of the State had a direct influence on higher education. The South African government was notorious the world over for these policies, which were legally adopted in 1948. The university system mirrored the ideals of apartheid, with universities being developed in line with the policy of ethnic and racial separation. The universities established during the first period became exclusively white, or in the case of the University of Fort Hare, exclusively black.

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A further consequence of the apartheid system was that non-white universities, in accordance with the Extension of Universities Act of 1959, were created for different racial groups, with ethnicity as the defining characteristic, and ten new universities were established from 1965 onwards, along strictly racial lines. Of these, eight were created to accommodate the non-white population. Although non-whites represented nearly ninety % of their population, these universities only provided them with limited higher education opportunities.

As much as ethnicity was one of the defining characteristics of the South African system, language was another, with Afrikaans and English established as the two official languages of South African universities. Historically, white universities were of two types: those with a distinct Afrikaner identity and those with an English identity, with Afrikaans or English as the respective medium of instruction.

The South African higher education system was further diversified through the establishment of a number of institutions focusing on vocational and technical education. Known as technikons, a total of 15 were created from the late 1970s onwards: seven for white students and seven for non-white students, plus one which offered only distance education. All the technikons were established during the apartheid era and were developed in line with racial ideologies. Most of these institutions saw their role as similar to that of the Universities of Applied Sciences which developed in Europe.

Specialist educational institutions were also created and operated independently from the HEIs. These were devoted mainly to teacher training, nursing and agricultural studies. Established to serve different racial groups, they were therefore regulated by different government departments set up to oversee the governance of the various racial groupings.

19.2.3. The period 1994 to 2014

The period from 1994 to 2014 can be defined as the period that witnessed the transformation of a once racially defined system into a multi-racial system fully integrated into the global higher education structure, with a strong focus on its European origins. The South African higher education system has been developed and transformed in a myriad of ways. Some notable changes include the development of a new landscape through mergers and incorporations of universities; changes in the demographics of students and staff; legislative changes; and the creation of a single system as well as State structures to enhance the efficiency of higher education.

19.3. General characteristics of the South African higher education system

The South African higher education system was, from its inception, governed within a legal framework determined at national level. Thus, the South African Higher Education Act, Act 101 of 1997, forms the basis of its regulatory framework. It grants HEIs the autonomy to govern themselves within the scope of the law and its provisions. One of the steering mechanisms of government is the funding regime introduced by the Higher Education Act. The regime stipulates that institutions are to be funded only in part through government subsidy and permits universities to supplement their income through student fees. Consequently, internationalisation per se is funded through this mechanism and the normal system of public funding.

19.3.1.   Mergers and incorporations of universities

A radical change in the higher education landscape in South Africa was introduced through a decrease in the number of HEIs from 36 to 23 as a result of the process of merging some institutions, and also through incorporations.

In 1994 HEIs fell into two distinct categories: traditional universities and technikons. The mergers and incorporations yielded three distinct types of universities in South Africa: traditional universities, universities of technology (formerly technikons) and comprehensive universities that offer a combination of degree and vocational diploma programmes.

More recently (2013), two new universities were established in provinces which have never had direct access to higher education, thus bringing the total number of universities in South Africa to 26: eleven traditional universities, six universities of technology and nine comprehensive universities, including the University of South Africa (UNISA), is a dedicated distance education institution.

19.3.2.   Changes in demographics of students

With the introduction of changes to South African society, traditionally white universities began to extend access to non-white students. Nonetheless, student demographics at universities were overwhelmingly in favour of white students when compared to the national demographics in 1996: the majority (89 %) of South Africans were black (African, coloured and Indian) and the remaining 11 % white (Higher Education South Africa, 2014).

Since 1994, thestudent profile and participation in higher education have changed significantly, with the student population doubling from about half a million (495 355) to approximately one million students (953 373).

The numbers of African and white students in 1994 were very similar (212 042 Africans and 221 829 Whites), but over the past 20 years there has been a threefold increase in the numbers of African students enrolled at HEIs (up from 212 042 to 662 066) and a concomitant decline in white students (down from 221 829 to 172 611). The normalisation of the South African system is further illustrated by the growth in recruitment of coloured and Indian students, the numbers of whom have almost doubled since the onset of democracy. Coloured enrolments increased from 27 474 to 58 674 while Indian enrolments increased from 34 010 to 52 281. Similarly, the democratisation of the South African political scene was accompanied by an influx of international students from 1994 onwards, as described later in this report.

There were only 224 230 women enrolled in higher education in 1994, compared to 271 125 men. Since then the situation has changed dramatically, with women in the majority: 554 840 women compared to only 398 367 men. From 2012 onward, women are in the majority for every racial group, and perhaps the most striking fact that in 2012 there were 389 285 African women enrolled in higher education compared to 272 636 African men.

Although these are impressive figures, there are still significant challenges with respect to non-white student access to higher education: in 2012 57 % of white students were admitted to HEIs, compared to 14 % of non-whites. This situation is a continuing source of pressure on the country and the education system.

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19.3.3. Changes in staff demographics

In 1994, white staff members were the dominant racial group in the higher education sector. They accounted for more than 50 % of staff (21 673 out of a total of 41 966) whereas Africans accounted for 32 % (13 720 out of 4,966). Since the implementation of the Employment Equity Act and the transformation goals set by both the Department of Education and institutions, staff demographics have changed significantly. In 2014, white staff represented 37 % and African staff 43 % of persons employed in the South African higher education sector. Hence, transformation is an ongoing process and the South African system is busy normalising and moving away from a system dominated by a minority (university staff according to ethnic group in 2014, adapted from information supplied by Mr. Charles Sheppard, 2014, Nelson Mandela Metropolitan University).

It is important to note that while the population of students in higher education has almost doubled in 20 years, the staff population has grown by only 15% (6 374) in that time. Nonetheless, some notable achievements include an increase in the African staff component to 43 % (20 893 out of a total of 48 340) and a corresponding decline in white staff to 36 %. Data is not available, however, regarding the number of foreign staff working in the South African higher education system.

The South African higher education system required radical change to move away from a y system that was racially defined and fragmented to a single but diverse system serving the whole population. In the process of change and transformation decisions had to be made with regard to system prioritisation. In this process policy development linked to the internationalisation of the higher education system was not the focus of government agenda. It was left to the HEIs, within the legal framework provided, to internationalise the system and its institutions.

19.4. International programmes and projects

19.4.1. Southern African programmes

South Africa, isolated from the African Continent for decades, recognised the importance of becoming involved in human resource development as well as participating in socio-economic and technological research that addresses the developmental challenges of the Southern African region. An important step towards its integration into the Southern African region was its ratification of the Southern African Development Community (SADC) Protocol in 2000. The Protocol envisaged a concerted effort to implement co-ordinated, comprehensive and integrated programmes of education and training, addressing the needs of the region.

The Protocol stipulates the following as far as higher education is concerned:

- Recommend that HEIs reserve at least 5 % of student admissions for students from SADC nations other than their own (up to a target maximum of 10 % overall).

- Work towards harmonisation, equivalence, and eventual standardisation of entrance requirements.

- Devise mechanisms for credit transfer.

- Encourage the harmonisation of academic years in order to facilitate student and staff mobility.

- Promote student and staff exchange programmes (Kamper, 2002).

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This protocol enabled South African Higher Education to confirm its relationship with, and its commitment to, the development of the region through its higher education activities. The effect of the implementation of the protocol on the South African system is clearly illustrated through student mobility and institutional co-operation between South Africa and the other member states. The outcomes of this collaboration are discussed in a later part of this paper.

19.4.2. European and other supranational programmes

The ongoing global political re-organisation in the post-Cold War period has also influenced collaboration at state level in the sphere of higher education. The movement from a unipolar to a multipolar world order has led to the creation of a number of South-South collaborations. The first of these for South Africa was the creation of the India, Brazil and South Africa (IBSA) Forum in 2003. Enhancing its co-operation in higher education it entered into a formal memorandum of understanding in 2007 '[…] to create conditions for cooperation between the IBSA countries' academic institutions, faculties, researchers and students through joint research projects in areas of mutual interest; to explore, investigate and develop new forms of South-South linkages in the field of education; to align the higher education systems; and to strengthen training and professional development' (IBSA, 2007). This collaboration works particularly well at government level. However, due to the lack of a national policy on the internationalisation of higher education, the activities do not play a major role in higher education co-operation and internationalisation at other levels. A similar, multi-national collaborative initiative was established in 2009 between the BRIC countries (Brazil, Russia, India and China) and South Africa. The BRICS co-operative arrangement initially operated primarily at the economic and political levels but with the establishment of the BRICS Academic Forum during the Durban meeting of the BRICS Countries in 2013, a new dimension was added to this supranational co-operative partnership. The initiative is still in the implementation phase, however. Clear goals were proposed in the formulation of a programme of collaboration, although most of the activities related to economic and social development and did not refer to specific collaboration between the HEIs (South African Department of Higher Education and Training, 2014).

The South African Government has also entered into collaborative agreements with the traditional North. One example is collaboration with the European Union to enhance student and staff mobility between South Africa and Europe within the framework of the Erasmus Mundus programme from 2009. The aim of the programme is to contribute to the provision of appropriate high-level skills for sustainable development and growth in South Africa, and to improve political, economic and cultural links between South Africa and the EU, by extending opportunities for the exchange of knowledge and skills between the South African and European higher education communities. The programme is coherent with the goal of development co-operation expressed in the Joint Country Strategy Paper (CSP) for 2007-2013, namely the alleviation of poverty and inequality in the context of sustainable development.

By promoting European academic exchanges, the programme generates mutual intellectual transfers and further increases the intellectual, human and academic links between Europe and South Africa. These activities contribute to a better understanding, progress in collaborative research and sustained mutual enrichment at a high level of intellectual sophistication.

The programme enhances the mobility of master's and PhD students as well as academic and professional staff. From 2014 it has also encouraged the mobility of post-graduate

students from Europe to South Africa. This is in addition to the numerous Erasmus Mundus partnerships that already exist between South African and European universities.

A five-year assessment of the impact of the programme should be undertaken, with particular emphasis on the degree to which it may contribute to the internationalisation of higher education, both in Europe and South Africa.

