



**Research project report 05/06:
Responding to the internationalisation agenda: implications for
institutional strategy**

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Section 1: Background & Methodology

1. Project Background

- 1.1. The project is one of ten one-year projects funded by the Higher Education Academy (HEA) research programme. The programme aims to inform higher education policy and practice and contribute to debate on improving students' learning experiences. This project focuses on two of the Academy's key research themes: "The use of institutional research to enhance students' learning experiences in higher education" and "The implications of greater international competition on institutions" (i.e. the overseas student market and internationalisation of the curriculum).
- 1.2. The project was conceived in order to investigate the impact of three factors that are becoming increasingly important to the international educational activities of UK higher education institutions (HEIs).
- 1.3. Firstly, the global higher education (HE) context has become increasingly dynamic in recent years. This is reflected in changing patterns of international student recruitment, such as the maturity or decline in traditional overseas markets, efforts to develop new markets and increased competition nationally and internationally for the recruitment of overseas students. Related developments include a diversification of delivery modes in response to the changing needs, expectations and demands of students with new provision emerging (e.g. 'borderless' and cross-border education). New types of providers (e.g. international consortia, for-profit universities) in the overseas education market are also part of this dynamic picture.
- 1.4. Secondly, this changing context has had an impact at policy level in the UK. There are concerns about threats to the competitiveness of UK HE, loss of market share, and associated potential for loss of fee income. UK policy agencies are developing international strategy documents that encourage the HE sector to develop a more strategic approach to their international activities in order to maintain their international influence. Various activities are encouraged including diversifying delivery modes; 'internationalising' curricula; improving the quality of the student experience and intensifying international linkages and collaboration.
- 1.5. Thirdly, higher education institutions are responding to this changing environment. There is a noticeable shift towards increased co-ordination of international activity within institutions in the form of the development of 'international strategies' and administrative restructuring of international activity; attempts to review the internationally relevant content of curricula and moves to improve the overseas student experience and support for international students.
- 1.6. This project began in August 2005 and ran until September 2006; it is intended to be a pilot for further research.

a) Research approach

- 1.7. The project's overall methodological approach was guided by the relatively small project budget, and the intention for the research to act as a pilot project. The chosen approach combined desk research with more detailed empirical investigation in one UK higher education institution, via an in-depth institutional case study. The specific aims and objectives of the project are summarised below and are addressed in Sections 2 to 6 of the report.

b) Project Aims

- 1.8. The project had three aims, which were:
 1. To investigate the specific and general implications of greater international competition and growing internationalisation of higher education on the strategies and practice of one university that has a strong international emphasis.

2. To develop an institution-wide research methodology as an investigative tool that will illuminate the ways in which one university is currently serving its overseas' students, and how this service could improve in the future.
3. To identify data, information and a robust methodological tool of use to other institutions and policy agencies in the context of greater international competition and internationalisation in higher education.

c) Project Objectives

1.9. To achieve the aims described above, the project was framed by seven objectives, which were:

1. To review research literature, policy reports and other relevant documentary sources to provide information on trends in international higher education.
2. To review research literature, policy reports and other relevant documentary sources to provide information on strategic responses to trends in international higher education at the national level.
3. To review research literature, institutional publications and other relevant documentary sources to provide information on the strategic and structural approaches used by UK higher education institutions related to their international activities.
4. To review research literature and other relevant documentary sources to provide information on the experiences of overseas' students at the institutional and national levels.
5. To conduct interviews with key UK policy agencies related to their international or internationalisation strategies to provide policy context at the national level.
6. To use the findings from the background research to develop and pilot a case study methodology using interviews and documentary analysis to investigate one higher education institution's approach to internationalisation.
7. To reflect on the experience of using the case study methodology and to make observations on its potential for use in other institutions.

d) Outcomes

1.10. The project was designed to produce outcomes of use both to the case study institution and the wider higher education sector.

1.11. For the case study institution, the documentary analysis, development and use of the institutional research tool and the findings associated with the use of the tool were intended to help the institution in two main ways. Firstly, the institutional research process was designed to strengthen the international strategy and to raise awareness and debate in the institution about the international dimensions of the curriculum. Secondly, the research sought to identify opportunities to enhance the experience of international students studying on the university's programmes.

1.12. The project also sought to assist other higher education institutions and researchers in the UK HE sector (and internationally) through developing a piloted and replicable institutional and cross-institutional research methodology that builds on and adapts existing models for use with (and by) other institutions. The project also sought to produce institutional data that might be used in a relevant benchmarking exercise at a later stage (with the agreement of participating institutions). The wider research remit aimed to provide detail on relevant policy issues and documentation, and identify key agencies, networks and associations connected to the 'internationalisation' agenda as a resource for researchers and practitioners. The research findings are intended to contribute to the growing field of research on internationalisation in higher education, institutional strategy development and overseas students' experiences.

1.13. Finally, the project sought to assist UK policy agencies and government departments to identify the policy implications of greater international competition and the strategic implications for institutions so that funding streams, agency support and guidance could be appropriately and effectively targeted.

2. Methodology

2.1. The methodology included the following broad elements:

- Development and piloting of an institutional research tool to produce a case study of a single institution's strategy and practice as it relates to internationalisation.
- Further development of work initiated by the Leadership Foundation for Higher Education (LFHE) (Koutsantoni 2006a) that examined institutional strategies and approaches to internationalisation in the UK and beyond.
- A small-scale desk-based study commissioned from the Observatory on Borderless Higher Education (OBHE) to examine a sample of national strategies for internationalisation and institutions' responses to them.
- Examination of documentary evidence and interviews to investigate the international stance and approach of relevant national agencies and government departments in the UK, alongside a wider search of academic literature.

2.2. Sections 2 to 6 of this report describe and reflect on the findings from each of these elements although, for reasons of institutional confidentiality, information about the case study institution gained from piloting the institutional research tool is not discussed directly or specifically in this report.

a) Institutional case study

i) Overview

2.3. A key project objective was to develop and pilot a cross-institutional research methodology that incorporated an investigative institutional research or 'audit tool' that could be replicated in higher education institutions, either for self-assessment, or for comparative purposes (e.g. benchmarking) to enhance and develop the quality of their international strategy, international activities, support services and the overall study experience of international (and UK) students.

2.4. The project team chose the case study method as it is ideal for understanding the relationship between data and context, and for theory-building, and offered the best opportunity to gain a detailed understanding of the key issues within the budgetary and time constraints of the project.

2.5. The case-study was designed to help the project team undertake a functional analysis of one university's response to the international context in terms of its strategy and practice, in particular the relationship between institutional policy on internationalisation and its practical impact on the ground amongst staff and students. The case study sought to investigate a number of issues including the institution's organisational structure related to international activity, the coherence of international strategy development and implementation, and the experiences of students and staff related to the international dimensions of international activity.

2.6. The case study approach had the following three elements, which are described in more detail in the sections which follow:

- Identifying, collecting and analysing relevant institutional data and information from within the case study institution.
- Interviewing key staff at central and academic unit level in relation to how 'internationalisation' strategies and policies operate in practice.
- Investigating the experiences of overseas students in the institution via interviews, group discussions and analysis of the findings of previous internal research.

2.7. The approach was based on an adaptation of an existing internationalisation research tool, the International Quality Review Process (IQRP) developed by the OECD (1999) and was informed by the Commonwealth Universities Study Abroad Consortium (CUSAC) Internationalisation Benchmarking Process developed by the Association of Commonwealth Universities (ACU) (ACU,

2002). A key output from the research was a refined version of this tool, based on experience of using it in practice and its ability to help collect the information required. A detailed description of the two earlier tools, and their adaptation by the project team, is provided in Appendix 1.

ii) Documentary research

- 2.8. The project team began the case study by assembling and reviewing key institutional documentation and data. The intention was to generate an institutional map of international activity, to help the project team to understand the character and culture of the institution related to internationalisation issues, and to investigate the development and implementation process of the international strategy. This process was also expected to help the project team to contextualise their findings and to assist with their interpretation.
- 2.9. The information collected included: information on relevant responsibilities and activities from the institution's web site; details of internal policies and procedures related to international activity (e.g. organisational structures, policy and strategy documents, information about relevant systems and processes); relevant committee papers and minutes; internal reports and studies on international students (e.g. market research reports and research on the student experience); internal planning/Registry data (e.g. relating to trends in overseas' student and staff recruitment) and benchmarking data. More detail about the information collected is provided in the description of the audit tool in Appendix 1.
- 2.10. This process also helped the researchers to identify key institutional contacts, service and academic departments, and units with responsibility and expertise in international activities for further investigation in the interview phase.

iii) Qualitative interviews

- 2.11. The project team supplemented the documentary data collection with 34 in-depth face-to-face semi-structured interviews over a period of 6 months.
- 2.12. The interviews were undertaken either with individuals or in pairs (where a team was involved) across the institution. The scope of the interviews was originally planned to focus only on student-facing services (academic and support domains) and student representatives, but was subsequently widened to include any departments that might be affected, involved or have an impact on international activity and international strategy (e.g. professional service units).
- 2.13. Two researchers undertook the interviews together, ensuring substantial coverage of issues that arose in situ. The interviews lasted between 1 and 1 ½ hours, and were recorded for transcription purposes, following consent from the respondent(s). Interviews were coded and analysed individually by members of the research team before being jointly reviewed.
- 2.14. Each interviewee was asked in writing to participate in the project, and if they agreed they were provided with a two-page outline containing the project objectives, and a summary of the interview structure to enable them to prepare for the interview and to collect any relevant information before the interview. In this document the project team also explained the potential benefits of the project for the institution as a whole, students and staff, the research process, and how the data would be managed, analysed and the results disseminated. All respondents were assured that all of their responses would be treated as confidential, unless explicitly agreed otherwise.
- 2.15. A generic version of the interview structure is provided in Appendix 1, although slightly different interview guides were developed for respondents in different parts of the institution according to the particular responsibilities, knowledge, expertise and interests of the respondent (e.g. senior managers; staff in service departments; academic representatives; and student representatives).

Interview Themes

- 2.16. The interviews were semi-structured using a thematic interview guide based on the adapted 'audit tool'. The interviews were designed to investigate respondents' own activities and relationships related to the international dimension at the case study institution, reflecting their areas of responsibility and expertise. The interview structure included general themes such as range of international activity, organisational structures and linking mechanisms across units and departments, and questions focused on specific experience and expertise of departments and units. The interviews were also designed to elicit respondents' perspectives on the nature, implementation and impact of the international strategy at the central university level as well as other issues related to the international context in which the institution operates (e.g. increased competition in the overseas' market, immigration issues, etc.).
- 2.17. Overall, the interviews were designed to cover the links between strategy, practice and experience and to include both descriptive information and perceptions and views of respondents.
- 2.18. An outline of the general thematic areas covered by the interviews is provided below, and more detail about the audit tool is provided in Appendix 1.
- Description of 'the function' and key activities
 - Resources & support
 - Profiles of staff or students
 - Knowledge Management approaches & mechanisms
 - Strategy (institutional and local)
 - Marketing activities (internal and external)
 - Organisation structures
 - International curricula & pedagogical issues
 - Reporting lines
 - Academic integration (learning styles, support)
 - Communication channels (formal & informal)
 - Cultural integration (staff and students)
 - Formal & informal relationships
 - Conceptions of 'internationalisation'
 - Internal linkages across departments & units
 - Assessment of existing strategies, structures and approaches
 - External links
 - Quality enhancement

Interview Sampling

- 2.19. A purposive sampling method was used to select respondents, and interviewees were chosen based on their potential knowledge and expertise relevant to the project. The research team identified staff that represented broad functional responsibilities (e.g. teaching, professional services, senior management) and also specific responsibilities related to international students (e.g. the international officer, admissions tutors, student services manager). The student perspective was investigated via interviews with students from representative groups (e.g. the Student Union and International Societies). The interview coverage of departments, groups and units in the institution is shown in the list below.
- Senior Management Team
 - Research & Knowledge Transfer

- Teaching & Learning
- Library & Information Services
- International Partnerships
- Marketing
- International Office
- Academic Schools (x8)
- Student Care Services
- Alumni & Development
- Traded Services (e.g. catering, accommodation)
- Students' Union (including international societies)
- Human Resources
- Language Centre
- Registry & Quality Assurance
- Student Recruitment (including international)
- Finance Department
- Planning Department

2.20. It would have been valuable to undertake more interviews with representatives from other parts of the institution, to gain alternative perspectives and additional data. However, the project resources were limited, and so the number and comprehensiveness of interviews was carefully controlled.

b) Desk research

2.21. The desk research was designed to collect and review evidence that would be able to support or challenge two key hypotheses, namely:

- That international competition is increasing in higher education;
- That higher education is becoming more internationalised (with impacts on national and institutional policy, institutional administration, academic activities, quality assurance, and international students' study experiences).

2.22. The desk research phase had four elements: an investigation of the UK institutional context related to international higher education; an investigation of the UK policy context related to international higher education; an investigation of the international policy context related to international higher education; and a brief review of academic and other literature related to 'internationalisation', international strategy development at institutional and curriculum levels, and overseas' students' experiences. It is important to note that the literature on the internationalisation of the curriculum and the experiences of international students was not investigated in detail since this area is the subject of a literature review and analysis of current practice being undertaken by researchers at the University of Salford on behalf of the Higher Education Academy.

2.23. The project team believed that the policy, institutional and research contexts were crucial in understanding the development and content of international strategies in the UK, and the rationale for institutions' international activities. The desk research was also intended to produce a 'map' of the key issues and topics related to internationalisation in the UK and to identify the key researchers, organisations and institutions in the field of international higher education.