19.5. National policies for the internationalisation of higher education

19.5.1. Internationalisation of higher education during the period 1948 to 1994

The rejection of the South African apartheid system manifested itself not only in opposition to the system as expressed through international political activities but also through the cultural boycott against it. This was a planned strategy to bring an end to an unjust system. The strategy, which included the systematic isolation of South African HEIs from the international world, was a final attempt to force an end to the exclusion of the majority of South Africans from the world of higher education.

This episode in the history of South African higher education was aptly described by Colin Bundy in his paper 'A world of difference? Higher Education in the Global Era'. As an example of the exclusion of South African higher education he cited the following:

'South African academics were barred from attending the World Congress on Archaeology, in Southampton. The Southampton Congress and the furore it caused represented the high-water mark, visible, well-publicised episode in the attempts to boycott South African scholars and their institutions. Much harder to measure or describe were the invisible effects of the academic boycott. I don't suppose that we will ever know how many overseas scholars simply refused to come to South Africa during the high noon of apartheid; nor how many South African scholars were left off invitation lists or cold-shouldered when they attended international conferences. The brain-drain of South African academics over forty years of apartheid rule has never been accurately measured. And I am not sure that even now, South African universities fully realised how damaging was their partial exclusion from the global community of scholars' (Bundy, 2014).

There was no intentional internationalisation of the South African higher education system and its universities in the period from 1948 to 1994. Initiatives focused principally on specific disciplines, not on subscribing to the definitions and theories of internationalisation as practiced during the same period in both Europe and the USA. International mobility at that time was principally a matter of students and scholars leaving South Africa, due to its political system, to study and work outside the country.

19.5.2. Internationalisation in the post-1994 period

As a consequence, in pre-1994 South Africa, international co-operation in higher education was greatly restricted by the country's political and economic isolation. The re-definition of South African higher education after 1994 took place on a variety of fronts and was discussed by the National Commission on Higher Education (NCHE) and the white paper on higher education of 1997. Both maintained that South Africa needed to simultaneously address the nation's reconstruction and developmental needs as well as its positioning in order to respond to the challenges of globalisation. However '[...] neither the NCHE nor the white paper detailed a specific vision, or specific principles, goals or strategies for the internationalisation of higher education' (Council on Higher Education, 2004, p. 213).

The CHE in its advice to the Minister of Education, however, provided policy guidance that led to South Africa's specific stance on the General Agreement on Trade in Services (GATS) and Transnational Education. In its 2004 report on the first 10 years of democracy it stated that 'Globalisation and internationalisation are viewed as distinct concepts rather than as different sides of the same coin. Globalisation is one aspect of the context within which higher education operates, and which renders consideration of the international dimension of higher education important. However, internationalisation of higher education does not mean a blurring of the boundaries between state, market and higher education institutions (HEIs) – as globalisation does' (Council on Higher Education, 2004, p. 213).

The significance of this report is that it is the only time that a formal government body in South Africa has expressed its view on internationalisation. Indeed, it went further and defined internationalisation for South African circumstances by stating that '[...] internationalisation is closely linked to the fact that nation-states which have autonomous but interdependent higher education institutions, have a fair degree of control over who can provide higher education and what counts for higher education. It has essentially to do with the fact that international exchange students and staff, and international collaboration in the production of knowledge, are central to the life-world of the modern nation-state university' (Council on Higher Education, 2004, p. 213).

This is the only explicit pronouncement at government level providing any kind of indication or guidance in respect of internationalisation of higher education in South Africa. Its attention focused specifically on GATS and clearly formulated a South African higher education response, as indicated by the South African Minister of Education as follows: 'Education is surely not a commodity to be bought and sold. A reductionist view of education as merely an instrument for the transfer of skills should have no place in our world-view. Education must embrace the intellectual, cultural political and social development of individuals, institutions and the nation more broadly. We cannot sacrifice this 'public good' agenda to the vagaries of the market' (Asmal, 2003). It is clear that at government policy level South Africa disapproves of transnational higher education activities that are profit driven.

19.5.3. The role of the International Education Association of South Africa (IEASA)

Due to the lack of interest in internationalisation of higher education at governmental level, it was left to the South African HEIs themselves to develop the process. Through the efforts of the International Education Association of South Africa (IEASA) as well as individual institutions, the system and its institutions implemented internationalisation initiatives at institutional level. Without the leadership and organisational efforts of IEASA, since its establishment in 1997, the concept of the internationalisation of higher education would not now be implanted in most South African universities. A good example of a recent initiative by IEASA is the special interest group established during its annual conference (the Cape Town Conference) in 2012, to focus on internationalisation of the curriculum as a key ingredient of Internationalisation at Home (IaH). IEASA is currently fulfilling a crucial role in providing guidance to a system that lacks a national policy and strategy.

19.6. Internationalisation in practice since 1994

19.6.1. Double and joint degree policy development

Notwithstanding the lack of a national policy regarding internationalisation of higher education, pressure was brought to bear on the government to consider some of the latest

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trends influencing internationalisation and this ultimately led to the appointment of a governmental working group to develop a policy on international collaborative degree offerings. The working group investigated the offering of joint and double degrees globally with a view to providing the South African Government with recommendations to develop a regulatory framework for the offering of such qualifications. In preparing its guidelines the working group specifically recommended the internationalisation of the higher education system through the introduction of joint or double degrees. The working group submitted its report to the Department of Higher Education and Training in November 2014.

19.6.2. Visa regulations

Like elsewhere in the world, the development of study visa regulations has become an integral part of the landscape of internationalisation of higher education. Up to 1994, South Africa did not have clear guidelines that regulated student and scholar mobility. With the promulgation of the Immigration Amendment Act 19 of 2004, South Africa entered into a new study visa era. South African visa regulations were seen to be accommodating and not an obstacle to student and staff mobility. Notwithstanding, this Act was amended in May 2014, and much more stringent requirements were added in line with similar regulations governing student visas in Europe and the USA. It is clear that immigration regulations on a global scale are developed with national security imperatives in mind, and have nothing to do with the internationalisation of higher education. The current challenge is finding the appropriate balance for South Africa.

19.6.3. Institutional policies

In the absence of a national policy on internationalisation of higher education most South African universities include some form of internationalisation as part of their strategic planning. As part of the formal reporting system of South African public institutions, all universities are required to submit a formal strategic plan to the South African Department of Higher Education. An analysis of these plans confirms that internationalisation and the recognition of institutional connectedness to the global world play a part in university strategic development. A study of the 10 universities at which most of the international students are enrolled and which are considered to have more advanced internationalisation policies, reveals the following:

    a. Internationalisation is seen to be the major enabler for enhancing research and new knowledge creation.

    b. Comprehensive internationalisation would enhance the development of an Internationalisation at Home mindset that would encourage the development of global competencies in students. Outward mobility is out of reach for most students due to financial constraints and cannot, therefore, serve as the main instrument to promote internationalisation policy.

    c. Most universities have developed clear strategies to manage international students and have established the necessary infrastructure to manage the international activities of the institutions.

    d. Internationalisation is still seen as a luxury by more than 50 % of the institutions and, in consequence, internationalisation policy and the development of internationalisation initiatives take place unevenly.

    e. Internationalisation would assist in the improvement of the status of the institution and, correspondingly, in the improvement of its position in the world rankings.

It is evident from the analysis of the strategic plans of institutions that very few pay attention to 'supranational' policies in the development of their own strategies and plans. Institutional needs are foremost and are the drivers of policy. It is clear that due to the absence of a national strategy, institutional needs determine the strategies and not national or supranational needs. The main driving force behind participation in programmes like the Erasmus Mundus programme is the availability of funding, not strategies for the internationalisation of education.

19.7. A quantitative picture of internationalisation in South Africa: international students

The South African higher education system has accepted international students since its inception. The number of international students registering at South African universities, however, has increased dramatically since 1994. The number of international students grew from 7 031 contact students in 1994 to 40 213 contact students in 2013; this represents 7 % of the total student population. The percentage of international students to local students has remained constant since 2007. It is clear that as the South African system has grown the international student numbers have grown at the same rate. A further analysis of international student numbers indicates that 31.5 % of enrolments in 2013 were master's or PhD students. South African students registered for master's and PhD studies represent only 8.7 % of the total. Clearly, the South African system is very attractive to post-graduate international students and South African universities are keen to recruit them.

Another defining characteristic of international student mobility to South Africa is that the majority of these students are from the Southern African region. In 2011, 73.3 % of international students were from SADC countries, in 2012, 74.8 % and in 2013, 76.9 %. A further analysis of these numbers indicates that more than a third of those students were from Zimbabwe. Due to the political instability of that country and the struggling higher education sector, students migrate to South Africa to study. The SADC Protocol is hence playing a very important role in the promotion of internationalisation at a regional level in South Africa. It is also important to note that the majority of the students are self-funded and responsible for their own fees.

The South African higher education system contributes significantly to human resource development in the region since more than 75 % of its students/graduates originate from the region. Student-tracking studies also clearly indicate that the majority of these graduates return to their country of origin and do not stay in South Africa.

A recent survey on international students in South Africa shows that affordable fees, government subsidies for students from the region, proximity to home, cost of living, the reputation of its higher education and currency of its qualifications are pull factors attracting international, mainly African students, to the country. Obstacles indicated are accommodation difficulties, language, lack of funding opportunities, support and adjustment challenges, lack of South African friends and sometimes xenophobic attitudes towards African students (MacGregor, 2014).

The South African higher education system generates data needed for its funding regime. Due to the absence of a national policy on internationalisation the only data available to assess student and staff mobility, at national level, is that of international students studying in the system. Detailed data mining at institutional level needs to be implemented to produce data on outward mobility and numbers of international staff employed.

19.8. Conclusion: remarkable transformation, significant regionalisation, and a new national policy on the horizon

The foregoing broad brushstroke overview of the development, transformation and internationalisation of the South African higher education system describes typical challenges that a fledgling democracy would experience. Indeed, the challenge of reversing the ravages of apartheid is no mean feat. This, followed by massive structural changes, such as mergers and incorporations, has resulted in a system that has needed time to settle. It is to the credit of many individuals within the South African higher education system that internationalisation in higher education has developed despite the many other pressing matters at hand.

The internationalisation of the South African higher education system is a good example of a strong and excellent system serving as a natural attraction for students from a particular region. The South African system, however, is not only a regional player but, notwithstanding the absence of a national policy and financial support for internationalisation from central government, is engaged through its individual universities at a global level.

The role of IEASA in furthering the international agenda of the South African system should not be underestimated. It not only serves local and regional needs but is the local mouthpiece on the global stage. It participates in global debates about the future of the internationalisation of higher education whilst also providing leadership on a world stage where diplomacy and dialogue alone are not enough to bring about a better world.

Higher education internationalisation in South African HEIs is therefore in a continually growing and evolving situation, affected by its history as well as its current socio-political system. The challenges of a system operating without a clear strategy were identified as a critical shortcoming in the future development of the South African higher education system. The Department of Higher Education and Training has commissioned a team of researchers to produce guidelines for the development of a clear strategy to further guide the internationalisation of the South African system. This should be completed by the end of 2015.

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20. UNITED STATES OF AMERICA

John K. Hudzik

20.1. Introduction

This report identifies the characteristics and key issues facing higher education in the United States of America (US) as a foundation for a discussion of directions and patterns in its continuing internationalisation. Current challenges facing the system will help shape its internationalisation in the future. The report therefore provides an overview of current features and likely directions of US higher education internationalisation.

The internationalisation of US higher education institutions is significantly shaped by system and institutional attributes. The system is large, expensive, diverse, politically and institutionally decentralised, recognised as high quality especially at the graduate level, and under pressure relating to cost and documentable outcomes — particularly at the undergraduate level. Each of these attributes is important for understanding its strengths, weaknesses and dominant characteristics as well as pathways to internationalisation. Not all relevant attributes can be discussed in the limited space available. A few are singled out because of the substantial impact they have on the course of US higher education and its internationalisation.

20.2. The US higher education system: diversity and decentralisation

There are about 4 600 degree-granting accredited higher education institutions in the US.[62] Of those approximately 42 % grant only two-year or associate degrees, 17 % grant mainly baccalaureate degrees, 16 % master's and baccalaureate degrees, and slightly less than 7 % (around 300) are doctoral and research institutions. Nearly 20 % are special or narrow focus institutions. A little over one third of post-secondary institutions are private non-profit and a little more than one quarter are private for profit. In 2009-2010 there were roughly 21 000 000 students in the system.[63] There is significant mission diversity both across and within these classifications.[64] Master's and doctoral and research institutions are more likely

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[62] Data on institutions, enrolments and education attainment in US higher education have been compiled, amalgamated and reformatted from several sources (National Association of Independent Colleges and Universities - NAICU, 2014; USDE, 2014, 2013a, 2013b, 2013c, 2012a, 2012c, 2010; USCB 2012a). These various sources may be consulted for further detail and also for data on other dimensions of US higher education.

[63] (USDE, 2010) 40 % of the 21 million were enrolled in two-year associate degree institutions, 7 % in baccalaureate 4-year institutions averaging 1 700 students each, 22 % in master's institutions, and 28 % in doctoral and research institutions which have an average annual enrolment of 28 000. Total system enrolments increased by 32 % between 2001 and 2011. Baccalaureate enrolments have increased by 48 % since 1990, and post-baccalaureate enrolment by 57 % in the same period. Doctoral and research institutions are typically comprehensive, offering degrees at all levels and active across all missions: teaching, research and service. Over 3.2 million degrees are awarded annually, system-wide: 25 % associate degrees, 50 % bachelor's, 20 % master's, 2 % doctoral and 3 % first-time professional.

[64] The bachelor's degree institutions focus on undergraduate liberal arts and sciences as well as some professional fields. The doctoral, research and master's institutions offer a wide array of disciplinary and professional programmes. All institutions tend to contribute across key higher education mission areas — instruction, research and service — but differ widely in priorities assigned. Associate and baccalaureate institutions focus on instruction as well as growing community-service components with some faculties doing research. The associate degree institutions tend to be more technical/career-oriented but importantly they also provide the first two years of preparatory and general education for some students subsequently matriculating to four-year programmes.

than the other types to engage across all three higher education missions — teaching, research and service. They are also more likely to encompass the full range of subject matter but they vary substantially in how much priority is given to each. Baccalaureate and associate degree institutions vary amongst themselves in the emphases given to teaching, research and service but generally give priority to meeting teaching missions. This mission diversity is the result of several factors including differing institutional visions and missions, a decentralised higher education system, and independent institutional readings of markets and niche priorities.

There is no national system of higher education in the US because the US Constitution grants responsibility to the states for education (from primary to tertiary). The states vary substantially in how much control they exert over public institutions of higher education within their jurisdictions.[65] While education is principally funded through state/local appropriations and private funding (tuition and private gifts), the federal government provides scholarship aid, supports an extensive student loan programme, and is a principal source of research funds.[66]

With such funding the federal government exerts influence on higher education policies at the state and institutional levels, but does not exercise command and control. Federal influence can take a punitive course, by withholding funds if over-arching policy objectives are not met (e.g. non-discriminatory practices) but it rarely does so. The federal government, through the US Department of Education (USDE) and other departments, does attempt to encourage certain kinds of curricula and pedagogical practices through 'white papers' such as a recent one on internationalisation strategy (USDE, 2012b). However, it exerts influence more effectively by making grant funds available to encourage innovation, as has been the case for over 60 years with Title VI of the National Defense Education Act. NDEA funds language study and global area and regional studies (both instruction and research).

There is very little, if any, support for increased federal control, regulation or standards, either within the higher education community, from the general public, or politically, unless funding for innovation were to be provided without excessive requirements attached. The general distaste for a stronger homogenising federal role in higher education is consistent with the view among many senior administrators in US higher education that system strength emanates from its diversity and this viewpoint cascades to influence a diversity of approaches to internationalisation.

There is no governmentally prescribed national higher education curriculum but there are significant commonalities in practices throughout much of the system that can be attributed to custom as well as accreditation requirements: (1) eight semesters of full-time work for a baccalaureate degree; typically three to five semesters for a master's degree - some also requiring a thesis; PhD degrees typically require advanced course work (upwards of two years), comprehensive examinations and a dissertation; (2) a quarter of most undergraduate degree work is in liberal or general education. National disciplinary

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[65] Some states centralise significant aspects of planning, direction and control of individual public institutions under a state department of education or in a state-wide board of regents — e.g. the State University of New York system. Others — such as Michigan, yield substantial independence to individual institutions, going so far as to establish constitutionally independent boards of trustees or regents for each institution.

[66] Almost every federal department supports research, providing grants for example in Agriculture, Commerce, Defence, Energy, Education, Health and Human Services, to name a few. Among the largest, cumulatively providing billions of dollars annually, are the National Institutes of Health, the Department of Energy, the Department of Defense, and the National Endowment for the Humanities. Annually, the federal government provides student financial assistance in the amount of USD 250 billion and growing.

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associations and professional programme accreditation bodies serve to informally but effectively set expectations for core coursework and curricula in the various disciplinary and professional fields, rather than by way of government regulation. The principal mechanism of institutional quality control is through regional accreditation bodies — non-governmental private, non-profit organisations — and there is generally minimal government interference.[67]

20.3. The internationalisation of US higher education: an amalgam of interests, an array of approaches

It is within this framework of system decentralisation, diversity, accreditation and federal government influence rather than authoritative control that US higher education institutions engage in internationalisation. Internationalisation priorities are shaped by the higher education community, its disciplines and professions, the expectations of students, the public, the business community, and the carrot of federal funding.

Title VI of the National Defense and Education Act (NDEA), passed in 1958, has allocated billions of dollars in the decades since to build the nation's higher education capacity in language learning and in world area and regional studies. The word 'defense' in the Act reflects a long-standing predilection on the part of legislators and policy makers to justify funding for internationalisation on national defence and security grounds. Title VI has been a vital source of policy and financial support for internationalisation, although it was reduced in 2010-11 by nearly 40 %. Other key programmes to expand support include the longer-standing and substantial Fulbright and Fulbright-Hayes programmes. In 2013 general support for international education amounted to about USD 375 million from the Department of State and USD 75 million from the Department of Education. Smaller programmes exist in other government agencies to support international engagement such as in the Departments of Commerce and Agriculture. Importantly, the USD 250 billion federal student financial aid programme funds can be used for study abroad and the US Agency for International Development's budget of USD 1.58 billion (in the year 2012) provides international research and problem solving opportunities.

But even with the federal financial carrot, the details of institutional internationalisation are quite 'bottom up' (institutionally driven) and institutionally diverse. The diversity of institutional missions and priorities and growing importance of revenue diversification causes an increasingly market-driven and niche-strength priority setting by institutions, both overall and for internationalisation. The more recent interest on the part of many institutions to actively recruit international students is motivated by revenue generation possibilities but also to some extent by a desire to increase student and cultural diversity in the classroom and on the campus. Similar motivations shape cross-border research and grant-receiving partnerships.

Diversity is the rule in institutional international programming — connected to idiosyncratic institutional mission priorities, values, and constituencies. While on the surface there appear to be commonalities in international programming across institutions (e.g. widespread and widening interest in both outbound and incoming mobility, in

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[67] The Council for Higher Education Accreditation (CHEA) is a private, non-profit, national organisation that coordinates accreditation activity in the United States. CHEA represents more than 3 000 colleges and universities and 59 national, regional and specialised accreditation bodies; membership is voluntary. Accreditation is a powerful tool because without it, institutions and their students do not qualify for government funding and their degrees are not recognised across institutions, by licensing bodies, or by many employers.

internationalising the on-campus curriculum and in forming cross-border educational and research partnerships and collaborations), these play out differently across institutions, including across those of the same type. For example, some institutions focus curricular internationalisation on the core liberal and general education curriculum, others on curriculum in the majors, others on both.

In the area of mobility some emphasise longer-term experiences, others shorter term, and others active learning models (e.g. internships, community service and field research). While the number of US students seeking degrees abroad is growing, the numbers remain small. A large proportion of growth in outbound mobility has been in the shorter-term programmes, in part as a means to control study abroad costs, but also to accommodate the needs of more diverse majors incorporating an education abroad experience. In internationalising on-campus curricula, some institutions focus on the liberal arts component of the undergraduate degree, others on particular majors, and others involve majors throughout the institution. In research collaborations and partnership formation, some emphasise bilateral arrangements, others seek to build and join cross-border networks, and some seek to limit the number of cross-border collaborations in order to build a few wide and deep strategic institutional partnerships. Institutions differ widely in programming priorities assigned to various world regions. Some, in concert with their mission focus, emphasise international education opportunities in their international activity, others emphasise research and international development collaborations.