2.24. The sources of information that were used to collect this contextual information were diverse, and included:

- Conference Papers (HEA, UKCOSA: The Council for International Education, British Council)
- Guardian/Times Higher Education Supplement (THES)/jobs.ac.uk job advertisements
- Institutional statistics guides
- International strategies (Agencies) – e.g. Universities UK (UUK), Higher Education Funding Councils
- International strategies (National) – e.g. Department for Education and Skills (DfES), Scottish Executive
- Policy reports/briefing notes (e.g. OBHE, British Council)
- Press articles – THES, Guardian, Economist, OBHE etc.
- Quality Assurance Agency (QAA) Quality Audit and Collaborative Audit Reports
- Quantitative data on international students (e.g. from the Higher Education Statistics Agency (HESA))
- Research reports
- Survey reports (e.g. student experience, staff mobility)
- Research/Journal Articles

2.25. In addition, other types of publicly available 'grey' literature were also reviewed to gain an understanding of institutional approaches to their international activities and the strategic approaches or models currently in use. This literature was identified based on guidance from project contacts, and leads from meetings with policy organisations. Examples of such literature included:

- Minutes and papers from organisational committee meetings/workshops
- Institutional strategy documentation (e.g. from strategic plans)
- Internal reports (e.g. annual reports)
- Research outlines
- Notes from seminars/meetings
- Internal/institutional research project reports
- Conference presentations

2.26. The review of the wider UK institutional context built on work initiated by the Leadership Foundation for Higher Education (Koutsantoni 2006a, op cit.) that examined institutional strategies and strategic and operational responses to internationalisation in the UK and beyond. It was also based on detailed information acquired through a range of institutional contacts where related work was in progress. The findings from this part of the research are discussed in detail in Section 5 of this report.

2.27. The review of the UK policy context was also assisted and supplemented by a number of interviews undertaken by the project team with representatives from a sample of UK policy agencies. A detailed discussion of the UK policy context is provided in Section 4 and extracts from policy documents are presented in Appendix 2.

2.28. The Observatory on Borderless Higher Education (OBHE) was commissioned by the project team to undertake a comparative analysis of current national policy level approaches to international strategy and internationalisation outside the UK. A summary of these findings is provided in Section 4. The OBHE provides an environmental scanning service on borderless developments in higher education and has expertise in e-learning, private and corporate education, developing markets, transnational education and international collaboration.

2.29. The literature review focused primarily on UK research and other academic literature, although relevant international literature was also considered when appropriate to the UK context. The bodies of literature that the project team investigated in the review are listed below:

Key literature:

- Internationalisation
- International strategy development
- International students' experience/support

Related literature:

- Internationalising the curriculum
- Cultural diversity and widening participation in HE
- International perspective in staff development
- Wider student experience/support
- International marketing/recruitment
- Institutional strategising in HE

Secondary literature:

- Organisational structure/design
- Strategy
- Implementation (management/leadership)

c) External Interviews

2.30. In parallel to the case study, as part of the secondary data collection process, a small number of interviews were also conducted with experts on internationalisation to contextualise the research and to help validate the findings. In addition, the activities of a range of policy agencies were also profiled by the project team. These policy interviews and profiles informed the policy context section of this report (Section 4).

2.31. There are a number of agencies and organisations, both in the UK and internationally that have an interest in international higher education. These include policy agencies, representative organisations and membership organisations. The project team identified these agencies and categorised them as first and second order contacts, based on their areas of responsibility and expertise. These agencies could be described as stakeholders for the project, since the project directly related to, and could be of value to their activities.

2.32. The organisations identified as first order contacts were contacted via email and telephone and asked if they were willing to be interviewed.

2.33. The second order contacts were profiled based on publicly available information about their activities. A full list of the organisations contacted and profiled, together with an analysis of the information collected is contained in Section 4 of this report.

2.34. The project team provided all interviewees with a brief 1-page outline containing information about the project that included the project objectives and proposed outcomes to demonstrate how the project could be of use to their work. Prior to each interview, the team outlined the areas that would be covered in the interview. The interviews sought to investigate the international activities and approach of each organisation, as well as information and guidance about trends in the internationalisation of HE, evidence of greater international competition and growing internationalisation in the UK, and examples of institutional and national strategies related to internationalisation. The interviews also sought perspectives from the interviewees on the planned methodological approach, the usefulness and appropriateness of the institutional 'audit tool', and whether other approaches had been used in other UK institutions.

2.35. Following the interview the respondents were asked if they would be willing to engage/be involved with the project in some way as part of an expert 'panel' (e.g. advice, information, guidance, comments on the findings, interpretation, and dissemination). The project team felt that engagement from these agencies would help the project to have an impact on current thinking and practice, as well as improve the political impact and credibility of the project findings.

3. Data management and analysis

- 3.1. The project team followed the established ethical procedures in use at the case study institution when recruiting and interviewing staff and students, and in managing data. All interviewees were informed that the interviews would be recorded and transcribed, and were able to withdraw from the research at any time. In addition they were also given access to the interview transcripts, so that they could review and amend their comments if they so wished. All transcripts and digital recordings were stored securely and treated as confidential.
- 3.2. The literature and documentary data were collated and stored in a Reference Manager database, and classified according to a number of keywords that are described above (2.29). The documents were then reviewed and summarised by the project research team in relation to their key themes, as they related to the topics of interest for the project. The findings from the literature and documentary analysis are provided in sections 3 to 7 of this report.
- 3.3. The secondary data collected in the case study institution were collated and reviewed by the project team, based on the interview structure described in Appendix 1. To protect the confidentiality of the case study institution, the findings from this analysis are not provided in this report.
- 3.4. For the analysis of the qualitative interviews, the transcripts and notes from the interviews and groups provided the raw data for analysis. The transcripts were analysed using qualitative analysis software, and the researchers utilised a grounded theory analytical approach, structured around the themes used in the interview structure. Once again, the findings from this analysis are not provided in this report. However some themes that are of general relevance to other institutions are discussed in this paper, and are specifically referenced to the findings of the documentary and literature review.

4. Validation

- 4.1. Since the project was designed to facilitate quality enhancement, the project team plan to share the research findings with colleagues in the case study institution via internal seminars and workshops, through presentations to formal committees and international working groups on international strategy and practice, and via participation in institutional change projects related to international students and international strategy.
- 4.2. The project team had also intended to undertake two parallel surveys with groups of experts to test the research findings against the wider policy and research context (one of academic researchers, one of policymakers) using a Delphi approach (via telephone and e-mail). However, the labour intensive nature of the case study meant that there were insufficient resources to undertake these surveys. To compensate for the lack of these larger-scale surveys, the team conducted a smaller number of interviews with relevant experts in a sample of policy agencies to contextualise the research and to help validate the findings.
- 4.3. The project team made contact with researchers in a number of other universities who were investigating their international strategy and internationalisation approach to share findings and to help inform the project findings. The team was also contacted by other institutions and sought to exchange useful information. The team participated in workshops, seminars and conferences on internationalisation in higher education in order to test emerging themes arising from the research and to supplement their knowledge of practice beyond the case study institution.
- 4.4. Finally, the project team regularly shared their ideas with colleagues at the OBHE who acted as external advisors throughout the project on issues such as research design, analysis and the interpretation of findings.

5. Project Management

- 5.1. The project team were assisted in designing and undertaking the research by collaborators from within the pilot study institution and from staff at the Observatory on Borderless Higher Education (OBHE). The pilot study institution provided a degree of matched funding for the project in the form of the time of key staff to assist with project management and dissemination within the institution. The OBHE provided expert advice to the project team at all stages and were also subcontracted to undertake a piece of desk research to inform the project, which is incorporated into Section 4 of this report.
- 5.2. The project was overseen by a Project Management Group that consisted of two project researchers, the project partner from the OBHE, and three senior managers from the case study institution. This group monitored the project activities in accordance with the project objectives. This group also helped the project team to access interviewees, advised on data collection tools and the literature review, and helped to interpret and verify the research findings.

6. Outputs and Dissemination

- 6.1. The project was designed to produce outputs and disseminate the project findings in a way that was of maximum utility to the developmental needs of the case study institution, and of use to practitioners, policy-makers and researchers in the wider higher education sector.
- 6.2. The case study institution has received two research reports from the project team. This main report provided findings from case study research within the institution as guidance on the university's international strategy development and implementation; an earlier paper in June 2006 offered a 'marketing perspective' focused on trends in international higher education to inform the university's strategy for its international activity. The project team will also disseminate the project findings via a range of internal seminars and dissemination events within the case study university (e.g. strategy groups, university committee, staff forums) and through an article in the institutional newsletter.
- 6.3. This report for the Higher Education Academy is tailored to the needs of other institutions and practitioners in the UK HE sector. It does not contain specific findings on the international activities and strategy of the case study institution, but instead focuses on the experiences of developing and piloting the self-assessment or 'audit tool' to investigate international strategy and activity in an institutional context. It also integrates within each section a review of relevant research on the topic area and an analysis of international strategies at the institutional level, and national or sector level in the UK and beyond.
- 6.4. Following the publication of the final project report, a national policy seminar is planned to discuss the research findings and their wider implications for policy and practice. The research/benchmarking tool is intended to be of use to other institutions and there are a number of potential avenues for further research arising from this pilot project.
- 6.5. A project web site has been developed containing project reports, details of the piloted methodology, and other relevant information and data. The findings will also be publicised through articles in the press and relevant academic journals and through other dissemination channels co-ordinated by the Academy and other organisations active in the field of international higher education.

7. Summary

- 7.1. Section 1 provides an overview of the project aims and objectives in relation to the Academy's core research themes. These two themes were: to develop institutional research related to improving students' experiences in higher education institutions and to investigate the impact of growing competition on the experiences of international students in UK higher education. In this project these two themes were combined. The main research vehicle was an institutional case study that focused on links and gaps between institutional policy, practice and the experience of international students.

7.2. Details of the methodology used in the project are also provided in this section, including data collection methods, analysis, project management and validation. The main methods used to collect data were interviews, documentary analysis and literature searches.

7.3. This section also provides detail on the context from which the research focus emerged (namely increasing competition and growing internationalisation in higher education in the UK and beyond) and the anticipated outcomes of the project with associated plans for dissemination. The outcomes from the project were designed to offer useful data and information for four audiences:

- the case study institution (as a means of enhancing strategy, practice and experience related to internationalisation);
- other institutions, through the delivery of a piloted institutional review tool and wider analysis of institutional, national and international policies and strategies for internationalisation;
- policy agencies, through the analysis of strategies at national and international level and the findings from the desk research;
- other researchers through contribution to the academic literature on international strategy and practice in higher education.

Section 2: Desk Research Findings – Trends in International Higher Education (Objective 1)

1. Overview

- 1.1. As described in Section 1 (1.2 to 1.5), this project was conceived in order to investigate impact of three factors that are becoming increasingly important to the international activities of UK higher education institutions, namely:
 - The increasingly dynamic nature of the global higher education context
 - The impact of this changing context at policy level in the UK
 - Strategic responses by UK institutions to the changing higher education context
- 1.2. This section seeks to provide background information from the policy and research literature related to the first of these factors. The other two factors are referred to briefly, although they are explored in detail in Sections 3 and 4.
- 1.3. The section begins with a brief overview of internationalisation and globalisation as it relates to higher education in the UK and beyond. It then identifies some of the key trends and impacts of internationalisation and globalisation on the activities of UK higher education institutions, focusing on four key issues; changing patterns of cross-border recruitment; the growth in international partnerships and collaboration; the increasing focus on the quality of the international experience; and the increasing incidence strategic approaches adopted by institutions in response to these trends.

2. Internationalisation and Globalisation

- 2.1. UK higher education institutions operate in the same changing international context as organisations in other sectors and countries, and the issues that they face are not unique. The major contextual influence in recent years has been the increasing influence of different types of internationalisation and globalisation that impact upon nations, organisations and individuals in a range of different ways.
- 2.2. Economically, few organisations can ignore the opportunities, threats and overall impact of international trade and the flow of finance and information across the world. Products, services and human resources are increasingly mobile, and flow across traditional political and geographical boundaries. Facilitated by the accessibility of transportation options and technology that enables rapid information sharing, organisations have increasing proximity to their overseas markets and suppliers. International transactions, multi-site operations and international partnerships and alliances are visible aspects of globalisation. Organisations and businesses are increasingly interconnected and interdependent, and sensitive to economic conditions in other countries. An important consequence is the growing need for staff, processes and products to become more 'internationalised' or globally orientated.
- 2.3. Politically there is a similar trend towards inter-connectedness and borderlessness that manifests itself in official linkages (through the European Union (EU), the United Nations (UN) or the Organisation for Economic Co-operation and Development (OECD) for example) or less formal cooperative activities in response to problems and concerns, such as terrorism or global warming, that have international and global implications.
- 2.4. In the social and cultural sphere, individuals and groups also increasingly share ideas, information and knowledge, and participate in discussions and debate across traditional borders, either via various forms of communication technology or physically, through the accessibility of cheap foreign travel.
- 2.5. Organisations in different sectors respond to the particular challenges and opportunities presented by the changing context in a range of ways, with different levels of national policy guidance. Higher

education is no exception and Kehm and de Wit (2005) and OECD (2004) present recent perspectives of the impact of internationalisation and globalisation on higher education in Europe and beyond.

- 2.6. However, in the UK at least, the response to increasing levels of internationalisation and globalisation has largely been driven by institutions themselves rather than governments (except in certain areas, such as national marketing and branding). Institutional autonomy has meant that institutions have been proactive in recruiting overseas' students and developing international opportunities according to their own strategies, economic position and priorities.