Nationally,[68] the number of incoming international students reached nearly 820 000 in 2012/13, a 7 % increase over the previous year and a 40 % increase over the previous 10 years, with the greatest growth from Asia (40 % now coming from China and India). Undergraduate students comprise 42 % of the international student total, graduate students 38 %, non-degree students 9 %, and students in practical training 11 %. Barring untoward or catastrophic global events, the consensus view is that these numbers will continue to grow substantially for at least a decade, although the US proportion of global mobility will continue to decline. Growth in raw numbers is fuelled in part by increased US higher education awareness of the intellectual and long-term relationship-building benefits of admitting and integrating international students into the campus living and learning environments. Revenue generation certainly plays a role as well. Growth may slow or decline as high quality education capacity is built globally over the next decade or two. Yet one can argue that there is room for growth in US international student enrolments given that they currently comprise only about 3.5 % of total degree-granting tertiary enrolments — much lower than, for example, the UK, nearing 20 % and Australia, over 20 %.

Study abroad or outbound mobility has also seen substantial institutional attention and growth over the last two decades and longer. In 2011-2012 over 280 000 students studied abroad, a 76 % increase over a decade. Few of these students were seeking degrees abroad. Growth flattened somewhat between 2007-08 and 2011-12, with the economic downturn assumed to have had a negative effect. While most study abroad students continue to go to Europe and the UK, a growing proportion study in other world regions. Strongly supportive rhetoric can be found among institutional leaders and policy makers on the importance of study abroad. These include recent, albeit unsuccessful, attempts to establish the multi-tens-of-millions of dollars Simon Study Abroad Fellowship Program, and

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[68]   Data come from two principal sources to provide an overview of the current state of affairs: (a) The Institute of International Education's 'Open Doors' annual report (IIE, 2013) and (b) The American Council on Education's (2012) survey of institutions and their internationalisation efforts, which looks more broadly at international education than data provided by 'Open Doors'. For detail on inbound and outbound mobility see the 'Open Doors' reports.

the Obama Administration's various '100 000'-strong study abroad initiatives to China, the Americas and India ('Passport to India') — all with strong rhetoric but little federal financial support.

Internationalising the on-campus curriculum (in both general/liberal education and in the majors) is also receiving growing attention and action, as is its integration with mobility. Major programmes by, for example, the American Council on Education (ACE), NAFSA, the Association of International Educators, and the Association of State Colleges and Universities (AASCU) and other Washington associations of higher education have, over the last decade or more, emphasised an integrated curricular approach to internationalisation, focused on mainstreaming access to internationalised curricula and learning. Several institutions in recent years have used their decennial re-accreditation process to showcase institutional goals and programmes towards internationalisation. Internationalisation has been a 'hot topic' at higher education conferences throughout the country. Several accreditation bodies for professional programmes (e.g. engineering and business) require responsiveness to integrating international learning components into curricula.

At an institutional level the most recent ACE survey titled 'Mapping Internationalisation on US Campuses' (2012) provides a picture of both progress and much yet to be done in internationalising US higher education. There are two caveats in reviewing the survey findings: (a) While roughly 3 700 institutions were surveyed, the response rates from different types of institutions were not consistent. 60 % of doctoral institutions responded, 44 % of master's, 27 % of bachelor's and 17 % of community colleges. It is likely that returns reflect an over-sampling of institutions that are more internationally engaged and an under-sampling of those that are not. (b) The survey focused attention on institutional education missions, and less on research and service missions. With these points in mind, summary findings include:

- 80 % of doctoral institutions, about two-thirds of both bachelor's and master's institutions and over a third of associate institutions refer to global or international education in their mission statements.

- 55 % of doctoral institutions (over a third of master's, over a quarter of bachelor's and about a fifth of associate institutions) have a separate institutional plan to address institution-wide internationalisation.

- Over 80 % of doctoral institutions, compared with 70 % of master's, two-thirds of bachelor's, and a third of associate institutions, say that global or international education (and/or another aspect of internationalisation) is among their institution's top five priorities.

- 80 % of doctoral institutions (roughly 70 % of bachelor's and master's, and approaching half of associate institutions) report having specified international or global learning outcomes at their institution.

- 90 % of doctoral institutions (77 % of master's, 67 % of bachelor's and 40 % of associate institutions) report active institutional initiatives to internationalise undergraduate curricula.

The survey also uncovered wider aspects of institutional internationalisation activity when it queried which aspects of internationalisation were receiving the most attention and resources. For example, two-thirds of doctoral institutions report being actively engaged in building research opportunities abroad for their faculty, as do half of baccalaureate institutions and a third of master's and associate-degree institutions. 80 % of doctoral,

60 % of master's, over half of baccalaureate and nearly half of associate-degree institutions are building strategic partnerships with institutions, governments and corporations abroad.

Overall, ACE (2012) concludes that, 'survey respondents perceive that internationalisation has accelerated on their campuses in recent years. The areas that reportedly have received the most attention and resources recently are: internationalisation of the curriculum at the home campus; strategic partnerships with overseas institutions, government or corporations; and expanding international student recruitment and staff.' Those responding that attention to internationalisation at their institutions has been high or at least moderate in recent years ranged from 95 % at doctoral institutions to 37 % at associate degree institutions. In sum, the ACE survey findings point towards reasonably widespread attention to and action promoting internationalisation at US institutions, and across institutional types.

Another international dimension of US higher education is the presence of foreign-born and foreign-educated faculty and visiting international scholars. There were about 28 000 full-time foreign-born faculty members in the US in 1969 (10 % of total faculty members); this grew to over 126 000 by 2007 – nearly 18 % of the total. They are found disproportionately at the doctoral and research institutions. With roughly a third of those on temporary visas staying in the US after earning doctoral degrees, these numbers and percentages are likely to rise until and unless global higher education capacity and opportunities grow substantially and disproportionately outside the US. Recently, international faculty members made up almost a third of all new faculty hires, particularly in the sciences and engineering. There were 122 000 visiting scholars from abroad in 2013, with over a quarter of these from China, and another quarter from India, South Korea, Germany, and Japan. Nearly 80 % were engaged primarily in research, with only about 8 % engaged mainly in teaching. 75 % were in the STEM disciplines, including 25 % in biological and bio-medical fields (IIE, 2013; Kim, Wolf-Wendel and Twombly, 2011).

20.4. Issues facing US higher education internationalisation: Outcomes, access, and cost

There have been several recent critiques of the US higher education system.[69] While some specifics in these critiques differ, there are common elements of concern and complaint: (1) high costs and failed cost control; (2) low degree-completion rates; (3) unemployment and underemployment of graduates; (4) failure to document learning and other outcomes. Most recently, public and political discussion has questioned the value of a college degree or, at minimum, that higher education is obligated to document its outcomes and impacts for both individuals and society. Accreditation bodies are now focusing a significant portion of regular re-accreditation on setting outcome and impact goals and documenting related achievements. These critiques and challenges pose difficult issues for higher education generally, and higher education internationalisation will not be able to hold itself above them and fail to be responsive.

Student demographics are changing, to which internationalisation also will need to be responsive. Non-traditional students (defined as those working while attending, with families, older, and/or attending part-time) are becoming the 'new normal' student at many institutions; this has implications for making mobility both accessible and affordable. In recent years, enrolment growth of students over the age of 25 exceeded that for those

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[69]   There are numerous and a still growing number of critiques. The ones noted here cover a wide array of contemporary system challenges and change (Arum and Roksa, 2011; Bok, 2009; Christensen and Eyring, 2011; Hudzik and Simon, 2012; Latinen, 2012; Miller, 2006).

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under 25. Racial enrolment diversity has improved over the last 35 years, as well as participation of minorities in study abroad. However, even with system enrolments growing, the annual number of degrees awarded being large, and with about 30 % of the population with bachelor's degrees or more, there is strong concern that such numbers are inadequate for a knowledge society in a 21st century global environment. Completion rates have been declining and vary greatly between students from the upper-half and lower-half income brackets. Access and completion are shaped by cost, and the costs of US higher education have been rising steadily above general inflation for decades. At the same time public disinvestment in per student appropriations, representing a shift away from seeing education as a public benefit and more as a private gain, has resulted in dramatically rising tuition rates and costs to consumers. To partially compensate, student grants, tax breaks and particularly loans have risen steadily, especially in the last few years, and have reduced the net tuition paid at public and private institutions by 60 % to 70 %. Radically rising student indebtedness on graduation because of loans has become a serious national concern. In 2012 70 % of graduating seniors had student loan debt averaging nearly USD 30 000 (The Institute for College Access and Success – TICAS, 2013). Cumulative national student loan debt is now USD 1.2 trillion — an amount large enough that, when coupled with prospects for loan default, creates ripples in the economy.[70]

These system challenges and changes will impose constraints of many kinds on how internationalisation of the system continues. Pressures will mount to: (a) control the costs of internationalisation; (b) provide access to mobility opportunities to a rapidly changing and diversifying student clientele; and (c) not increase student indebtedness or decrease completion rates as a result of adding new requirements to internationalise curricula and learning. The integration of international content and perspectives into existing courses and curricula will have to become a widely accepted strategy, especially as mainstreaming access to international content and experience spreads.

One question for a 'war weary' US society is whether isolationism will strengthen and negatively impact support for internationalisation, although this seems unlikely. A strong isolationist current has run through much of US society, culture and history, beginning with George Washington's admonition for the country to avoid 'entangling alliances.' Partly as a result, the internationalisation of higher education was at best spotty (Hudzik, 2011, 2015; de Wit and Merkx 2012) until world events — principally World War II and then the Cold War — forced greater attention and engagement internationally. Pressures for US higher education to internationalise have widened and deepened over the last sixty years as a

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[70]   Some additional detail on the issues raised in this paragraph include the following: On growing student diversity, between 1980 and 2012, system-wide Hispanic enrolments increased from 4 % to 14 % of total enrolments; blacks from 9 % to 15 %; Asian and Pacific Islanders from 2 % to 6 % and Native Americans to about 1 % (USDE, 2013b). Overall, enrolments are expected to continue to grow in the US system and to further diversify. Participation of minorities in education abroad has also increased. Regarding declining completion rates, the Obama Administration and many others decry the declining US global completion rankings in tertiary qualification (42 % ranked 12th globally) or in tertiary Type A (30 % ranked 8th globally) (OECD, 2010). They express desire to re-establish a US first-place rank. However, rates would have to improve to nearly 60 % in tertiary and 45 % in Type A - extraordinarily difficult goals to achieve given rising global competition and the Type A completion rate disparities within the US between those in the upper income brackets (a rate of about 58 %) and lower income brackets (12 %) (The Pell Institute, 2011). On matters of cost and affordability, comparing 1990 to 2013, the proportion of state resources going to support public higher education declined steadily, reaching about 45 %. Comparing 1983 to 2013, average tuition rates at four-year institutions after adjusting for inflation increased 331 %; at public two-year institutions 264 %; and at private four-year institutions 253 % (The College Board, 2013a). In 2013, total student aid was nearly USD 250 million (19 % federal grants, 41 % federal loans, and 30 % from state, institutional and private sources) (The College Board, 2013b). Middle class students, however, are squeezed the most (higher income students are less in need and lower income students are better supported by need-based scholarships and aid).

result of national defence and security concerns, beginning in the late 1950s (piqued by the Sputnik launch and resulting concerns that the US was dangerously ignorant about the rest of the world). Over time, advancing economic competitiveness has become an important motivation, strengthening since the early 1990s as a result of globalisation. Within the higher education community, interest has risen steadily in advancing cross-cultural understanding and learning.

US higher education and its internationalisation are increasingly affected by the rapidly expanding capacity globally in both instruction and research. Most of this growth is outside North America, Europe and the Antipodes. Asian R&D expenditure now exceeds slightly that of both Europe and the US (NSB 2010, 2014). Growth in instructional demand, followed by capacity, is projected to approach 150 % to 200 % between 2000 and 2025 or 2030, mostly in the 'developing' world (Ruby 2010). Two-thirds of the world's middle class is expected to be in Asia by 2030, with additional substantial increases in the size of the middle class in Africa and Latin America. The middle class has historically determined mass consumer expenditure behaviour and priorities, and is likely to do so in global higher education as well. Trade routes for mobility of ideas, learners and scholars are almost certain to diversify.

Some specifics of higher education change and reform being variously raised in the US could easily influence internationalisation there in the future. These include:

- Funding and accountability based on outcomes. Traditional models of funding have been weighted heavily towards institutional size (e.g. per capita student appropriations). There is growing discussion that accountability measurement will need to document outcomes such as in learning, enhanced skills and abilities, degree completion rates, employability and employer assessments of graduates, time and cost to degree, contributions to community and economic development and so forth. Funding would follow successful outcomes. The investment of time, energy and money in institutional internationalisation would be held accountable to similar expectations. Internationalisation outcome assessment is currently not well done and will likely become a serious shortcoming if not addressed.

- Degree completion rates and cost control. It is politically and economically problematic if internationalising the curriculum raises costs, increases time to degree or decreases completion rates. Yet, this is likely if increasing internationalisation means adding courses, degree requirements, or new institutional research thrusts on top of the existing ones. One solution is to move from 'add on' to 'integration' of international dimensions into existing courses and curricula and to connect existing institutional and faculty research expertise to that of colleagues in other countries. At the same time, integration will challenge the status quo, of course, as well as degree content, research agendas and partnerships, and established practices.

- Growing use of strategic cost/benefit analysis. At many, if not most, US institutions, new forms of strategic and financial management practices are emerging to put existing programmes, priorities and practices under a microscope of cost-efficiency and cost-effectiveness. A key issue for advocates of internationalisation is whether the benefits of internationalisation can be documented and can survive their full cost modelling.

- From international expertise for the few to cost-effective access for the many. The motivations propelling contemporary internationalisation require it to move towards widening access to all in the interest of producing educated graduates. How can internationalisation be mainstreamed (access democratised) in a cost-effective manner?

- Responding to non-traditional students. How will access to international content and mobility be facilitated for the widely diversifying student body, now increasingly a non-traditional student body?

- Broadening internationalisation beyond teaching and learning to other missions. With the 'globalisation' of nearly everything including information, learning, research capacity and the flow of problems and opportunities, internationalisation will be challenged to move beyond a curricular focus to encompass the research/scholarship and outreach/service missions of higher education. This will challenge internationalisation to be more holistic and synergistic across all three missions.

- Partnerships and collaborations. As a means of workload and cost sharing, as well as of gaining access to cutting edge knowledge where it is found, there will be greater attention to interinstitutional partnerships (domestic and international). This will be particularly true as envelope-pushing research and sources of cutting-edge knowledge disperse globally. There will be little choice for US higher education but to develop cross-border partnerships; the question is whether funding, bureaucratic models and federal trade and security regulations will develop to support them.

- Technology. Technology, particularly its use through the Web, has substantial potential benefits for use in internationalisation such as building real-time, virtual, cross-border classrooms, easing the flow and access of information and ideas across borders, widening global access to information in a near borderless environment, and facilitating research collaboration. The challenge will be to find how technology best supplements rather than replaces other forms of cross-border learning and experience.

- Global competition for the best faculty and students. While the US is likely to remain a preferred destination for some time, other options are developing globally and rapidly. The challenge for the US system is to move away from a 'build it and they will come' attitude toward actively attracting top scholars and students. This is where a sensibly reformed national immigration policy will be needed.

20.5. The future of US higher education internationalisation: innovation and tenacity required

Expansion of US higher education internationalisation in the coming decades is likely. However, general financial constraints in the federal budget for the foreseeable future make it difficult to imagine the emergence of significant new federal financial support. Other factors are, however, likely to continue pressing US higher education towards deeper and wider international engagement. The continuing development of high quality higher education research and instructional capacity throughout the world will increase competition and the need for collaboration. The expectations of the public, businesses and other higher education clientele to adequately prepare graduates for a global environment and economy will continue to foster further internationalisation. The size, diversity and relative independence of higher education institutions in the US will likely continue to encourage innovation, including further internationalisation. There is a long history of institutions independently responding to market threats and opportunities with creativity in developing access to markets along with niche strengths. Success, however, will be heavily dependent on higher education institutions adopting innovations that will promote internationalisation under the system constraints and challenges noted above, whilst at the same time avoiding burnout in the continuous push for innovation and internationalisation.

21. INTERNATIONALISATION OF HIGHER EDUCATION IN EUROPE: FUTURE DIRECTIONS

Hans de Wit, Fiona Hunter and Robert Coelen

This chapter brings together the results of the study 'Internationalisation of Higher Education', commissioned by the European Parliament (EP). The overall objective of this study was to scrutinise internationalisation strategies in higher education, with a particular focus on Europe. The study provides an overview of the main global and European trends and related strategies at the European, national and institutional level, but also of the underlying gist of what internationalisation is and should be aiming for, in the form of a scenario for its future.

In this chapter, we summarise the main findings from the study, and present conclusions and recommendations drawn from them. We also present the results of the Delphi Panel study, an expert-based method to gather the future perspectives of internationalisation of higher education for the European Union and its member states. This process resulted in a scenario on the future of internationalisation of higher education in Europe, and is best described as a desired scenario based on realistic assumptions about the future, as viewed by a collective group of experts in international higher education around the globe.

Internationalisation of higher education (IoHE) is a relatively new phenomenon but as a concept it is both broad and varied. In the first chapter, Understanding Internationalisation of Higher Education in the European Context, Hans de Wit and Fiona Hunter outlined the historical development of IoHE and how its concept and context have changed over the years, in particular from the end of the Cold War onwards, stimulated to a large extent by the initiatives of the European Commission as of the mid-1980s. The European programmes for research and education, in particular the ERASMUS programme, were the motor for an increased and more strategic approach to internationalisation in higher education. This is similar to the role played by the Fulbright programme in the US after the Second World War, but on a much larger scale and with a greater impact on higher education, personal development of students and staff and employability. The focus was on cooperation and led to rapid development of intra-European exchange of students and academic staff, joint curriculum development and research cooperation in the last decade of the 20th century.

The United Kingdom was the exception to that rule with a model of active recruitment of international students and then cross-border delivery of education: mobility of programmes, projects and institutions, as could also be noted in other English-speaking countries.

Over the past 25 years, the international dimensions of higher education have further evolved. They are influenced by the globalisation of our economies and societies and the increased importance of knowledge. As described in the first chapter, internationalisation is driven by a dynamic and constantly evolving combination of political, economic, socio-cultural and academic rationales. These motives take on different forms and dimensions in the different regions and countries, and in the different institutions and their programmes. There is not one model that fits all. Regional and national differences are varied and constantly evolving and the same is true within the institutions themselves.

Therefore, it is important to emphasise that a study on the internationalisation of higher education must take into account a broad range of diverse factors. It has to identify and analyse the global, regional, national and institutional commonalities and differences in the development of internationalisation if it is to understand, influence and support the process of internationalisation in higher education. The seventeen country reports illustrate this diversity in both national and institutional policies. However, common goals and objectives can also be observed, such as the increased importance of reputation (often symbolised by rankings), visibility and competitiveness; the competition for talented students and scholars; short-term and/or long-term economic gains; demographic considerations; and the focus on employability and social engagement.

The country reports from the emerging and developing economies illustrate that IoHE is itself becoming globalised as it is increasingly considered a high-level priority in all world regions, and new models and approaches emerge in nations and institutions as a means to position themselves beyond their own borders. What are some of the key observations that can be made from the seventeen country reports? Are there noticeable differences between the European context and other parts of the world that emerge from this picture? Are there any similarities between the seven non-European countries and the BRIC countries, not selected for this report? A short analysis of the main trends in national policies for internationalisation around the world, with a separate box on the BRIC countries and other emerging economies, is provided.

Box 1:   Higher Education and internationalisation in BRIC countries and other emerging economies

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Higher Education and internationalisation in BRIC countries and other emerging economies

In our selection of seventeen countries, the BRIC countries: Brazil, Russia, India and China, were not included. As these countries are considered relevant economic and political players, it makes sense to take a brief look at them. One should note, however, that little cooperation has been developed so far in the area of higher education among the BRIC countries, and that there are substantial differences between them. As Altbach and Bassett (2014) state: 'In vitally relevant respects, the four BRIC nations differ greatly from each other across the spectrum of higher education measurement norms. The four come from different academic traditions (although with some similarities between China and Russia), use different languages, have employed quite different academic strategies, and have no history of academic cooperation or competition. Neither students nor professors from these countries engage in regular or systematic exchanges or partnerships.'