Internationalisation and Globalisation and UK Higher Education

- 2.7. The UK higher education sector has long considered itself as 'international' in terms of its outlook and activity, but HE institutions worldwide are now beginning to reassess their rationale and approach towards their international (and sometimes global) activities in response to the changing international context.
- 2.8. UK institutions are increasingly competing, both nationally and internationally, in the recruitment of overseas' students. Their research activities have been undertaken in an internationally competitive environment for even longer (Scott (ed.), 1998). In the global higher education arena there has also been an expansion in the provision of 'borderless' and cross-border education (CVCP, 2000; OECD, op cit.), growth in the number and types of international institutional consortia (Teather, 2004) and joint degrees (Tauch and Rauhvargers, 2002), and a spread of teaching in English by non-English speaking countries (Maiworm and Wachter, 2002).
- 2.9. Increasing pressures on higher education finance have led to a greater focus by governments world-wide on the economic and trade benefits associated with international higher education, and the positioning of higher education as a tradable export service. Financial benefits have flowed to English speaking provider countries over the last 20 or more years and the scale of the global higher education enterprise is such that it now falls within the General Agreement on Trade in Services (GATS) under the auspices of the World Trade Organisation.
- 2.10. A more strategic approach to international higher education is also being encouraged at national level in the UK by government (DfES, 2004) and at sector level by policy and marketing agencies (UUK, 2005 and British Council, 2006). Both government and agencies seek to ensure that the UK and its higher education institutions remain competitive in an increasingly crowded global market for students, staff and research funding (see Section 4 for more detail on these strategies). More research is being undertaken in this area, and more high level and comprehensive international strategies are emerging at national and regional (e.g. EU) levels. In addition, institutions themselves are also taking a more strategic approach to their international activity (see below).
- 2.11. UK higher education is also increasingly influenced by policies at the international level. Issues such as trade regulations in education (e.g. the General Agreement on Trade in Services (GATS) discussions), international action related to student mobility (e.g. the Bologna Process), quality assurance (e.g. United Nations Educational, Scientific and Cultural Organization (UNESCO) and OECD guidelines) and professional accreditation (e.g. in law, engineering, accountancy, medicine and others fields) are of importance to education, research and knowledge transfer activities.
- 2.12. The impact of globalisation will also fall on graduates, providing opportunities to work in an international employment market, provided they have relevant skills, knowledge and self-awareness. They will also require adaptability and sensitivity to the impacts of globalisation in the course of their personal and professional lives. Both dimensions have implications for the content of curricula and the wider experience of higher education for all students.

3. Key Trends and Impacts

- 3.1. The influence of the changing international context and the impact of globalisation can be observed in some visible trends in the higher education sector. The first major trend is increasing international

competition (in research and education), a second involves efforts 'to internationalise' strategies and practice - and often the two converge.

- 3.2. The trend towards increasing competition refers to the phenomenon that higher education institutions (and other educational providers) worldwide are competing with each other in an increasingly global marketplace for international students, international academic partners, and research funds.
- 3.3. The trend towards internationalisation relates to the growing range and complexity of international activities undertaken by higher education institutions. The concept of 'internationalisation' is interpreted differently in different contexts and can be used narrowly to cover only international student recruitment, or more widely to include various forms of international cooperation between institutions, groups of institutions, the corporate sector or even whole higher education systems. Some institutions adopt an even broader conceptualisation that acknowledges the inter-cultural dimensions of teaching and curriculum development, research, knowledge transfer and student support and which views internationalisation as a process of transforming all aspects of the institution itself in terms of its international and inter-cultural mission.
- 3.4. Beneath these two trends are a number of other trends that are evident in the UK higher education sector, each of which is discussed below.

a) Changing Patterns of Cross-Border Student Recruitment – Increasing Demand, Diversity and Competition

- 3.5. The most high profile impact of the changing international context on UK higher education has been the pattern of international student recruitment, particularly the growing and complex cross-border (i.e. transnational education and overseas study) higher education market. The changing pattern of cross-border recruitment has three key dimensions, increasing levels of demand, increasing diversity and increasing competition. The interaction of these three dimensions has produced a fourth dimension, namely the increasingly volatile nature of cross-border student recruitment that has already had a significant impact on the UK higher education sector.

i) Increasing demand

- 3.6. The report 'Vision 2020' published in 2004 by the British Council in collaboration with UUK, and IDP Education Australia provides a detailed analysis of current and future demand for higher education places in the main English speaking destination countries from 144 provider countries (Bohm et al., 2004). This report concluded that demand for higher and further education (i.e. tertiary-level education) remains high and is predicted to grow, fuelled by high levels of unmet demand for higher education in many parts of the world particularly in India and China. The Vision 2020 research predicted that even using a 'base case' scenario, demand for international education in the major English-speaking destination countries (MESDCs) would grow from 1m in 2000 to 2.6m places in 2020. Over 500,000 of these places are predicted to be located in the UK, together with a similar number of places offered by UK institutions transnationally.
- 3.7. At the EU level, Vision 2020 reported that demand for UK HE places from EU Accession states was likely to treble by 2010. In addition, the Bologna process has encouraged institutions to foster student mobility through developing credit transfer arrangements, comparability of qualifications and the SOCRATES and ERASMUS schemes to support student exchange and study abroad opportunities (Bohm et al., op cit.).

ii) Increasing diversity of types of provision

- 3.8. Secondly, there is a noticeable trend towards greater diversity in the types of provision (or delivery modes), the types of providers and the types of students engaged in cross-border education.

- 3.9. Many providers have diversified and expanded their overseas' activities and linkages, in an attempt to avoid an over-reliance on international student recruitment from a few source countries or related to particular kinds of provision. Institutions now offer different types of 'transnational' provision (e.g. distance learning, overseas campuses, and collaborative programmes) to students either unable or unwilling to take on the expense of relocating overseas. Developing this type of provision potentially allows institutions to increase their enrolment capacity overseas, without the associated costs of on-campus study in the UK, although with other additional costs that require detailed analysis and risk assessment. For importing countries, transnational education offers an opportunity to help meet unmet demand, develop local capacity and attract students from other countries.
- 3.10. In particular subject areas and for certain delivery modes (e.g. professional and vocational subjects, distance learning) there has been a growth of 'new providers' in the higher education market such as private universities, for-profit universities (e.g. Phoenix and Sylvan) and local private colleges and universities as the higher education market becomes more 'borderless'.
- 3.11. In terms of distance learning/e-learning, many institutions are developing flexible modes of learning which combine different delivery modes e.g. face-to-face and distance/on-line, evening and weekends, collaborative provision with overseas/local/private providers, etc. The problems with the UK e-University have discouraged many UK institutions from seeking to deliver wholly on-line based courses (the Open University (OU) being an exception) and the developments described above will also influence strategy in this area. In addition, international organisations (e.g. the Commonwealth of Learning (COL), UNESCO, and the World Bank) are supporting the development of open universities and virtual universities in developing regions (such as parts of the Commonwealth, Asia, Africa and the Arab states), and the use of 'open source' materials to help reduce the impact of technological inequality or the 'digital divide'. The development of open universities and virtual universities has development rationales and represents attempts to build sustainable capacity in these regions (Daniel, 2004).
- 3.12. Students that are seeking to study via cross-border education are also becoming more diverse and whilst some are seeking the benefits of the overseas study experience, others are seeking more flexible modes of learning that combine different delivery modes e.g. face-to-face and distance/on-line, evening and weekends, study on collaborative programmes with study periods at both overseas and local/private providers, etc. This diversity in the student profile has implications for services and widening participation agendas.

iii) Increasing diversity of types of providers

- 3.13. Increase in demand and diversity has also been accompanied by a related increase in competition between countries and between providers to recruit cross-border students.
- 3.14. The UK as a whole has traditionally competed with the other major English speaking destination countries at a national level (e.g. USA, Australia, and Canada) for international student enrolments. Historically, many students have chosen the destination country first before choosing a particular institution or course of study and choose these countries due to their reputation for quality. However, students now have a greater choice of destination countries as other Western European nations (e.g. France, Germany, Scandinavia and the Netherlands) are offering courses in English, and traditional exporting countries (e.g. Malaysia and India) are also recruiting international students themselves.
- 3.15. In summary at the institutional level, UK Higher Education Institutions have different types of competitor namely:
- Other UK Higher Education Institutions
 - Overseas Higher Education Institutions (e.g. in the USA, Australia, France, Germany, and East Asia) and other education providers (e.g. consortia) that provide courses (in English) that are in direct competition for similar courses of study
 - In addition to their traditional competitors (e.g. other public higher education institutions) UK institutions also face competition in particular subject areas and delivery modes (e.g. professional/vocational subjects, distance learning) from 'new providers' in the higher education

market such as private universities, for-profit universities (e.g. Phoenix) and local private colleges and universities in overseas markets. The changes to Degree Awarding Powers (Higher Education Act, 2004) in the UK are likely to increase the prominence of such providers (e.g. BPP Professional Education).

3.16. More specifically, within the UK, institutions face internal competition for international students and collaborative linkages from:

1. Local universities with comparable subject portfolios and perceived standing, especially those with competitive advantages such as greater resources deployed to support international collaboration and partnership formation, international recruitment and transnational activity; a higher level of student support and guaranteed student accommodation; or lower costs.
2. Other UK Universities that have developed partnerships (often but not always, research collaboration based) with overseas in-country providers; pursued 'twinning' and joint-degree strategies with partners in countries such as Malaysia, China and India; adopted robust strategies such as use of agents, scholarships and alumni groups; and which have established more efficient process management and applicant relations, and have a better reputation for high quality student support. Institutions that are actively competitive in some of these ways include Sheffield, Salford and Loughborough. Institutions are also opening campuses and centres overseas (e.g. Nottingham, Middlesex, Heriot-Watt, and Westminster).
3. Universities that are aggressively pursuing increased income from international student fees to compensate for insufficient Government funding, especially where they plan to develop or already offer programmes or faculties in popular subject areas – particularly if they have a strong specialism in key subject areas.
4. Universities that are placed higher in the widely publicised national (and international) rankings, overall or by key subjects, which have established a more substantial presence and recruit more aggressively in major markets.

iv) Increasing volatility

3.17. Growing diversity and competition has affected the predictability of the overseas student recruitment market which is now seen as 'volatile', and institutions are being warned about over-dependence on income from overseas student fees.

3.18. International student fee income has become increasingly important to many UK HEIs. Income from international student fees at English HEIs nearly doubled between 1999-2000 and 2003-2004 (from £583million to £1,121million - or in percentage terms from 6% to 8% of institutional income) (HEFCE Annual reports 2000-2004). Economically successful institutions (and academic units) in the UK have come to rely on the income 'stream' produced by the provision of education to overseas' students. In 2004, Middlesex, Hertfordshire and Westminster all earned more than £20m from international student fees (Macleod, 2006).

3.19. However, in March 2006 the Higher Education Policy Institute (HEPI) produced a report highlighting the potential impact of 'under-shooting' international student recruitment for institutions (e.g. Essex, Luton and City) where international fee income represented a significant proportion (around a fifth) of total revenue. It suggested some institutions' finances would be severely hit by a 25% downturn in income affecting their ability to generate financial surpluses and their profitability (HEPI, 2006).

3.20. Clear indications of volatility in the market-place were evident after the 2003-04 highpoint of growth in international HE students coming to the UK. After this point, growth has been modest (3.7% growth in 2004-5), and a survey for UUK in late 2005 suggested that around 80% of universities saw enrolments of overseas' students decline for 2005-2006 compared with 30% reporting a decline in the previous year. In many UK institutions, applications from China for study in the UK dropped significantly for 2005 entry. These recruitment problems have forced a rethink by many experts about the robustness of predictions related to demand for cross-border education described in Vision 2020 (Bohm et al., op cit.).

- 3.21. The greater volatility in recruitment is due to a combination of factors including; improvement and diversification in national education systems (e.g. Singapore, Hong Kong and Malaysia); changing economic and political relationships between countries; exchange rates; costs of study and associated living costs; student quality and value perceptions; graduate employment prospects; immigration requirements; and crime and safety issues.
- 3.22. In response to these trends many institutions are becoming more pro-active in their marketing and recruitment strategies, and have identified a need to take a more flexible and alert approach to overseas marketing. At one level, given the volatile policy contexts in many countries, many institutions now view relationships at government level as a more robust way of securing international students than direct marketing to, and links with, institutions or students.
- 3.23. The trends described have also resulted in a desire amongst institutions to improve the level and depth of in-country knowledge, intelligence and expertise in key or emerging markets within the international office or division, through developing overseas offices and centres, recruiting overseas agents and by commissioning detailed market research. Recruitment strategies can also involve targeting countries and regions that have higher education requirements that are appropriate for an institution's programme portfolio.

b) Growth and Diversity of International Partnerships and Collaboration

- 3.24. As with student recruitment, UK institutions have, for many years, collaborated with international scholars, researchers and external organisations in all of their key areas of activity; teaching, research and knowledge transfer. Such activity includes joint or collaborative research projects, capacity building projects in developing countries, joint teaching programmes, staff and student exchange programmes and knowledge transfer partnerships with international public and private sector organisations.
- 3.25. There are indications that international research collaboration has increased substantially in recent years. A recent study of citations and cross-border authorship between scholars shows that collaboration is increasing in all disciplines (Wagner and Leydesdorff, 2005).
- 3.26. UK institutions have received research funding from international agencies for many years, although competition for such funds is becoming more intense, leading many UK institutions to improve their organisational structure, research support and administration, and to develop regional research partnerships to help secure funding.
- 3.27. The number of memoranda of understanding and collaborative links between UK and overseas institutions is often very large, although in the past these have rarely been strategic or centrally coordinated. However, there is now a growing trend towards greater central planning and co-ordination of collaboration and partnerships. For example, the increasing amounts of transnational provision described above have generated a requirement for central co-ordination to help ensure quality and ultimately institutional reputation, especially given the findings of a recent review by the QAA of its collaborative provision audits that revealed concerns about the management systems and quality control in some UK overseas collaborative ventures (QAA, 2006). The international quality assurance environment is becoming more complicated and fluid, and requires constant monitoring.
- 3.28. In addition, national and EU initiatives (e.g. the European Research Area and the Bologna process) have created opportunities that encourage (with the provision of financial support) cooperation in research, joint degrees and student and staff exchange partnerships.
- 3.29. There are now increasing numbers of institutional level partnerships and collaborations related to international activities both within the UK and internationally. Some examples of collaborative models include:
1. The development of regional or international networks – e.g. groups of like-minded institutions working together for mutual advantage (e.g. the Worldwide Universities Network (WUN), the League of European Research Universities (LERU) and Universitas 21).