They also note that while China and Russia strive to become top players in the league tables, this is not the case for Brazil and India. If one looks at the BRICS and Emerging Economies Rankings 2015 of Times Higher Education (THE), in the top ten, four institutions are Chinese, one is Russian, one South African, one from Brazil and none is from India. If we look at the top 100, all four countries are well represented with China being the dominant player (more than a quarter of all places), India with eleven, Russia with seven, South Africa with five, and Brazil with three, compared to Turkey with eight (Times Higher Education, 2015). The increased presence in these league tables of China, Russia and also Turkey is certainly noteworthy.

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While China and India are major sending countries in terms of international students, this is not the case for Brazil and Russia. Brazil has a strong private higher education sector, unlike the other three countries. So, differences are greater than similarities, although according to Altbach and Bassett (2014) some common realities can also be identified: internal governance tends to be highly bureaucratic; the academic profession is facing significant challenges in salaries, prestige and quality; with the exception of Russia, their systems are rapidly expanding with problems of equity and access; and their potential of becoming significant players on the academic world stage cannot be denied. In conclusion, Altbach and Bassett (2014) state: 'We question, then, the utility and validity of talking about the BRICs in understanding the competitive realities of global higher education'.

At the same time, it is undeniable that due to the sheer size of these higher education systems, the relatively rapid economic development of these nations and their relatively young populations (in comparison to Europe for example), they act as magnets for the higher education systems and countries in Europe and elsewhere. Furthermore, this shared experience of being seen as important partner countries by others is one reason for their increased collaboration.

The education ministers from the BRICS (including South Africa) are seeking to coordinate and implement collaboration in higher education. In November 2013, they met in Paris at UNESCO to set an agenda focused on two issues: managing expansion of higher education in their countries, and increasing BRICS collaboration and mobility. They also addressed the issue of support to other developing countries as a point of action (UNESCO, 2013). It remains to be seen if these intentions will lead to concrete action, especially given the recent political and economic challenges, and it might be prudent to consider the expansion and improvement of higher education in emerging economies other than the BRICS. Increasingly, countries such as Chile, Indonesia, Korea, Mexico, Nigeria, Poland, and Turkey can also be considered important new global economic and political players.

21.1. Key trends in higher education strategies for internationalisation

Below we provide an overview of the 10 key developments for Europe and the rest of the world emerging from the seventeen country reports and the literature review.

1. Growing importance of internationalisation at all levels
   Overall, there is a clear trend towards more internationalisation of higher education, one that covers a broader range of activities and is more strategic in its approach. Its importance is growing everywhere as a response to the challenges that universities and countries face. All reports call for greater effort towards internationalisation in the belief that it can make a difference and bring about necessary change.

   There is a trend towards more national strategies for internationalisation. Governments begin to see it as part of a bigger strategy to position their country, improve economic standing, reinvigorate the higher education system or bring about necessary change. There is a clear trend away from an ad hoc to a more systematic approach, both at national and institutional level, and where it is happening to a lesser degree or at a reduced speed, this is perceived as a weakness.

When internationalisation of higher education is linked to national ambitions, and is part of a broader policy or strategy for national growth and/or influence, it is generally well supported (which can also mean the removal of obstacles and barriers) and well funded. These initiatives are directed not only at the HEIs themselves, but at promoting the national higher education system globally.

The context, the challenges and opportunities, as well as related rationales and approaches differ, in particular in emerging and developing economies and societies. Within Europe, there are still substantial differences between North and South, East and West.

2. **Effects on institutional strategies for internationalisation**

There is a clear trend towards a policy cascade from the national to the institutional level, and in Europe this starts at regional level. However, even when national strategies are not yet in place, HEIs are developing their own responses. However, when national strategies for internationalisation use the same targets and performance-based indicators across the system, this can lead to a homogenisation of institutional strategies, as institutions tend to adhere closely to national guidelines rather than develop their own agendas.

Moreover, when indicators are being used, they tend to focus on quantitative rather than qualitative results, which puts pressure on the institutions to focus on increasing numbers rather than looking at the outcomes of internationalisation in terms of enhancement of education, research and service.

In many countries, governments and HEIs are still struggling to find a balance between autonomy and accountability, and this is reflected in internationalisation as it takes on greater importance in the higher education agenda. This creates particularly strong challenges in Central and Eastern Europe, as well as in emerging and developing economies.

3. **Insufficient funding**

Funding remains a challenge, but there are a number of countries and institutions which are in the fortunate position of being well-supported in their internationalisation efforts by their national governments, or in the case of Europe, by the European Union. However, some Central and Eastern European countries and institutions are strongly reliant on funding from the European programmes (including structural funds) and do not have any substantial investment in internationalisation from their own national and institutional resources.

The level of importance attached to internationalisation impacts on the range of funding mechanisms available and stakeholders involved. These can include a variety of public bodies that provide funding such as government agencies, regions and cities, but investment can also come from private stakeholders such as businesses and foundations.

In the emerging and developing economies, there is still a tendency to depend on external international development funds for internationalisation in the absence of regional, national or institutional investments.

4. **Increasing privatisation**

The trend towards privatisation of higher education is apparent in internationalisation. Internationalisation is increasingly seen as a means to replace

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shrinking public funds through revenue generation from international students and thus contributes to a privatisation of higher education. The need to generate income is a general trend, and even in well-supported systems, universities are being encouraged to develop new income streams through commercial activities. Although this is more apparent in some regions than others, there are increasing trends towards privatisation in continental Europe, and in particular in Central and Eastern Europe.

5. Effects of globalisation
   All higher education systems are dealing with the competitive pressures of globalisation, the pace of (unexpected) change it is generating and the expectations that are being placed on its institutions to make a key contribution to national development in terms of employable graduates and transferable knowledge. However, while all countries had different starting points, the same trends are apparent everywhere, and there is increasing global convergence in aspirations, if not yet in actions.

   In Europe, ERASMUS and the Bologna Process opened up opportunities, but countries in Central and Eastern Europe had to struggle with the upheaval of the post-communist period and many of the challenges are still there. In other regions, emerging countries are still consolidating their national higher education systems, and South Africa has had to deal with the consequences of the former apartheid system. This creates significant challenges in how to co-operate and compete on an equal footing with the developed world.

6. Growing competition
   There is an evident shift from (only) cooperation to (also) competition: from an almost exclusive focus on co-operation and exchange to a broader understanding of internationalisation that includes the race for talent, international student recruitment, strategic partnerships, income generation, rankings and institutional positioning. In Europe, we see three main approaches: internationalisation as soft power with long-term economic goals, evident in Scandinavian countries and in Germany, those with a stronger focus on shorter-term economic goals, such as the United Kingdom, and others such as the Netherlands and France that lie somewhere in-between. However, demographic decline and shrinking national funding mean that increasing numbers of HEIs are shifting their focus to short-term economic gain.

   Beyond Europe, this trend is even more manifest, although in the competition for talent, rankings and positioning there are substantive risks, such as brain drain and dependency in developing countries. The successes and failures of internationalisation are linked to the strengths and weaknesses of the national higher education system, which is, in turn, embedded in the economic, political and social development of each country.

7. Growing regionalisation
   There is an evident trend towards regionalisation, often taking inspiration from the European model. European influence in other regions is also apparent but to varying degrees. This often depends on the EU programmes and level of funding made available, but there has also been careful attention paid to how European models (mobility programmes under Erasmus+, TEMPUS, ECTS, Tuning, Diploma

Supplement and so on) might be adapted to enhance internationalisation in other countries and regions.

Asia emerges increasingly as a region of focus, both within the region itself and for other countries and institutions, including Europe. Asian, African and Latin American countries are increasingly looking to develop special relations with their neighbours and facilitate interaction through the development of shared systems and procedures. In identifying target regions, countries and institutions focus not only on emerging clusters such as BRICS, but also on CIVETS (Colombia, Indonesia, Vietnam, Egypt, Turkey and South Africa) and CLMV (Cambodia, Laos, Myanmar and Vietnam).

8. Rising numbers

The numbers are still rising everywhere. The increase may be fast or slow, large or small, but the numbers for all international activities and, in particular, student mobility whether credit- or degree-seeking, show a clear upward trend, and more countries are becoming involved. Moreover, major sending countries of degree-seeking students are increasingly becoming receiving countries as well.

However, in developing countries there is imbalance between outgoing and incoming students and scholars, resulting in brain drain and decreasing quality and reputation. There is also concern in Central and Eastern Europe about the imbalance in both credit and degree mobility with more outgoing than incoming students, and this is further exacerbated by the challenges of demographic decline and a shrinking student population.

Increasing numbers have led to a debate on quantity versus quality in a number of countries. Internationalisation exposes and magnifies institutional weaknesses, and as international student numbers rise, along with the subsequent impact on funding and/or reputation, some countries and institutions are turning their attention and efforts to improving the quality of the student experience. Development of strong quality assurance mechanisms for internationalisation is increasingly perceived as key to providing a high level of education and service to students and in creating transparent institutional standards for all aspects of internationalisation.

9. Insufficient data

Despite the increasing requirements to produce evidence of impact, there is often the perception that there are still insufficient data about internationalisation to carry out accurate analysis and comparison and inform decision making. In Europe, data on European programmes and European mobility trends are collected regularly, and studies on their impact and outcomes are made freely available. While some countries have sophisticated tools for data collection, others produce only limited information on international activities. Beyond data collection, there is a need for more impact studies that can demonstrate outcomes of internationalisation. The level and usefulness of data on internationalisation is clearly linked to the importance attached to IoHE as a component in broader national policies.

10. New areas of development

There is much discussion about internationalisation of the curriculum (and of learning outcomes) and the need to pay greater attention to developing an international dimension for all students, not just the mobile minority. In some

countries, the question has not yet been addressed as a strategic priority, while in others it is understood as teaching in another language, predominantly English, or offering joint and/or double programmes. Such programmes are clearly growing in number and importance in many countries as a key tool for internationalisation, despite the many legal, financial and quality assurance constraints that still prevail.