2. Institutions sharing the risk of overseas activity – e.g. the development of an overseas presence, creating critical mass, or up-scaling activity (e.g. Loughborough University in Egypt).
 3. Institutions sharing marketing knowledge and intelligence about markets, regulation, opportunities, and international competition (e.g. through initiatives such as the Interactive University in Scotland).
 4. Institutions sharing expertise – e.g. in transnational education (i.e. distance learning, overseas campuses, collaborations), academic and organisational structures, quality control, risk management, finance, etc.
- 3.30. The growth in international partnerships and collaboration also has a knock-on impact on staff who are likely to be required to be more internationally mobile if involved in research projects or teaching programmes, which could include exchanges or periods teaching overseas. UK institutions have historically recruited staff internationally, but more staff with language skills and international experience are likely to be sought to work on international projects and collaborative programmes. In addition, UK staff are also likely to need more language skills and cultural diversity training.

c) Increasing Focus on the Quality of the International Student Experience

- 3.31. Given the increasing amount of choice available, overseas students are becoming increasingly focused on the nature of their overseas experience in totality when selecting an overseas study programme. Students are focused on ensuring that they receive an acceptable return on their investment in course fees and associated living expenses.
- 3.32. The international student experience has four main elements which are: educational; socio-cultural; administrative; and employment related (see Section 6 for more analysis of recent research on the international student experience). Students studying via transnational provision will also require different types of support, and this will need to be organised and evaluated in association with partner organisations, although the experiences of transnational students studying on UK transnational education (TNE) courses are relatively unknown at present.
- 3.33. The educational element of the study experience includes the content of the course/programme and its reputation for quality. It also covers the quality of teaching, support from tutors and the recognition of the qualification for employment and further study. Some institutions are seeking to 'internationalise' the study experience through reform of the curriculum (sometimes described as Anglo-centric) to ensure international relevance of its content, and to provide opportunities for language learning and study overseas.
- 3.34. Students also look for socio-cultural experiences during their study abroad, which includes social interaction with UK and other international students via trips, living arrangements and social events. Some institutions are also attempting to facilitate this process through ensuring that all students and staff receive training and guidance in cultural sensitivity, respect for diversity and understanding of other cultures. Home students and staff are also often offered language classes and training in learning styles and study skills to help improve cross-cultural awareness.
- 3.35. The administrative side of the student experience is also increasingly important for international students. This covers international students' interactions with university support services, particularly the nature and quality of services that are designed for international students (e.g. international offices). Key elements include the quality of the process from application to enrolment, advice and guidance whilst studying and the availability of financial support (i.e. scholarships). There is a trend towards more attention and investment on the non-academic elements of the study experience for international students as mechanisms for adding value to programmes of study and as a means of differentiation from other institutions. At national level, administrative issues such as immigration and visa regulations can significantly influence students' perceptions of their overall study experience.
- 3.36. The final, and relatively novel, element of the student experience covers the relationships between students' period of study and their future employment options or career. Many overseas students see their period of overseas study as a key element in securing employment and are increasingly interested in whether courses of study will result in experience and qualifications that will help them achieve this goal. To this end institutions, together with professional bodies (e.g. in subjects such as

health, law, and accountancy), are looking at developing curricula to ensure that the content provides all graduates with skills and knowledge (i.e. global competencies and perspectives) relevant to international career paths, and some offer international (and local) work placements or professional training years abroad to assist students with their employability. In addition, careers services are increasingly tailoring their services to overseas as well as home students.

- 3.37. The overall growth in student numbers, widening participation and the introduction of higher fees have meant that student retention, support mechanisms and the study experience for all (home and international) students are becoming increasingly important in UK institutions. Bournemouth University is seeking to ensure that their study experience equips 'students and staff with the knowledge, skills and understanding to enable them to interact with, and make an effective contribution to, an increasingly globalised world' and other universities are collaborating with Kingston University on plans to establish a Centre for Global Citizenship.
- 3.38. Given increasing levels of competition for overseas students and the importance of international fee income to institutional finances, universities and colleges are becoming more sensitive to the impact of international student perceptions on their reputation for quality and future overseas recruitment via word of mouth recommendation. Some institutions offer bespoke services for international students whilst others see their support for overseas students as part of their overall student support systems.
- 3.39. There is a growing trend amongst institutions to investigate international student decision making and student satisfaction as a means of monitoring their success in meeting and managing expectations, particularly in response to some claims that overseas students are perceived as 'cash-cows' (HEPI, op cit.), and student recruitment is often divorced from student support and the quality of the wider 'student experience'. Furthermore Colin Gilligan suggests that UK institutions over-promise and under-deliver when it comes to providing international students with a high quality study experience (Sheffield Hallam University, 2005).
- 3.40. QAA institutional audits investigate international students' experiences both in the UK and in collaborative programmes, and regular research on international student satisfaction is being undertaken at sector level (by UKCOSA) and by institutions either individually or in a benchmarking group (e.g. the I-Graduate International Student Barometer). This research is discussed in more detail in Section 6.
- 3.41. In Australia, the Education Services for Overseas Students (ESOS) Act, an internal quality assurance regime, heavily regulates HE institutions that recruit international students. The ESOS Act has an emphasis on safeguarding the interests of the student. It is perceived amongst many to be an important guarantor (or even service level agreement) for overseas governments, students and parents.

d) Increasing incidence and sophistication of institutional international strategies

- 3.42. International activities have been central to the mission of higher education institutions in the UK for a number of years. Most UK higher education institutions have a significant number of international staff and students, and have some kind of international linkages with overseas institutions such as collaborative programmes, joint research projects and staff and student exchanges, as well as links with overseas governments and international agencies.
- 3.43. However, these strands are not always brought together and coordinated, nor do they necessarily link or communicate with each other consistently or effectively. Furthermore, the 'international' character of the institution is often accepted as a given rather than embedded within the strategic/corporate plan and expressed through practice at different levels.
- 3.44. Significant levels of international activity now require large-scale investment and increasingly sophisticated business models, which has implications for governance. Therefore, higher education institutions are first, looking for distinctive and sustainable approaches to their international activity (within defined timescales) and second, investing more heavily in international activities which are increasingly underpinned by comprehensive international or 'internationalisation' strategies and resource frameworks. To a certain extent, 'internationalisation' is now starting to be used as a

competitive differentiator in cross-border recruitment (e.g. in Australia, New Zealand, the UK, and the USA) and as an indicator of quality.

3.45. As Bartell (2003) points out, internationalisation in higher education is far from a clearly defined and understood concept. Strategic institutional responses to internationalisation range from aspirational goals to detailed international strategy documents containing strategic objectives and performance indicators. Some institutions have created senior management roles to lead the implementation of international strategies, whilst others prefer a more devolved approach. Some have sought to centralise the co-ordination of their international activities to ensure fit with institutional mission, the prioritisation of resources and to support quality assurance, whilst others have sought to change the ethos of the institution to make it more 'international' or 'global' in outlook. As Bartell (op cit.) points out:

“The reality, then, is that internationalization conveys a variety of understandings, interpretations and applications, anywhere from a minimalist, instrumental and static view, such as securing external funding for study abroad programs, through international exchange of students, conducting research internationally, to a view of internationalization as a complex, all encompassing and policy-driven process, integral to and permeating the life, culture, curriculum and instruction as well as research activities of the university and its members (p.46).”

3.46. Each institution will have a different approach to, and understanding of, what internationalisation means to their institution, and where their particular focus should lie, although this typically is based on one or more of economic, academic, developmental or cultural rationales. A more detailed examination of institutional responses to the international agenda is contained in Section 5 of this report.

4. Summary

- 4.1. This section of the report focuses on trends in international higher education in relation to the context in which institutions are operating and as reflected in, or as having an impact upon their internal strategies and activities.
- 4.2. The introduction briefly identifies general aspects of globalisation and internationalisation that affect all sectors and other organisations before focusing on higher education specifically. In relation to the higher education sector, the analysis first considers evidence of 'increasing competition' (particularly related to education, given the focus of the project). Secondly, this section offers evidence of 'growing internationalisation'.
- 4.3. Increasing competition is linked to increasing demand for international educational opportunities from students, increasing diversity and choice in relation to the educational provision on offer, the increasing range of providers seeking to recruit international students and the variety of students and their requirements. Increasing competition and changing patterns and dimensions of the international market-place for education is producing increasing volatility and unpredictability for institutions, with higher levels of risk and challenge. Growing competition internationally - and nationally - for international students is an important part of the context of internationalisation in institutions and at national levels. However, the wider context of globalisation is also relevant. Institutions are seeking to 'internationalise' not only as a competitive market response, but also for wider educational reasons that focus on enrichment of curricula and quality enhancement. Examples of internationalisation in institutions are provided including growth in diversity of international partnerships and collaborative activities, emphasis on the quality of students' learning experiences and the growing incidence and sophistication of institutions' international strategies.

Section 3: Research Findings – UK and International Policy Responses to the International Higher Education Context (Objectives 2 and 5)

1. UK Policy Context

- 1.1. As described in Section 2 (2.30-2.35) the project team undertook a profiling exercise of policy agencies and government departments in the UK with the aim of exploring their views on the nature and extent of 'increasing competition and growing internationalisation' in higher education and to identify associated policy responses.
- 1.2. A small number of organisations (9) were identified as first order contacts and interviewed for the project; the limitation on the number of interviews was available time and resources. The second order contacts were profiled based on publicly available information about their activities (e.g. policy/strategy documents and organisational web sites). All the organisations identified for the profiling exercise were selected on the basis of their interest, expertise and responsibility in the topic area and whether they had developed international strategies (or international aspects to their corporate strategies) of particular relevance to higher education institutions and their students. The final list is illustrative rather than comprehensive.
- 1.3. The following organisations were included in the profiling exercise:
 - Universities UK
 - Universities Scotland
 - Quality Assurance Agency for Higher Education and QAA Scotland
 - Department for Education and Skills
 - Scottish Executive
 - Welsh Assembly
 - Department for Employment and Learning Northern Ireland
 - UK Trade and Investment
 - Department for International Development
 - British Council
 - UKCOSA
 - Higher Education Academy
 - Observatory on Borderless Higher Education
 - Leadership Foundation for Higher Education
 - Higher Education Funding Council for England
- 1.4. A separate and more detailed report on the policies and strategies of the fifteen national agencies, departments and associations has been created (see Appendix 2). This section summarises our findings from the data collected.

Increasing competition and growing internationalisation

- 1.5. The majority of the organisations referenced in this section described the context in which their strategy was crafted as one of 'global competition' or 'increased globalisation', and reported the growing importance of 'internationalisation' for countries and regions, business and higher education. The central role of the higher education sector in the development of knowledge economies was also a theme. The international context for policy-making was typically described as complex, challenging and dynamic, with both competitive and collaborative activity in evidence. For the majority of organisations, an economic dimension (whether viewed positively or negatively) was dominant, both as a driver and as a policy response. A summary of the main

internationalisation drivers as reported by the policy agencies and an outline of some of the main policy responses to these drivers is provided in Table 1 below.

Table 1: Internationalisation drivers and policy responses (economic)

Driver	Policy Response
Increased globalisation of economies, trade, services	<ul style="list-style-type: none"> • Opportunities for export and inward investment
Competitive global economy	<ul style="list-style-type: none"> • Prosperity depends on harnessing the best knowledge and skills for the economy • Marketing business strengths overseas
Development of knowledge economy	<ul style="list-style-type: none"> • Need for strong, entrepreneurial institutions • Employability and entrepreneurial skills for students
Growing the national or regional economy	<ul style="list-style-type: none"> • Develop and promote national and regional business internationally
HE operating in a global market	<ul style="list-style-type: none"> • Grow market for international students • Increase funding stream from international students
Rapid economic change, inequality, competition for natural resources	<ul style="list-style-type: none"> • Use the power of economic development to change lives • Harness technological and scientific ingenuity for service of the poor

1.6. Beyond economic perspectives, other rationales for internationalisation were evident. These included:

1. The growing significance of the European agenda
2. Developing global citizenship
3. Comparing performance and learning from others
4. Developing international links to increase national and regional profile
5. Greater mutual understanding
6. Counterbalancing the ideological tensions of globalisation
7. Growing internationalisation of curricula and standards
8. Development aid and capacity building
9. International partnerships for mutual benefit
10. International partnerships for strategic positioning

1.7. While the overall picture was clear, there are some important nuances to record. For example, respondents in one organisation debated whether the current theme of 'growing internationalisation' (which was acknowledged) represented a new and different agenda or a development of a continuing cycle where 'the international dimension' waxed and waned in strength of focus for institutions and agencies. Secondly, organisations differed in whether international engagement was valuable in itself (for learning or other mutual benefit) or whether it was largely instrumental, aimed at returning benefits to the region or country. A distinction can perhaps be made between those strategies that were 'collaborative in ethos' and those that were 'competitive in ethos'. In the latter case, the main purpose for international collaboration appeared to be to achieve competitive advantage, national profile or strategic global positioning.

1.8. The kind of activities that the organisations were undertaking to respond to increasing competition and growing internationalisation varied according to their status and function. However, there were a number of themes across the organisations including:

1. Benchmarking and promoting best practice
2. Developing international frameworks and standards
3. Marketing
4. Development funding (for projects, scholarships, exchanges)

5. Creating networks
6. Market information and market opening
7. Monitoring comparative performance
8. Capacity-building, nationally and in other countries
9. Policy analyses and briefing
10. Specific guidance

1.9. The UK policy context that we have noted through the interviews and desk research fits into the definitions and conceptual framework for internationalisation that has been developed by de Wit (1999) and Knight (2003). The rationales for internationalisation that they list at national level include academic, social and cultural rationales and political and economic rationales. Both authors note the current predominance of political rationales (such as national identity, foreign policy, technical assistance) and economic rationales (including economic growth and competitiveness) at national and regional level. Within these rationales, Knight also reports the growing importance of particular political and economic themes. The first theme is focused on attracting and developing human capital through national strategies for recruitment (of students) with associated incentives and immigration policies. This theme also includes an emphasis on developing core competences for professional mobility and global citizenship. The second theme is focused on strategic alliances between countries, particularly at regional level, but also beyond. The purpose is to achieve competitive advantage; and higher education collaborations are seen in this light by governments and institutions. Trade in higher education services is a third theme, as countries see the financial benefit of exporting educational services. The fourth theme, nation-building, is described in terms of importing programmes and institutions to grow capacity in countries where the provision of education lags behind economic needs.

2. International Policy Context for Higher Education

- 2.1. The main source of data on the international policy context is a small-scale desk-based survey undertaken for the project by the Observatory on Borderless Higher Education (OBHE). Once again, we sought evidence of 'increasing competition and growing internationalisation'. Reference is also made to recent work on national-level strategies for internationalisation and trade in higher education undertaken by the OECD (2004, op cit.). The detail of the OBHE's report is attached as Appendix 3. Here we summarise the key themes and draw some comparisons with the UK context described above.
- 2.2. The OBHE report states that internationalisation has become an increasingly important phenomenon for the higher education sector of most, if not all countries. The evidence for this conclusion comes both from the OBHE's own ongoing work on borderless higher education and from a recent survey undertaken by the International Association of Universities (IAU) (IAU, 2005).
- 2.3. The survey undertaken by the OBHE for this project focuses on the responsiveness of other countries to the changing international context and points to 'economic rationales' as the main theme represented in national policies and strategies, confirming the findings of de Wit (op cit.). However, there are some differences between countries and regions and these are highlighted in the analysis. For the purposes of the analysis, countries were grouped into three categories to illustrate variations within an economic rationale for internationalisation:
 - Internationalisation provides a short-term as well as long-term contribution to the country and the higher education sector (US and Australia).
 - Internationalisation provides limited immediate financial contribution to the country and institutions, but a perceived long-term contribution to the society as a whole (Denmark and Germany).
 - Internationalisation is actively encouraged as a way of enhancing or creating a knowledge-based society (Singapore, Malaysia, United Arab Emirates, South Africa, China, India and the Dominican Republic).

- 2.4. Within each category, a range of indicators of internationalisation were examined at national and institutional levels. These were indicative rather than exhaustive. The indicators included international student recruitment to the home country, export of education, participation in exchange programmes, study provision in English (or in other languages for English-speaking countries), and development of joint or double degrees. Other factors such as research collaboration and participation in consortia, internationalisation of curricula, and internationalisation of non-academic units, such as student unions, residence halls and career centres, could also be useful indicators, but were beyond the scope of the study. The indicators adopted arguably place strong emphasis on international student recruitment and on the import and export of transnational education. However, examination of the rationales behind other activities such as exchanges, research collaboration and joint degree programmes, seems to indicate that economic competitiveness (of the country and its workforce) can also be a driver here.
- 2.5. An important point made by Harman (2004) is that even where, as in Australia, initial emphasis was placed at national and institutional levels on the export of education (and trade in education more broadly), this has now led to other aspects of the institution becoming 'internationalised'. Since the 1990s increasing attention has been given to curricula and student services. The recognition of qualifications across borders (and the issue of credit transfer) has also become significant. The Australian example of taking a wider view of internationalisation followed critique that a narrow economic perspective was counterproductive. There are lessons here for the UK.
- 2.6. The conclusions that arise from the OBHE analysis are first, that changes are occurring in patterns of international recruitment. In particular, leading recruiters such as the UK, Australia and the US, have all experienced a downturn in the last two to three years (that is, of students travelling to these countries to study) while other countries and regions are at the same time growing their international recruitment of students through a variety of mechanisms including the import of transnational education. The emerging regional hubs are likely to become forces to be reckoned with as the higher education systems in the relevant countries (such as South-east Asia, the Middle East or China) become increasingly internationalised. International students may increasingly look to these countries and regions for a high quality, less expensive education closer to home and in what might be perceived to be a more familiar and welcoming study environment.
- 2.7. Second, the transnational education market is currently dominated by the US, UK and Australia, although there is evidence of other countries such as Germany, Singapore, Malaysia and India actively pursuing the export of higher education provision overseas. Joint degrees are also being adopted as a strategy for internationalisation. They are perceived in some cases as a lower risk option than other forms of transnational delivery, not least because of active governmental support for this development in some regions, notably Europe. Teaching in English is also of growing importance in attracting international students, although it is also noted that the acquisition of languages other than English is important for staff engaged in the setting up or delivery of transnational education.
- 2.8. A further important conclusion from this survey is that if international provision (wherever located) is to be sustainable, particularly given the choices now available to students, then increasing attention will need to be given both to the quality and relevance of the education provided and to satisfying the expectations and subsequent experiences of students. Internationalisation needs to deliver longer-term (including social and cultural) advantages otherwise economic benefits will not be forthcoming for long.
- 2.9. The OECD study (OECD, 2004, op cit.) concluded that there had been significant growth in cross-border higher education over the past twenty years, particularly in relation to programme and institution 'mobility' (i.e. delivery of transnational education) as well as the more traditional forms of student mobility (international student recruitment, study visits and exchanges). The OECD makes predictions of continued growth in this territory. The OECD's analysis focuses on four approaches observed across countries and regions: mutual understanding through broad-based alliances for teaching and research; skilled migration including policies to recruit and retain international students in the labour force; revenue generation through students' fees and capacity building through the import of educational providers and provision. Most countries are characterised by more than one approach, although the OECD also notes that the economic drivers are becoming more visible and dominant, with revenue generation being adopted more widely. They point to a decline in 'mutual

understanding' approaches although many institutional and national policies still adhere to this dimension.

2.10 If we combine the findings and conclusions from the Observatory survey with our own study, we would suggest that for UK institutions, 'mutual understanding approaches' that seek to build broad and deep academic alliances between institutions and countries may need to become a preferred option. Over the medium to longer term, revenue generation - and the sustainability of internationalisation strategies - may depend upon such approaches and the associated benefits arising for institutions, students and staff. At national level, this approach is also likely to be beneficial, allied to policies associated with a 'skilled migration' approach. There is little evidence that the UK is consciously importing new educational provision and providers from overseas (the fourth approach identified by the OECD). However, following the 2004 Higher Education Act, the general growth in new providers, and the growing incidence of cross-border provision, foreign and non-traditional higher education providers operating in the UK may become more prevalent and prominent in future.

3. Summary

3.1. Section 3 contains an overview of the findings of two small-scale surveys undertaken in this project, one focusing on national-level international policies and strategies in the UK, the other focusing outside the UK; the latter was undertaken by the OBHE. The detailed findings from these surveys are reported in separate appendices to this report (Appendix 2 and 3). Reference is also made to relevant studies undertaken by the OECD on growth in trade and cross-border higher education (2004, *op cit.*) and on trends in internationalisation (de Wit, *op cit.* and Knight 2003, *op cit.*).

3.2. Within the strategy documents of relevant UK policy agencies and government departments, there is frequent reference to 'increasing international competition' arising from globalisation and its effects. Where these agencies relate to higher education, they are seeking a number of responses from institutions including extra effort to recruit international students to the UK, to enhance the quality of students' experiences and to internationalise curricula. The main drivers are economic, including the need to achieve competitive advantage and to generate revenue, but several other social, political and environmental drivers were also mentioned in the strategies. The detailed strategies identify both the agency or departmental focus and the mechanisms that will be used to support, promote and encourage higher education institutions' own international strategies and agendas.

3.3. Analysis of national-level policies and strategies in other countries also highlights the dominance of economic goals in approaches to internationalisation, albeit with differences in emphasis and approach in different regions. To aid analysis, countries were grouped into three categories according to their approach to internationalisation:

- Internationalisation provides a short-term as well as long-term contribution to the country and the higher education sector (US and Australia).
- Internationalisation provides limited immediate financial contribution to the country and institutions, but a perceived long-term contribution to the society as a whole (Denmark and Germany).
- Internationalisation is actively encouraged as a way of enhancing or creating a knowledge-based society (Singapore, Malaysia, United Arab Emirates, South Africa, China, India and the Dominican Republic).

3.4. Indicators of internationalisation were identified as a basis for the groupings. These were by no means exhaustive, but included: international student recruitment to the home country, export of education, participation in exchange programmes, study provision in English (or in other languages for English-speaking countries), and development of joint or double degrees.

3.5. The OBHE analysis concludes that changes are occurring in patterns of international recruitment. They also observe that while the transnational education market is currently dominated by the US, UK and Australia, there is evidence of other countries such as Germany, Singapore, Malaysia and India actively pursuing the export of higher education provision overseas. Joint degrees and the offer of programmes in English (particularly at Masters' level) are increasingly evident. The overall picture is one of increasing range and choice for students. As a consequence, the OBHE suggests,

if international provision (wherever located) is to be sustainable, then increasing attention will need to be given both to the quality and relevance of the education provided and to satisfying the expectations and subsequent experiences of students. Internationalisation needs to deliver longer-term - including social and cultural advantages - otherwise economic benefits to institutions and countries will not be forthcoming for long.

Section 4: Desk Research Findings – UK Institutional Responses (Objective 3)

1. Introduction

- 1.1. The impact of increasing 'globalisation' has changed the concept of internationalisation and how it is operationalised in terms of the meanings and rationales of institutions' internationalisation agendas (Knight 2003 op cit. and 2004). These agendas have significant educational dimensions such as 'internationalising' the higher education curriculum to serve the changing needs of students and the global employment market. They also have social, administrative and financial implications, including recognition of the international and intercultural dimensions of services such as human resources, recruitment and marketing, and student support.
- 1.2. In recent years a number of institutions in the UK higher education sector have made significant changes to the organisation and development of their international activities in response to the challenges and opportunities posed by the changing international context (Taylor, 2004). This includes the development of wide-ranging international strategies, the reorganisation of leadership and organisational structures to support international activity, and significant financial investment.
- 1.3. This section uses information gained from published reports, academic literature and publicly available information from institutional web sites to provide an analysis based on the available evidence of how UK institutions are responding to the rapidly changing internationalisation agenda. Institutions were chosen for further investigation based on whether there was evidence of significant involvement in TNE (OBHE), large numbers of overseas students, or a large proportion of the student body was from outside the UK. Care was taken not only to include the most 'visible' institutions that appear to be active internationally, but also to cover institutions that may be active, but that do not publicise their activities.

2. Context

- 2.1. In a recent international survey on internationalisation undertaken by the International Association of Universities (IAU), which received a total of more than 500 responses, 73% of responding institutions indicated that internationalisation was of "high importance" to them, whilst none replied that it was of no importance. Seventy-eight per cent of responding institutions stated that a policy or strategy had been implemented at the institutional level (Knight, 2006).
- 2.2. In many cases in the UK, changes have been reactive and a response to a recent downturn in overseas student recruitment. They represent attempts to manage the impact of greater competition and volatility in the recruitment market through improvements in marketing capacity and intelligence to help maintain and diversify activities and linkages, to avoid an over-reliance just on international student recruitment or large-scale recruitment from a narrow range of countries. The importance of non-EU student recruitment to both institutional finance and academic profile have been highlighted in recent years, and increases in overseas recruitment have meant that in 2004-5 13 UK institutions had more than 5,000 international students (UG and PG) according to HESA. The downturn in the international student recruitment market in 2004-5 (following a particularly successful year in 2003-4) acted as a catalyst for change in the UK higher education sector in relation to international issues.
- 2.3. However, some institutions have also sought to respond more proactively to other impacts of increasing globalisation on the higher education sector, such as increasing international mobility of people and organisations, increasing levels of international collaboration in research and teaching, and the related need for global competencies (e.g. languages, cultural awareness) amongst staff and students. Such approaches may also represent effort by UK institutions to effectively differentiate themselves from their competitors in a competitive marketplace.
- 2.4. Several institutions have already undertaken - or are in the process of undertaking - major reviews and re-orientation of their approach to international activity. This involves the development of, or a re-conceptualisation of international strategy, focus and structures, accompanied by either new or re-configured investment. Plans for significant organisational and cultural change and a re-

balancing of economic and other rationales for international engagement are also part of this picture.

3. Internationalisation and UK Higher Education Institutions

- 3.1. One of the main approaches to restructuring international activity that is now being used by an increasing number of UK (and international) higher education institutions is to attempt to internationalise the whole institution. Institutions in the UK that have followed this approach include Leeds Metropolitan University and the University of Birmingham, whilst many other institutions refer to internationalisation more generally in their international strategies.
- 3.2. The literature on internationalisation and higher education pays considerable attention, first of all, to the concept and definition of 'internationalisation'. De Wit (2002) gives cogent reasons as to why such attention is useful:

"It is not helpful for internationalization to become a catchall phrase for everything and anything international. A more focused definition is necessary if it is to be understood and treated with the importance that it deserves....Internationalization needs to have parameters if it is to be assessed and to advance higher education. This is why a working definition in combination with a conceptual framework for internationalization of higher education is necessary". (p114)

- 3.3. Jane Knight (2004, op cit.) proposes an (updated) working definition of internationalisation that is now widely quoted in the international strategy documents of UK institutions (and outside the UK). It is similar to Ellingboe's definition (1998, quoted in Bartell, op cit.):

"Internationalization at the national/sector/institutional level is defined as the process of integrating an international, intercultural, or global dimension into the purpose, functions or delivery of post-secondary education". (p 11)

- 3.4. Knight and other authors such as Bartell (op cit.) distinguish between globalisation and internationalisation. However, they differ in their views of the relationship between the two concepts; Knight sees the latter as a response to the former while Bartell (following Adler, 1997 and Lapiner, 1994) views globalisation as an advanced phase in the evolving process of internationalisation.
- 3.5. Knight (2004, op cit., p.20) has created a typology of different approaches to internationalisation at the institutional level. Table 2 describes these (and we have added to them from our own analyses).

Table 2: Typology of institutional approaches to internationalisation

Institutional approach	Description of internationalisation
Activity	Activities such as study abroad, curriculum and academic programs, institutional linkages and networks, development projects and branch campuses
Outcomes	Desired outcomes include student competencies, increased profile, more international agreements, partners or projects, competitive advantage
Rationales	Primary drivers including academic standards, income generation, cultural diversity, student and staff development
Process	A process whereby an international dimension is integrated into teaching, learning and service functions of the institution
At home	The creation of a culture or climate on campus that promotes and supports international or intercultural understanding and focuses on campus-based activities
Abroad (cross-border)	Cross-border delivery of education to other countries through a variety of delivery modes (face-to-face, distance, e-learning) and through different administrative arrangements (franchises, twinning, branch campuses)

- 3.6. Knight comments that these approaches are not mutually exclusive, nor do they exclude other approaches. Instead, she sees these frameworks as a means of identifying dominant features of current or future institutional practice. In addition to this typology of approaches to strategy and

practice, de Wit (op cit.) offers a typology of rationales for internationalisation that Knight also updates (op cit.). These are also widely quoted in UK institution's international strategies (they also feature at national level). These rationales are set out in Table 3 (once again, we have added to them from our analyses).