While less widely discussed, there is also a clear growth of transnational education with a range of different models developing out of the opportunities offered to different national systems from their historical ties, languages offered or the presence of diaspora. While this has traditionally been a sector for English-speaking countries, a number of European and non-English speaking countries elsewhere are now entering the field. Host countries are often interested in opening up their system to foreign providers as a means to cope with higher education demand and/or to accelerate the pace of reform.

On the other hand, digital learning and in particular MOOCs have been at the centre of many higher education debates, and yet the question can be asked whether HEIs seek to develop digital learning as part of their internationalisation strategy. Despite its high profile, there is very little sign of any significant activity in the development of digital learning in the countries surveyed, even those with high levels of technological development. As the chapter on this topic illustrates, digital learning is still in its early stages, especially in Europe, and is likely to enter higher education in a range of different and often blended forms of teaching and learning.

These ten points are the main highlights of trends in internationalisation of higher education emerging from the seventeen country reports and the literature. It would be possible to identify more, but we have concentrated on those we consider to be most relevant. They establish the foundation for our conclusions and recommendations and for the scenario on the future of internationalisation of higher education in Europe.

In Europe, it is apparent that the internationalisation process began with ERASMUS. The programme created common understandings and drivers for internationalisation in most countries, and this was further reinforced by the Bologna Process. Internationalisation is now becoming mainstreamed at the national and institutional level in most countries of the world, and in particular in Europe. The rhetoric speaks of more comprehensive and strategic policies for internationalisation, but in reality there is still a long way to go in most cases. Even in Europe, seen around the world as a best practice case for internationalisation, there is still much to be done, and there is uneven accomplishment across the different countries, with significant challenges in Southern and, in particular, Central and Eastern Europe.

The Bologna experts in Europe, in preparation for the 2015 meeting of the ministers of education of the Bologna Process member countries, stressed that more emphasis should be placed on internationalisation as an essential part of higher education and the Bologna Process. They highlighted the need to increase international study programmes, to develop new teaching and learning methods, and to focus on quality assurance and diploma recognition on an international scale, as well as fostering stronger ties between higher education and science (Latvian Presidency of the Council of the European Union, 2015).

21.2. The future of internationalisation of higher education in Europe: commonalities and differences in perceptions emerging from three surveys

We have provided an overview of trends and issues with respect to internationalisation of higher education at the national and institutional level in Europe and elsewhere. While common trends have been identified, significant differences in approaches and strategies remain. The two surveys from IAU and EAIE, respectively, as summarised and analysed in Chapter 2 of this study, provide an insight into the perceptions of institutional leaders in Europe and the rest of the world (IAU) and of international education practitioners in Europe (EAIE) with respect to the benefits, risks, obstacles and priorities of IoHE.

Experts in international higher education from around the world, based on a Delphi exercise, have identified a scenario for the future of internationalisation of higher education in Europe, which can be best described as a desired scenario based on realistic assumptions.[71]

The views emerging from the Delphi Panel on the current and future state of internationalisation of higher education coincide to a large extent with the results of the two surveys. As presented in chapter 2, both studies show that European institutions and the people who work in them:

- perceive the key benefits and reasons for pursuing internationalisation as the improvement of the quality of teaching and learning and preparing students to live and work in a globalised world;

- view regional/national level policy as a key external driver and influencer of institutional policy on internationalisation;

- note that increasing international (and especially outbound) student mobility is a key policy focus in institutional internationalisation policies;

- report that as well as international student mobility, international research collaboration and international strategic partnerships are given priority among the internationalisation activities undertaken by European institutions.

The combined results of the two studies draw a highly encouraging picture of internationalisation in Europe. Moreover, the IAU survey showed that Europe is the region most often prioritised in institutional internationalisation activities in other parts of the world. What these surveys do not show, however, is how this picture might evolve in the future, or if technological and socio-cultural innovations are likely to change the trajectory of internationalisation within Europe once again. This was precisely the focus of the Delphi Panel method, which looked at the decade ahead. Looking at the two surveys and the Delphi Panel outcomes, there is coherence between the views on the current state of internationalisation and what the future direction of European internationalisation might be.

Based on three rounds of input in the Delphi study, a possible (desired) future scenario for internationalisation of higher education in Europe was formulated by the participating experts and is presented in Box 2.

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[71] For a detailed description of the methodology, process and results of the Delphi Method see the annex to this report.

Box 2:   A scenario for the future of internationalisation of higher education in Europe

A scenario for the future of internationalisation of higher education in Europe

IoHE will be seen increasingly as a response and input to the on-going globalisation of our economies and societies and the importance of knowledge in that process. IoHE will be driven by a combination of economic, political, academic, social and cultural rationales in response to the call for greater competitiveness, graduate employability, global engagement, knowledge exchange, and income generation. Where in the past IoHE was driven primarily by higher education stakeholders, other public and private stakeholders will be increasingly engaged with and influencing its development.

The academic response will continue to focus on enhancing internationalisation through mobility and cross-border delivery, but importantly also through the wider curriculum (and learning outcomes) at home with the aim of educating global citizens and professionals, but also as a means to enhance the institutional profile, attract and develop talent and ensure financial sustainability. Partnerships and alliances with higher education stakeholders and other public and private entities, both at home and abroad, will become an important means to achieve these goals.

A key approach to the enhancement of IoHE will be through further development of the curriculum and learning outcomes. Elements of curricular change will include enhanced intercultural competences and global perspectives through better defined internationalised learning outcomes, better use of the increased diversity in the classroom, and stronger language acquisition. The abroad component of IoHE, expressed mainly through mobility of students, staff, and programmes, will continue to be a key pillar of IoHE, increasingly connected to and integrated in the internationalisation of the curriculum and learning outcomes for all students and staff.

These developments will align with the following definition of an internationalised curriculum as developed by Leask (2015): 'Internationalisation of the curriculum is the incorporation of international, intercultural and/or global dimensions into the content of the curriculum as well as the learning outcomes, assessment tasks, teaching methods and support services of a program of study.' They will also align with internationalisation at home (IaH) as defined by Beelen and Jones (2015): 'The purposeful integration of international and intercultural dimensions into the formal and informal curriculum for all students within domestic learning environments.'

Therefore, Jane Knight's definition of IoHE could be expanded to: 'the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society.'

The current and globally recognised investment in IoHE by the European Commission, which manifests itself primarily in support of mobility and partnerships, will be extended into the arena of curriculum development, and such developments will include joint degrees, blended learning, international work placements and internationalised learning outcomes for all students. The nexus between funding for IoHE and research by the European Commission should not be underestimated. There is ample evidence that international collaboration in research leads to better output. The combination of funding for the development of international partnerships and for collaborative research will produce a synergistic effect.

For this scenario to become reality, barriers for the further development of internationalisation in higher education will need to be reduced: funding (lack of funding, increased dependence on short-term external funding sources and an exaggerated focus on revenue generation, national bureaucratic obstacles, disharmony of funding models for higher education in Europe); language (both the insufficient provision of foreign language learning and the dominance of English as the language for education and research); an overly heavy focus on the mobility side of internationalisation programming, accessible only to a small elite and not integrated into the curriculum for all students; along with teaching and learning, lack of engagement of and rewards for faculty and staff, and lack of integration of institutional, national and supranational policies.

On the other hand, IoHE can be enabled by technological opportunities for virtual exchange and blended learning (including enhanced international student interactivity), further development of joint and double degrees, greater integration of study abroad and work placements options, better mutual recognition of credits and degrees, enhancement of qualitative indicators for quality assurance and classification systems, greater commitment to equal partnerships, stronger fostering of public-private initiatives and more alignment between education and research policies and with other levels of education (primary, secondary, vocational and adult).

If the barriers were removed and the enabling forces activated, Europe would experience enhanced employability of its graduates, with a better appreciation of internationalisation by both employers and society. International mobility would become better organised for both staff and students and better integrated into the curriculum. Surplus funds from tuition fee income from non-EU citizens and from other sources might be used to provide greater equity of access for talented but disadvantaged students, although increased global competition for those talents is a challenge. These students would enter a higher education system that is better connected throughout Europe due to the removal of national regulations blocking greater integration and/or greater harmonisation of regulations of the different countries moving into the European Higher Education Area (EHEA). As the fourth IAU Global Survey on Internationalisation of Higher Education (Egron-Polak and Hudson, 2014) shows, most higher education leadership is committed to internationalisation (61 % in Europe), but an even stronger commitment to support IoHE is required. In turn, academic staff would be better informed about, and engaged with, IoHE and would be better equipped to design and deliver innovative programmes.

The outcome will be a European higher education system that is capable of producing global citizens and professionals who are respectful and appreciative of other cultures, and able to contribute to the development of knowledge economies and socially inclusive societies. Europe and its educated global citizens will be in a better position to address world issues such as poverty, sustainable environments, and violence. Such a Europe will be better prepared not only to compete, but also to cooperate, with the rest of the world, including the emerging regions as they develop their own models of IoHE.

This scenario captures the most salient features of the desirable direction of IoHE development for Europe, and can be seen as a point of reference for the European, national and institutional levels of higher education in the European Union and Bologna Process member countries. It reflects the main trends described above, although we have to be cautious of this optimistic view of the benefits of internationalisation because these are constantly challenged by the growing pressures for short-term economic gains faced by European countries and institutions, as a result of both financial and demographic factors.

21.3. Conclusions and recommendations

In this comprehensive study on the concept, context, trends and national policies for internationalisation in Europe and beyond, we have brought together information, analyses, and data from a broad range of sources. We can conclude that over the past 35 years, since the first initiatives for joint study development in Europe, the internationalisation of higher education has evolved and broadened substantially, in reaction to the further unification of Europe, the globalisation of our economies and societies, and increasing importance of knowledge in these processes. What are the main conclusions we can draw with respect to the initial research questions?

1) How can 'internationalisation' be understood in the context of higher education, and what strategies are being pursued globally in this regard?

The study has revisited Jane Knight's commonly accepted working definition for internationalisation as 'the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society.'

This definition reflects the increased awareness that internationalisation has to become more inclusive and less elitist. The 'abroad' component (mobility) needs to be seen as an integral part of the internationalised curriculum to ensure internationalisation for all. It re-emphasises that internationalisation is not a goal in itself, but a means to enhance quality, and that it should not focus solely on economic rationales.