Table 3: Typology of institutional rationales for internationalisation

Rationales	Constituent elements or focus
Social and cultural	National cultural identity Intercultural understanding Citizenship development Social and community development
Political	Foreign policy National security Peace and mutual understanding National identity Regional identity
Economic	Economic growth and competitiveness Labour market Financial incentives Income generation
Academic	International dimension to research and teaching Extension of academic horizons Institution-building Profile and status Enhancement of quality and curriculum development International academic standards Research collaborations
Competitive	International branding and positioning Strategic alliances Knowledge production Knowledge transfer
Developmental	Student and staff development Institutional learning and exchange Capacity building Technical assistance

4. Types of international strategy

- 4.1. Most UK higher education institutions have developed, or are in the process of developing, some form of what could be described as an 'international' or 'internationalisation' strategy. Such strategies represent an attempt to move away from a short-term 'year on year approach' that is still pursued in many institutions to a more comprehensive and integrated approach to the internationalisation of the whole institution that will impact on curricula and methods of delivery, approaches to staff recruitment and staff development. According to Gilligan, it will involve building long term, strategic partnerships with overseas institutions, and include close monitoring of the political environment (Sheffield Hallam University, op cit.).
- 4.2. In some cases, institutions have developed a separate, explicit strategy document that covers the international dimension in detail, whilst in other cases strategic 'international' issues are either covered in a specific section of an institution's corporate or strategic plan or mentioned within other sections of their strategy/plan such as 'academic', 'research', 'teaching and learning' or 'student recruitment' and the strategy is more implicit. In desk research undertaken in 2005, Koutsantoni (2006a, op cit.) found that 69 UK institutions (out of 90 reviewed) made some kind of reference to international activity in their corporate/strategic plan, and 30 had a particular section on international issues within the plan itself. Some institutions (e.g. London Metropolitan University) have sub-strategies alongside their international strategy covering issues such as Europe, collaborative provision and overseas recruitment.
- 4.3. The nature of such strategies differs widely between institutions. Some institutions have produced comprehensive documents running to several pages detailing the international understanding of internationalisation and each component part of the strategy with performance indicators, targets

and areas of responsibility, whilst in other institutions, the international strategy can consist of a series of bullet points or aspirational goals.

- 4.4. One can identify different stages of development in relation to current strategies as identified in Table 4 below.

Table 4 - Stages of institutional international strategy development

Phase	Type	Description
Phase 1	International activity	Disparate and unconnected activities
Phase 2	International strategy	Co-ordination and beginning of alignment
Phase 3	Internationalisation process	Effort to integrate, achieve leverage and added value

- 4.5. Institutions differ in terms of the extent to which they make their strategy publicly available. In many cases this will depend on the availability of the strategic/corporate plan, whilst in others a separate international strategy is more widely disseminated (e.g. Leeds Metropolitan University, Warwick, and Birmingham).

5. Content of international strategies

- 5.1. Institutions' approach to their international strategy is influenced by both their conception of international and 'internationalisation' and their rationale for international activity and/or internationalisation.

- 5.2. Institutions' international strategies are guided by a number of different and sometimes overlapping rationales, which are in turn guided by the institution's mission/vision statement (and values) and the specific objectives contained within the corporate/strategic plan. Some of the main rationales in evidence include:

- Teaching & learning – curriculum design, approach to teaching, opportunities for overseas study, collaborative programmes and research
- Research – capacity building (e.g. staff and student recruitment), developing an international knowledge base, joint programmes, and new funding opportunities
- Cultural – intercultural understanding, diversity, respect, communication (languages), global citizenship
- Reputational – securing international standing and branding (e.g. 'research leader', rankings in world lists)
- Economic/market-led – fees income from overseas student recruitment, generating research funds and consultancy income
- Managerial – an emphasis on organisational efficiency, co-ordination and centralisation to avoid duplication of activity and to maximise viability
- Developmental - capacity building (research and teaching) and assistance in developing countries

- 5.3. It is not uncommon for different parts of the institution, or different departments to have very different rationales for and understanding of the meaning of internationalisation. Conceptions of what constitutes an 'international institution' range from broad to narrow, and this influences the nature and coverage of the international strategy and whether the approach is 'all-embracing' or more superficial. Some institutions have a selective international focus where the institution centres its international activity on one or a small number of area/s (e.g. overseas recruitment, transnational education, research partnerships) whilst others seek to integrate an 'international' dimension within the whole institution, which leads to a more comprehensive description of a range of different international activities and a discussion of the institutional culture or ethos as it relates to international issues. The latter could be described as more pervasive and introducing fundamental change to the institution's outlook and activities, whereas the former could represent simply 'playing at the margins' (Lewis and Luker, 2004).

5.4. The exact nature of institutional strategies will depend on their understanding of the concept of internationalisation, but these strategies typically cover at least some of the following areas of activity that may act as indicators for 'internationalisation' at institutional level:

- Overseas student recruitment
- Overseas presence (e.g. branch campuses)
- Distance learning/e-Learning
- Overseas collaborative partnerships
- Student support and guidance
- Language skills training
- Curriculum reform and pedagogy
- Human resources (staff recruitment, support and reward mechanisms)
- Institutional projects and initiatives (e.g. curriculum content, diversity)
- Administration/organisation of international activities
- Social integration (staff and students)
- Promoting cultural diversity
- International research projects and collaboration
- Student exchange
- Study abroad by UK students
- Knowledge transfer
- Staff exchange
- Opportunities for work experience/work placements in a foreign country

5.5. Some institutions have followed a particular model of, or approach to, international strategy development, for example a number of institutions have been influenced by the work of Jane Knight and Hans de Wit (described above in paragraphs 3.3-3.5) in terms of integrating an international/intercultural dimension into the teaching, research and service functions of institutions (e.g. Leeds Metropolitan, Birmingham, and London Metropolitan universities).

5.6. A detailed investigation of 51 UK international strategies - using a categorisation developed by Knight (2003, op cit.) – by Koutsantoni (2006b) found that all institutions mentioned 'internationalisation abroad' activities (such as international projects and cross-border mobility of people, programmes and providers), whilst 39 alluded to activities that address the international dimension or 'ethos' of the university or 'internationalisation at home' (e.g. internationalise the campus, the curriculum, and the teaching and learning process). She found that references to the 'internationalisation at home' although evident, often lacked detail. For example, only 14 institutions mentioned 'internationalising' the curriculum (e.g. Bedfordshire, Sheffield, London Metropolitan, Salford, City and Essex universities) whilst more collaborative and developmental aspects of international activity, such as not-for-profit international projects (including research collaborations and joint provision of teaching), were only mentioned by 8 institutions. Fourteen institutions mentioned support of international students, although this tends to cover initiatives such as pre-session programmes (EFL and Foundation Programmes), induction programmes, student facilities, and student advice rather than wider issues such as social integration and campus diversity. The latter issues are a particular focus of Bournemouth University which has a Global Perspectives Strategy. European-focused activities such as student and staff exchanges and joint programmes (encouraged under the Bologna Process) receive relatively little attention compared with what would be the case in continental Europe, although London Metropolitan University and UCL are exceptions.

5.7. Koutsantoni (2006a, op cit.) suggests that the focus on 'internationalisation abroad' is largely the result of context and circumstance. Many institutions rely on international (non-EU) recruitment for

their financial and academic viability, and an economic rationale has historically been encouraged by the UK government.

5.8. A number of different strategic approaches are in evidence in UK higher education institutions. These approaches vary in respect of how deeply the process of internationalisation is integrated into the institution. For example, whether international activity is viewed as core or peripheral, whether it is part of the institutional mission and core values, whether the whole of the institution (e.g. staff, departments and curriculum, and pedagogy) is seen as international or just part. For example, the institution could be regionally or locally focused, and the international dimension could be viewed as peripheral (although still relevant). The recent DfES international strategy (see Section) clearly takes a broad view of internationalisation, one which is thoroughly integrated in all aspects of an institution's activities, although as Fielden (2006) points out, many universities are uncertain what benefits a strategy of internationalising all elements of a domestic campus will bring.

5.9. Below is a summary of the different approaches towards internationalisation that are in evidence in the UK:

- Targeted – e.g. particular countries, institutions, regions, focus (i.e. subjects, disciplines, programmes, science park)
- Scattergun/opportunistic – e.g. wide range of countries, sharing risk
- Mutual benefit – e.g. co-operation and mutual understandings with institutions with similar teaching and research profiles overseas. These include 'deep collaborations' with particular institutions (e.g. research, education, staff development, knowledge transfer).
- Separated – an approach without explicit integration between international activities, e.g. separate strategies for institutional collaboration, research, and student recruitment
- Cultural – internationalising the campus via in-depth student and staff awareness and understanding of the importance of the international dimension. This includes integration of international aspects into the curriculum and student support services.
- Building specialist knowledge at senior management team level – e.g. in relation to particular regions or aspects of internationalisation
- Holistic – where the international dimension is integrated into all aspects of an institution's activities for competitive advantage, and where multi-cultural faculty are viewed as a unique or key selling point (e.g. Bournemouth University and Leeds Metropolitan University)
- Niche – focus on particular niche markets

None of these approaches are mutually exclusive, and more than one can be in use by a particular institution.

5.10. Some more detailed examples of strategic foci for international activity in evidence in the UK include:

- Strategic investment in overseas campuses (e.g. Nottingham, Liverpool, Westminster, Middlesex and Heriot-Watt)
- Strategic re-orientation of institutional mission and organisational approach in the UK institution and overseas (e.g. Middlesex, UCL, Warwick)
- Strategic focus on collaboration with private sector partners (e.g. Sylvan, Kaplan, INTI), such as on International Foundation Programmes (Nottingham Trent, Liverpool, Heriot-Watt, Sheffield) or for academic and administrative support for distance learning programmes (Heriot-Watt, Leicester, Liverpool)
- Strategic focus on the development of overseas collaborative provision with a targeted range of international partners (e.g. Central Lancashire, Derby, Northumbria) or with a wide range of partners (e.g. Middlesex, Westminster, Coventry)
- Investment in and development of international consortia and networks to deliver administrative, educational and research benefits as well as benchmarking information: e.g. Worldwide Universities Network (WUN) (e.g. Sheffield, Leeds, York), Universitas 21 (e.g. Birmingham,

Edinburgh, Glasgow, Nottingham), the International Association of Research Universities (IARU) (Oxford and Cambridge) Academic Consortium 21 (AC21) (Bristol, York, Southampton, Manchester, Leeds and Warwick)

- Strategic restructuring and re-focusing of international activity based on detailed financial and political assessment (e.g. withdrawal from transnational provision): Derby, Lincoln, De Montfort, Southampton Solent, Bournemouth
- Strategic investment in distance education and e-learning/virtual delivery: e.g. Derby, Heriot-Watt, Open University, Leicester and University of London External.
- Strategic focus on campus 'internationalisation' including curriculum and pedagogic change (e.g. Birmingham, Bournemouth, Leicester, Salford, Leeds Metropolitan) and the development of a global outlook amongst staff and students (e.g. Bournemouth, Sheffield)
- Strategic focus on developing advice and support for international students, visitors and their families (e.g. Middlesex, Bradford)
- Strategic partnerships with companies and RDAs (e.g. U21 Global, Nottingham Trent, Liverpool, Sussex, White Rose University Consortium)
- Strategic investment and the targeting of resources for international development activities and international student recruitment such as overseas offices (e.g. Middlesex, London Metropolitan, Sheffield), agent networks, and market research
- Strategic development of International Foundation Programmes either in the UK or overseas to generate income and assist with recruitment to degree or master's programmes (e.g. Leicester, Liverpool, Salford, Birmingham, Leeds, City)
- Strategic focus on the Bologna Process and the implications of the European agenda for research and teaching: e.g. European strategy (London Metropolitan, Bedfordshire), Erasmus Mundus Joint Master's degrees (Heriot-Watt, Northumbria, Manchester)
- Strategic focus on developing international consultancy and knowledge transfer activities (e.g. Northumbria).

6. International organisation and management

6.1. Some UK institutions are beginning to focus on their internal organisation and co-ordination of international activity in parallel with the development of international strategies, which sometimes contain explicit reference to the allocation of responsibilities, performance indicators, targets and monitoring and review systems. There is a growing recognition that reporting arrangements and committee structures tend to cut across traditional lines of responsibility and that effective leadership, communication and central procedures are becoming necessary to improve efficiency and to avoid duplication, administrative inefficiency and confusion regarding international activities. This has led to many of the traditional organisational structures related to international activities being reorganised and reconfigured.

6.2. UK institutions have been managing their international activities for many years, formally and informally, usually via a combination of the activities of some form of 'international office' and activities taking place in individual Schools, Faculties or Departments. Until recently such activities tended to be loosely co-ordinated without any central unit with direct responsibility for international activities across the institution. However, there are now a range of organisational structures in evidence within UK institutions that have emerged in response to a growing range of international activities which can include some or all of the following:

- International student recruitment
- International marketing and intelligence gathering
- International strategy development and implementation
- International foundation programmes
- International student support and advice
- Study abroad/student exchange programmes

- International research projects and collaboration
- International consultancy and knowledge transfer activities
- Institutional representation and delegation at relevant international events and fora
- Academic and administrative partnerships with private sector organisations
- Transnational education (e.g. distance learning, overseas campuses, collaborative provision)
- Academic and curriculum development (e.g. joint degrees, curriculum reform, changes in pedagogy)
- International alumni and development activities
- International collaborative partnerships and networks

a) Organisational Structures

6.3. Institutions in the UK currently operate a wide range of different structures for their organisation of international activity. As they respond to the changing external context and internal drivers with the development of a new or revised strategy, different structural arrangements are emerging. Three examples are offered below.

Executive Model

6.4. There is a single focus of leadership that includes membership of the senior management team and executive responsibilities, linked to specific resources. Titles that are emerging include PVC International or Director of International Development. A number of discrete services will report directly to this individual and the senior role will also involve co-ordination and liaison with other key functions and activities across the institution.

Matrix Model

6.5. In this case, leadership is shared with two roles exercising different and complementary leadership roles. The post holders need to be clear about the different leadership requirements and to work closely together. In this case there could be a Deputy Principal, International and External Relations working with a Director, International Services. The latter position carries executive responsibility for strategy implementation and delivery of services while the former carries responsibility for strategy development, co-ordination and liaison and monitoring of strategy implementation. Resources would be allocated to the Executive level through the Deputy Principal role, as well as to other areas of the institution including the academic units.

Co-ordination Model

6.6. In this example, the role and responsibilities of a Pro Vice-Chancellor International or equivalent role is to lead through chairing and co-ordination of a central committee that brings together those with relevant responsibilities and interests from across the institution.

b) Organisational Units

6.7. The main organisational units in evidence in UK institutions are discussed below:

i) International offices

6.8. Most UK institutions have some form of international 'office' which will vary in size and scope depending on the organisation of the institution as a whole and such offices are sometimes also called 'international relations' or 'international recruitment' offices. Some international offices now have around 20-30 staff (e.g. Warwick, Manchester) which can enable them to undertake both strategic (e.g. strategy development and implementation, market research) and student-facing (e.g. advice and guidance) functions. They often help to facilitate the co-ordination between central initiatives and the international strategy and local or school-based activity.

- 6.9. Van der Wende (1999) draws attention to the particular role of the 'International Office' in the context of an 'internationalisation agenda', she highlighted concerns about the relationship between the activities of this office and other central services (such as student recruitment or quality assurance) and concerns about the relationship between the International Office and the academic units in areas of joint responsibility. In institutions where an 'internationalisation strategy' is seen as touching all students and all core functions of the institution (teaching, research and knowledge transfer), the position and role of 'an International Office' becomes a key area for debate.
- 6.10. International offices have historically been marketing orientated and focused on recruitment of overseas students to the UK. Their role often includes activities such as collecting and analysing information on key markets, representation at overseas marketing exhibitions and events, organising interviews, co-ordinating overseas offices and liaising with School/Department recruitment co-ordinators. A number institutions have international office staff with responsibilities for recruitment in different parts of the world, whilst some (e.g. Goldsmiths, Surrey, and Roehampton) have chosen to combine home and overseas recruitment in an enlarged student recruitment section. Interestingly, some institutions are now committed to outsourcing of a large part of the application process for overseas students to an external organisation (e.g. Brunel, Robert Gordon, and UCE).
- 6.11. International offices are also often responsible for student or customer facing functions such as providing students (and their families) with marketing information, advice and guidance prior to their arrival in the UK (e.g. information on immigration, accommodation, fees and financial support) and support on arrival (e.g. meeting students at the airport and orientation programmes). They also organise social and cultural activities for students when they are in the UK, such as visits and international events within the university.
- 6.12. Ongoing support (e.g. counselling, welfare, careers advice) tends to be shared between the international office and the general student support services and the Students' Union (e.g. International Students Associations), although some institutions are developing bespoke international advice teams (e.g. Manchester, Bradford, Leeds), 24-7 online support (Middlesex) or a one-stop-shop service (Bradford) or centre (Leeds, Staffordshire) with seamless support from enquiry to pre-departure briefings and alumni relationships. Some institutions have chosen to integrate support for international students within the general student support structures (e.g. Sheffield, LSE).
- 6.13. Increasingly institutions are providing 'pre-sessional' preparation programmes ranging from short study skills or English language classes to longer International Foundation or pre-Masters programmes.
- 6.14. Some international offices are also involved with study abroad/student exchange and work with individual schools/departments in this area although many institutions now have separate study abroad or international programmes offices with specialist staff with expertise in this area (e.g. Birmingham, Leeds, Westminster). London Metropolitan University, Bradford University, and the University of Bedfordshire have a separate European Office to deal with the particular activities that relate to Europe (e.g. exchange programmes, research partnerships, joint degrees, staff exchanges). London Metropolitan University also has an office in Brussels that is designed to undertake European lobbying activity on behalf of the university.
- 6.15. There is limited evidence of the role that international offices play in providing information and guidance to students enrolled on collaborative programmes.

ii) International partnership offices/sections

- 6.16. The growth of international institutional partnerships and collaborative provision has led to a need for administrative units to support such links. The types of units that are in evidence in the UK include 'international partnerships', 'international programmes' or 'international project' offices/divisions (e.g. Manchester, Westminster, and Central Lancashire). Such units are typically responsible for areas such as consultancy activity, development projects, strategic developments (e.g. transnational links), international delegations, and institutional level partnerships. In some

institutions, however these activities are also the responsibility of an enlarged international office (e.g. Leicester, De Montfort, and Loughborough).

iii) Central international divisions/directorates

- 6.17. Other institutions have chosen to create more comprehensive central units to integrate and coordinate all international activity under one administrative area, such as International Development or International Relations Divisions (e.g. Manchester, Nottingham Trent, Nottingham, Salford, Westminster, Bournemouth, Cardiff, Kingston) where a number of offices (e.g. on recruitment, study abroad and collaborative partnerships) are brought together in one Directorate and cost centre.
- 6.18. Such units are often responsible for the development and implementation of the international strategy alongside relevant PVC's/Vice Principals, although some institutions have created cross-institutional structures e.g. Middlesex International, UCL Global, and Warwick International for this purpose.
- 6.19. Taylor (op cit.) notes that 'a strategy for internationalisation tends toward centralisation in university management' and lists several more reasons for this tendency. These include the costs, and often long-term investments, required, the need to achieve operational efficiency, the complexity arising from diverse activities and needs, particular governance and quality assurance requirements and the need to monitor and evaluate provision and performance. In addition, a more centralist approach may also help to simplify line management structures, improve co-ordination and communication and reduce duplication.

iv) Other areas

- 6.20. It is often less clear how other areas of responsibility that impact upon international activity such as curriculum development, changes in pedagogy, quality assurance (e.g. related to collaborative activity), research support and human resources link together with the more visible activities listed above. Furthermore very few organisations refer to how 'internationalisation' or the international dimension is to be embedded in other strategies, policies and procedures to ensure that it becomes greater than the sum of its parts and that it pervades the ethos of the institution (Lewis and Luker, op cit.).
- 6.21. However, Leeds Metropolitan University has an international faculty which seeks to play an integrative role across the university related to internationalisation, whilst Bournemouth University has developed a Global Perspectives strategy that seeks to help embed global perspectives in the curriculum.

c) Senior management/Leadership

- 6.22. A number of institutions have created new senior management roles to deal with the challenges presented by an increasingly complex internationalisation agenda. The intention in the creation of such roles is often to provide an institutional steer for international activity, and to ensure that such activity is visibly 'owned' from the top down and aligned with the institutional mission/vision and values.
- 6.23. Taylor (op cit.) notes that new senior level appointments often accompany changes in structure. Such appointments are occurring in a number of UK universities. New appointments will have further impact on structure and processes, signalling new reporting arrangements and changes in the membership, terms of reference or role of committees (for example, facilitating a shift from deliberative to executive structures of decision-making and management).
- 6.24. However, such roles are by no means universal, and in her research Koutsantoni (2006a, op cit.) found that only 20 out of 90 institutions appeared to have a top manager responsible for the international(isation) strategy, raising questions about the level of effective leadership and co-ordination of such strategies. In Australia almost all institutions would have a senior manager in such a role, whilst in the UK it appears that Registrars or PVC/Deputy Principal Academic or

Teaching and Learning are often assuming this role alongside their other responsibilities. Given that the international dimension cross-cuts many areas of responsibility it would seem that it is important to co-ordinate activity and measure performance against the key targets set out in the strategic plan, and also to ensure that the entire institution is engaged with and understands the institutional strategy (including all staff and students).

6.25. Where institutions have developed central international units a PVC/Vice Principal is typically directly responsible for these units and the international strategy (e.g. Middlesex, Nottingham, UCL, and Warwick). In institutions with more devolved structures there are often Directors responsible for the promotion, management and development of international activities and strategy. These officers report either directly to the VC/Principal or to another member of the top management team (e.g. Registrar/Secretary or PVC/Vice-Principal). Unsurprisingly, such roles are more common in institutions that are the most heavily engaged in international activity or which recruit large numbers of international students.

7. Strategy development and implementation

- 7.1. It is not always clear how international strategy is developed, implemented, monitored and evaluated in institutions from publicly available information, since this process is often complex and may be informal and iterative, involving a range of actors and stakeholders. Nevertheless, effective strategies require a means to evaluate success and monitor implementation, and it is important for institutions to incorporate these in their strategic planning process.
- 7.2. From the literature, it is evident that the process of strategy development can take different forms. For example, it may form part of the 'normal' institutional planning cycle, as envisaged by Taylor (op cit) or it may be part of a specific and often wide-ranging review (as envisaged by Knight and colleagues (OECD, 1999, op cit.) through use of the IQRP). Alternatively, the process may take place in response to specific circumstances (such as changes in the market-place or the appointment of new senior staff). Our first observation is that the context and circumstances of strategy development will contribute in important ways to shaping the output, a point that is reflected in Sporn's (1996) and Bartell's (op cit.) culture-based frameworks.
- 7.3. Some institutions have established bodies with a particular remit for developing the institution's international strategy, such as working groups, strategy groups and committees (e.g. Cambridge, Coventry, Essex, Sheffield, Central Lancashire, Warwick and Birmingham).
- 7.4. Birmingham has also established an Implementation Board and has appointed a Director with responsibility for the implementation of the international strategy based on the performance indicators and targets outlined in the strategy document. Oxford University has recently created a similar role. Other institutions (e.g. London Metropolitan, UCL and Essex) have outlined clear targets and PIs in their international strategies, but responsibility for implementation is dispersed throughout the university or lies with the relevant PVC/Vice Principal.

8. Organisational Approaches

- 8.1. While each institution's approach, rationale and starting point is unique, below are some general examples of current approaches to the organisation of international activities in the UK HE sector:
 1. Senior-level leadership of reviews of international activity and international strategy and its implementation
 2. Development of a central unit/division/directorate to co-ordinate international activity
 3. Creation of mechanisms for continuing dialogue between senior management and academic units and between academic and professional service units (e.g. international strategy groups, committees, and other fora)
 4. Re-conceptualisation of 'the international agenda' in relation to mission and vision
 5. Alignment and integration of 'international' with other strategies (also as a cross-cutting theme for all strategies) and with systems (e.g. finance and reward systems)

6. Internal re-organisation of roles and responsibilities (e.g. line management) related to the international dimension, and investment in staff development
 7. Integrating an international perspective into wide-ranging initiatives such as the improvement of campus facilities and accommodation, academic reform and improvements to the student experience
 8. Review and development of international partnerships and collaborative approaches (including 'wide and deep' relationships linking a range of academic and business activities) –within the EU and beyond
 9. Engagement in relevant networks, focused intelligence gathering, communication and relationship-building with professional, representative and policy agencies, governments and institutions nationally and internationally.
 10. Participation in benchmarking activities on international best practice related to international activity and student support (e.g. the International Student Barometer, IAU internationalisation survey)
- 8.2. These developments are visible in many parts of the higher education sector, with particular emphases typically reflecting different institutional visions and missions.

9. Summary

- 9.1. This fourth section of the report is focused on a desk-based review of international strategies in UK institutions in parallel with analysis of the wider academic literature.
- 9.2. Evidence from wider surveys suggests that the impact of increasing 'globalisation' has changed the concept of internationalisation and how it is operationalised in terms of the meanings and rationales of institutions' internationalisation agendas (Knight 2003 op cit. and 2004 op cit.). New agendas for internationalisation have significant educational dimensions such as 'internationalising' the higher education curriculum to serve the changing needs of students and the global employment market. They also have social, administrative and financial implications, including recognition of the international and intercultural dimensions of services such as human resources, recruitment and marketing, and student support.
- 9.3. The evidence collected in this project, in combination with other studies such as that of Taylor (op cit.) firstly suggests that greater numbers of international strategies or international aspects of corporate strategies are being developed by UK institutions. In cases where such a strategy has existed for some time, there is evidence of significant review and re-orientation in progress. Secondly, institutions are pursuing a diverse range of approaches to 'international activity' and 'internationalisation'. This is reflected in different rationales for international engagement as well as different strategic responses and levels of investment. Analysis beyond the UK of institutional-level international engagement (for example, through recent surveys by the International Association of Universities in 2003 in 2005) also highlights the growing importance of internationalisation and international engagement in other countries and regions. As discussed earlier, the primary motivations for change in UK institutions appear to be economic and competitive, with some proactive responses to the wider impacts of globalisation.
- 9.4. This section records a definition of internationalisation that is widely used in institutions - in the UK and beyond:
- "Internationalization at the national/sector/institutional level is defined as the process of integrating an international, intercultural, or global dimension into the purpose, functions or delivery of post-secondary education" (Knight, 2004a).
- 9.5. De Wit (2002, op cit.) suggests that it is necessary to define the meaning, rationale and activities associated with internationalisation in order to clarify purposes and measure progress and outcomes. The concept is drawn out further through various indicative typologies that cover internationalisation approaches, rationales and activities. These can be found within institutions' strategies and are useful for other institutions in developing their own approaches.