The previous chapters indicate that there are some common features in internationalisation strategies developed at regional, national and institutional levels. The most important features focus on visibility and reputation combined with increased competitiveness; competition for talented students and scholars; a divide in strategy between short-term economic gains or long-term economic development and soft power, or a mixture of short and long-term objectives; increased strategic partnership development; more attention to employability and/or social engagement. Demographic factors (increased unmet demand in some parts of the world and oversupply in other parts of the world) influence strategic choices. Imbalances in credit and degree mobility as well as differences in funding and the public/private nature of higher education are other important factors that have an impact on the chosen direction. Although lip service is paid to the need for global citizenship development, solidarity, ethics and values still have limited impact on strategy development.

2) In how far and by which means are the European Union and its Member States responding to the challenges of internationalisation?

Most national strategies, in Europe as well as elsewhere, are still predominantly focused on mobility, short-term and/or long-term economic gains, recruitment and/or training of talented students and scholars and international reputation and visibility. This implies that far greater efforts are still needed to incorporate these approaches into more comprehensive strategies, in which internationalisation of the curriculum and learning outcomes as a means to enhance the quality of education and research receive more attention. The inclusion of 'internationalisation at home' as a third pillar in the internationalisation strategy of the European Commission, 'European Higher Education in the World', as well as in several national strategies, is a good starting point, but it will

require more concrete actions at the European, national, and in particular, the institutional level for it to become reality. The development by the European Consortium for Accreditation (ECA) of a 'Certificate for Quality in Internationalisation' (CeQuInt) (ECA, n.d.) is a positive example of an instrument that assists institutions and programmes in enhancing the quality of their international dimensions.

3) What are the perspectives of future development, and which recommendations can be made both for policy makers and higher education institutions?

The Delphi study scenario gives a strong message on the desired future development of internationalisation in Europe. Some additional conclusions in relation to that scenario can be made:

- There is increased competition from emerging economies and developing countries, but also opportunities for more collaboration as they become stronger players in the field of higher education.

- There is a shift from recruitment of international students for short-term economic gain to recruitment of talented international students and scholars, in particular in the STEM fields, to meet needs in academia and industry, needs caused by demographic trends, insufficient local student participation in these fields, and the increased demands of the knowledge economy.

- Funding of higher education, tuition fees and scholarship schemes are diverse and result in different strategies, but also generate a range of obstacles for mobility and cooperation. Greater transparency and the removal of these and other obstacles are needed to increase opportunities for mobility and cooperation.

- Joint degrees are recognised as important for the future of internationalisation of higher education in Europe and beyond, though many barriers still need to be overcome and it must be acknowledged that such degrees have to be built on mutual trust and cooperation, which require time to develop in order to guarantee sustainability.

- There is increased awareness of the need for more higher education and industry collaboration in the context of mobility of students and staff, building on the increased attention given to work placements in Erasmus+.

- Greater recognition is being given to the important role of academic and administrative staff in the further development of IoHE. Academics, whose contribution over the past 25 years has been reduced in the increased centralisation of European programme administration, are now understood to play a crucial role in the internationalisation of education and research and need to be given additional support.

- Notwithstanding the accomplishment made in the Bologna Process for further transparency, there are still substantial differences in higher education systems, procedures and funding between European countries which influence the way internationalisation evolves in these countries and how cooperation can be increased.

- There are also still substantial imbalances in both credit and degree mobility as well as staff mobility between different countries. This is particularly evident in Central and Eastern Europe, where there is both mobility imbalance and declining higher education enrolments. This requires attention from national governments but also at European level, as it could lead to an increased divide in higher education in the region.

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In addition to the four main research questions, a number of more specific issues have been examined in the study, in line with the terms of the tender document. From our study, we come to the following conclusions and recommendations on these issues:

1) To which extent can digital learning and virtual mobility replace traditional forms of student and staff mobility?

As chapter 3 on digital learning states, within Europe the digital discourse has frequently referred to the potential of virtual mobility to realise the vision of European integration. To the extent that it enables access to higher education for new student constituencies who would otherwise be excluded, the digital revolution is a good thing. To the extent that it institutionalises two-tier higher education systems globally, it is less desirable. It may have both of these impacts simultaneously. The study also states that with some notable exceptions, Europe is still playing catch-up in the digital revolution, but it is well-placed to be in the vanguard of new thinking on how the digital revolution can improve both quality and access to higher education. It is thus necessary to give increased attention to digital and blended learning as an instrument to complement the internationalisation of higher education, not only through MOOCs but also through Virtual Exchange and Collaborative Online International Learning.[72]

2) Are there potential conflict areas between internationalisation on the one hand, and other priorities of higher education policies (quality of teaching and research, funding, curricular reform, etc.) on the other?

As has been clearly stated and argued throughout the previous chapters, IoHE can be a powerful instrument for enhancing the quality of teaching and learning; a way to focus on curricular reform and bring about genuine innovation. It is not a stand-alone policy, but rather should be an integral part of the overall institutional change process. If viewed in this way, it cannot be a competing or conflicting priority, but rather a powerful enabler and enhancer of higher education.

Based on that, we provide the following recommendations on the internationalisation of higher education for all policy levels:

1. There is a need, in an environment of increased dominance of English as the language of communication in research and education, to stimulate bilingual and multilingual learning at the primary and secondary education level as a basis for a language policy based on diversity in European higher education.

2. There is also a need to better align IoHE with internationalisation at other levels of education (primary, secondary, vocational and adult education), building on their inclusion in Erasmus+. The earlier children are embedded in an intercultural and international environment, in their private life and at school, the more likely they are to continue to be interculturally and internationally stimulated and active. Internationalisation cannot be restricted to higher education, and linking experiences, activities, networks and choices can enhance the international dimension at all levels.

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[72] See also the observations on MOOCs in the report 'Ten technologies that could change our lives, potential impacts and policy implications', a study by Lieve van Woensel and Geoff Archer of the Scientific Foresight Unit (STOA) of the European Parliamentary Research Service (EPRS) for the European Parliament, January 2015, pp. 7-9 (retrievable from
http://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS_IDA%282015%29527417).

3. Given that the possibilities for work placements under ERASMUS+ is leading to stronger growth in credit mobility for work placements than study, there is a need for greater attention to be given to the importance of work placements in internationalisation of higher education, as well as for options to combine language and culture skills training, study abroad and work placements. The current organisation within ERASMUS+ still makes that difficult as they are organised as separate activities.

4. The importance of 'Internationalisation at Home', defined as 'the purposeful integration of international and intercultural dimensions into the formal and informal curriculum for all students within domestic learning environments' (Beelen and Jones 2015), needs to be recognised at all levels and more attention should be paid to international and intercultural learning outcomes as important elements in the curriculum.

5. There is a need to break down the barrier between internationalisation of research and education, at the European, the national and the institutional level, to enhance opportunities. Greater synergy will lead to a win-win situation for both, where currently they appear to limit each other, as also expressed by the Bologna experts in their recommendations to the ministers of education of the Bologna Process member countries (Latvian Presidency of the Council of the European Union, 2015).

3) How far do current internationalisation strategies potentially compromise academic values and principles?

In the focus on growing competitiveness, increased self-funding and graduate employability, the important role of higher education in social engagement and in the development of global and European citizenship for students and staff must not be lost or forgotten.

Given that internationalisation has become increasingly driven by economic rationales and an 'international education industry' has emerged, there is a clear danger that academic values and principles are at risk. Higher education as a public good, and in the public interest, is not necessarily in conflict with increased entrepreneurship and private ownership, but it is important to ensure that the internationalisation process acts in line with the values and principles as described in the IAU declaration Affirming Academic Values in Internationalisation of Higher Education, A Call for Action (IAU, 2012).

Those same values underpin the International Student Mobility Charter, adopted in September 2012 by the European Association for International Education (EAIE) and the International Education Association of Australia (IEAA), in association with other like-minded associations around the world, and need to be addressed and integrated into actions at all levels.

4) Should national governments and/or the European Union play a more active role in the development, supervision and coordination of national/European internationalisation policies?

The importance of the role of the European Union and the Bologna Process in the development of IoHE, in Europe but also around the globe is undeniable and should be built on even further. In this process, however, it is essential to focus on partnerships and collaboration that recognise and respect the differences in contexts, needs, goals, partner

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interests and prevailing economic and cultural conditions. Europe can only be an example if it is willing to acknowledge that it can also learn from elsewhere; it offers an important model but not the only one for the modernisation of higher education. In this context, the Nelson Mandela Bay Global Dialogue Declaration on the Future of Internationalisation of Higher Education, signed in Port Elizabeth, South Africa, on 17 January 2014 by nine national, six regional and nine other organisations from around the world, is also relevant. The Dialogue participants agreed that the future agenda for internationalisation should give priority to the following three integrated areas of development:

1. Enhancing the quality and diversity in programmes involving the mobility of students and academic and administrative staff;

2. Increasing focus on the internationalisation of the curriculum and of related learning outcomes;

3. Gaining commitment on a global basis to equal and ethical higher education partnerships.

The increased number of strategies at European, national and institutional level aimed at enhancing IoHE is a new and positive phenomenon. Alignment with the European Union strategy, as described in 'European Higher Education in the World', as well as with the Bologna Process objectives and goals, is important. The original intentions of greater transparency and coordination of these two regional processes are still very relevant, as there are still substantial differences and challenges within the European higher education sector.

In this process, it will be important to give more space to the emerging role of local governments and industry in the development of IoHE, in recognising the importance of internationalisation for the local community in fostering greater understanding and dialogue among people of different cultural and ethnic backgrounds, and for the private sector through talent development and recruitment, research and innovation.

In summing up, we can say that the future of IoHE in Europe looks potentially bright, but its further positive development and impact will only materialise if the various stakeholders and participants maintain an open dialogue about rationales, benefits, means, opportunities and obstacles in this ongoing process of change. As mentioned in the opening chapter, internationalisation is also challenged by increasingly profound social, economic and cultural issues, such as the financial crisis, demographic decline, immigration and ethnic and religious tensions. While it is true that these challenges could impact negatively on further internationalisation, they also raise awareness of its importance in developing a meaningful response.

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