- 9.6. The typologies provide a useful backdrop for our own findings. We highlight stages of development in institutional strategies, types of strategy, the content of strategies in headline terms, and strategic approaches to internationalisation. We also give a range of institutional examples to illustrate different kinds of institutional response.
- 9.7. This section also focuses on the organisation and management of international strategies at central and academic unit levels, noting changes as well as different approaches within institutions. The analysis identifies different structural approaches and physical arrangements such as central units (an international office, an office for international partnerships) or broader international divisions and directorates. We also identify the emergence or extension of senior level responsibilities to lead and co-ordinate internationalisation agendas, while noting that this is not universal in UK institutions. By contrast, all Australian institutions have senior level positions devoted to the development, delivery and enhancement of international strategies.
- 9.8. The final part of this section focuses on the processes of strategy development and implementation. The principal sources of evidence are the wider academic literature and the institutional case-study within this project since the published institutional strategies of UK institutions do not generally reveal such detail. Both the processes of strategy development and strategy implementation can take different forms and a key observation from our study is that different forms may have important consequences for outcomes. The last part of this section offers a general summary of current activities at institutional level that reflect UK approaches to internationalisation.

Section 5: Case Study Observations (Objective 6)

1. Introduction

- 1.1. The purpose of the primary data collection phase of this research was not to test a hypothesis about internationalisation in institutions or to evaluate a particular theory, but to test and adapt a quality review tool. We wished to find out whether the tool itself and the associated investigative process could be used by other institutions in the UK to develop, assess and enhance their international strategies, particularly in relation to the experience of international students. In the course of refining and using the tool, we did, however, gather data about the development of an international strategy, views on that strategy and the drivers behind it, and the links between strategy, practice and the experience of international students.
- 1.2. The detail of the institutional interviews is not part of our report to the Academy and we cannot generalise our findings based only on one detailed case-study. Nonetheless, we have gathered useful data that are potentially illuminating and of wider interest. Therefore, in this section, we highlight issues that we believe to be of general interest to other institutions and researchers. These issues either resonate with the wider literature, or with our secondary data on other institutions; alternatively they suggest potential differences with either of these sources. We have deliberately headed this section, 'key observations', rather than 'research findings'.
- 1.3. Presentation of our key observations broadly follows our interview structure, which in turn reflects the structure of the IQRP and our adaptation of this tool (see Appendix 1). In presenting our observations, we have adopted an 'organisational development' perspective on the theme of internationalisation in an institution.

2. Strategy: development, documentation and engagement

- 2.1. This research project offered a useful mechanism for the institution to review its approach to 'international activity' and to explore what 'internationalisation' might mean conceptually and in practice. The timing of the project coincided with other triggers for action, both internal (an analytical paper on international strategies had already been presented to the Planning Committee) and external (a downturn in international student recruitment required an urgent response). Soon after the start of the project a new strategy document was produced and confirmed at executive and governance levels.
- 2.2. Our analysis of internal documentation enabled us to trace the evolution of the new strategy document and to identify previous contributions developed in different parts of the central administration, at different times during an eight-year period, and for different purposes. The earlier documents reflected the particular perspectives of their originating department and the operational pre-occupations of the institution at the time (for example, focusing on European initiatives or on institutional partnerships in Europe and beyond). In Jane Knight's terms (2004, op cit.), these earlier documents are about international activities and do not represent a 'process of internationalisation'. The authors could be described as specialists in their areas, rather than as 'generic' institutional managers or as representative of the academic units.
- 2.3. The new document (an International Strategy) was different from its predecessors in several ways. Its focus was broader than in the past, its authors were part of the senior management team and there was a closer relationship envisaged between activity initiated at the centre and that initiated in the academic units. The document also contains institutional aspirations, targets and success criteria. It makes clear reference to the external context as a driver for change. While the strategy was initiated from the centre, there was also evident pressure for the development of an international strategy with a clear direction and priorities from several of the academic units. This mirrors developments in other institutions and highlights the strategic focus on the international agenda that is occurring in many UK institutions in response to a changing external context as described in Section 4 above.

Strategy development process

- 2.4. From our analysis of the strategies of other institutions, it is not clear whether the new or updated 'international strategy' is a live agenda that guides action across all parts of the institution or a formal document that informs the operations of specific parts of the institution. In our own case-study, the time-table for producing a new document did not allow for wide-ranging institutional debate. However, the Academy project methodology did provide a vehicle for reflection at different levels of the institution and internal dissemination processes will extend this opportunity. Our observation here is that the timing and circumstances of the strategy development process (and associated consultation and debate) will have an impact on the level of engagement with any process of internationalisation across the institution.
- 2.5. Institutional research and review as well as management development processes are potentially useful in offering a 'communication bridge' between a formalised strategy development process with limited potential for engagement and the subsequent requirement for widespread implementation of new practices. Indeed, writers on organisational development in the corporate sector would argue that in a 'mature' organisation, management development processes enhance the nature and quality of corporate policy forming processes which they also inform and help implement (Burgoyne, 1988). Strategy development is viewed as a learning process.
- 2.6. Other writers see strategy development as part of a continuing dialogue which links purpose, direction, values and ideas. Engagement is crucial: "People value work that makes them feel valued. When *they* make strategy, they matter. And *they* own the results, so effective execution is more likely" (Manning, 2001, p5, author's italics). These arguments echo the literature on 'managing change' (Kotter, 1990, and Kotter and Cohen, 2002) where the message is 'consult, communicate, connect' (Molloy and Whittington, 2005, p14) if strategy development is to lead to successful realisation and implementation.
- 2.7. Text books on corporate strategy (Johnson and Scholes, 2002) offer different lenses through which to view strategy development and these are linked to assumptions about organisations, the role of top management, the implications for change and underpinning theories (p.60) as Table 5 below illustrates.

Table 5: Elements of institutional strategy development

Strategy as ...	Design	Experience	Ideas
Description	Deliberate positioning through rational, analytic, structured and directive processes	Incremental development as the outcome of individual and collective experience and 'the taken for granted'	Emergence of order and innovation through variety and diversity in and around the organisation
Assumptions about organisations	Mechanistic, hierarchical, logical	Cultures based on history, legitimacy and past success	Complex systems of variety and diversity
Role of top management	Strategic decision makers	Enactors of their experience	'Coaches', creators of context and 'champions' of ideas
Implications for change	Change = implementation of planned strategy	Change is incremental, with resistance to major change	Change incremental but occasionally sudden
Underpinning theories	Economics, decision sciences	Institutional theory; theories of culture; psychology	Complexity and evolutionary theories

3. Leadership

- 3.1. The development and implementation of strategy is closely associated with leadership. As Peters and Waterman (1982) have argued, "an effective leader must be the master of two ends of the

spectrum: ideas at the highest levels of abstraction and actions at the most mundane levels of detail" (p287). The expectations that are associated with the role and responsibilities of senior leaders and their exercise of leadership involve strategy creation, gaining organisational credibility for the strategy and 'making it happen' by focusing the energy and attention of individuals and groups on strategy implementation. A widely accepted description of leadership is a process of social influence that guides a group towards goals (Bryman, 1986).

- 3.2. Our case-study highlighted the importance of leadership for strategy development and implementation. There was an expectation at all levels of the institution - from academic units to central services - that strategy development needed to be *initiated and subsequently confirmed* by those in leadership positions, although ideas, experience and views should come - and be sought - from across the community. Furthermore, there was an expectation that it should be 'driven forward' through the exercise of leadership at the centre of the institution, in association with leadership at other levels and points in the organisational system. Once again, there are echoes of the wider literature on the role of leadership in relation to organisational change (Kotter, 1990, op cit; Beckhard and Pritchard, 1992). It is important to note that this literature also focuses on styles of leadership and successful change; this was not a specific focus of our research, but an issue that emerged.
- 3.3. We suggest that there are a number of reasons why leadership at the senior management level is specifically necessary for successful development of an international - or internationalisation - strategy for an institution. The reasons include:
 - The significance of the international agenda for institutions in the light of the external operating environment. Leadership is needed to challenge the status quo and to establish sufficient credibility to carry people forward with ensuing changes in practice (Kouzes and Posner, 1987; 1992)
 - The dispersed nature of international activities and of 'internationalisation' more broadly. An international strategy for the institution, and more particularly, a process of 'internationalisation', touches many parts of the institution including student-facing services (student recruitment, student support), general support services (finance, library, HR, Registry), specialist and academic units (international office, alumni relations) and research, teaching and knowledge transfer functions. Leadership is needed to focus the agenda and to focus attention (Bennis and Nanus, 1985). The style of leadership is also important since this international agenda (or internationalisation process) needs to be incorporated into other strategies and to be aligned with the majority, if not all, functions of the institution. In other words, territorial and resource boundaries will be crossed and a political process of negotiation will be needed. Credibility, authority and power at senior management level are crucial for success.
 - International activities have historically been generated from different points in the institution, for example, by individual academics or groups (for research collaborations), by departments and central units (for staff and student exchanges) and at institutional level (for strategic partnerships). Leadership has therefore been exercised at many levels. Strategic leadership is needed for co-ordination, direction-setting, focusing attention and for engaging with leaders at different levels; ultimately it is necessary to ensure that the whole is greater than the sum of the parts.

4. Structure

- 4.1. In our analysis of institutional strategies, it was clear that revised or new strategies were often associated with changes in structures. These changes were both substantive - involving new functions or new configurations of existing functions - and symbolic, signalling internally and sometimes externally the level of importance or priority attached to a function or set of functions. Although this section is concerned with structure, it is important to recognise that structure is only one part of 'an organisation's configuration', which overall consists of the 'structures, processes, relationships and boundaries through which the organisation operates' (Johnson and Scholes, op cit, p420).
- 4.2. An important operational challenge in moving from an 'international activity' approach to an 'internationalisation process' approach (Knight, 2004b) is that existing international activities may be dispersed across an institution and will need to be re-configured. For example, recruitment may be

separated from student support services, alumni relations may be separated from services for current students, Marketing is likely to be a separate department from Registry and some aspects of any of these functions will be done centrally and some within academic units. There may also be an International Office that focuses on the needs of international students, some of which may overlap with home students. In UK institutions 'home and EU students' are typically counted as the same (for financial reasons). This may obscure those needs that they share with other non-UK domiciled students.

- 4.3. Taylor (op cit.) notes that new senior level appointments often accompany changes in structure. In our case-study, several kinds of structural change were evident, including the disestablishment of some committees, the creation of a new one, and a shift to more executive responsibility for aspects of the international strategy and a regrouping of functional units.
- 4.4. There are parallels with the debates about quality and quality assurance in institutions in the 1990s. For example, is internationalisation everyone's business? Should it therefore permeate all levels and functions (with no central focus) or is there a case for a central focus for students, staff or for external partners? Institutions are clearly addressing these issues and are creating different structural solutions from functional to matrix, team-based structures and 'one-stop shops'. Our observation from the case-study is that the reality may contain a mix of different structures alongside other co-ordinating roles. These co-ordinating roles may be necessary to resolve conflicts, assist communication or act as a focus for debate and analysis of options. On the other hand, if roles and boundaries are unclear or relationships poor, there may be conflict or duplication between executive and co-ordinating roles (for example, between a Pro Vice Chancellor and a Director of International Development). The impact on practice can be significant where a lack of clarity about structures (and roles) exists with staff or students reporting confusion, duplication or outright conflict.
- 4.5. Closely related to structure are issues of responsibility, accountability, line-management arrangements and resources. Our observation is that these issues need to be clarified in line with changes in structure. In our case-study, a comment from a Students' Union representative highlighted the importance of the relationship between these factors when praising recent developments. A new committee brings together all Heads of Services that have an impact on students' social and environmental needs. Because responsibility, accountability and access to resources were aligned, decisions could be swiftly taken and translated into action, with a positive impact on international students' experiences in key areas of concern to them. Where there is a separation between any of these issues (for example, where strategic responsibility is separated from operational line-management, accountability or resources) then it can be difficult 'to get things done' or 'make things happen'. The impact on practice and experience is evident; there is also an impact on perceptions of the effectiveness of strategy and leadership.

5. Systems and processes

- 5.1. Structures are a key part of the architecture needed for effective organisational functioning, but as important are core infrastructure functions such as human resources, finance, IT or Planning and the formal systems, rules and procedures that flow from them. One can also include Governance as a function and formal process in this context. Informal organisational processes (such as culture and cultural processes of influence, routines and symbols) are also part of this picture. Both formal and informal processes can act as instrumental or social controls on the workings of the organisation; they can therefore help or hinder the translation of strategy into action.
- 5.2. In our case study, the instrumental controls that we noted where, for example, planning systems and resource allocation methodologies (RAM) that guided behaviour in particular ways (perhaps to recruit large numbers of international students, or to do more or less distance learning depending on the incentives involved). HR processes for the recruitment, selection and reward of staff are also significant.
- 5.3. The strategic importance of the international agenda (and the challenges associated with the changing context) make good governance a central issue and one where the Governing Body may need to become more involved and better equipped to exercise judgement about reputational and financial risk. Another area of critical importance - and one where problems are often encountered

in institutions - is the area of data collection and information sharing across functions and activities. Given the dispersed nature of international activities, any strategy for internationalisation is dependent on alignment of systems and processes and the sharing of information across structural, IT and social system boundaries. We would suggest that one of the major differences between an institution that is engaged in a range of international activities and one that is seeking to develop a 'strategy for internationalisation' is that fundamental rather than incremental change is likely to be involved. As such 'alignment' is a key organisational concept (Beckhard and Pritchard, op cit.) and will require:

- Changes in roles and relationships
- Changes in human resource policies and practices
- Development of an information system that is aligned to the changing circumstances and conditions
- Financial management and controls that are similarly aligned
- Governance arrangements that are clear about risk and reward balances and the management of both.

6. Relationships, boundaries and the question of integration

6.1. Where alignment of systems and processes implies 'working together or in the same direction', a still closer relationship of 'integration' may need to be achieved for knowledge, experience and activities across the organisation, horizontally and vertically - and externally - with other organisations. Structures and processes are part of this configuration, but equally important are boundaries and relationships if degrees of 'alignment' and 'integration' are to be achieved between strategy, practice and satisfactory experiences.

Integration across functional, structural and organisational boundaries

- 6.2. Internal boundaries describe functional demarcations and demarcations between individual roles. External boundaries are also important in relation to internationalisation strategies as several institutional examples demonstrate, including the outsourcing of aspects of international student recruitment to other organisations, the sharing of services (such as international agents or centres) and the development of strategic alliances with institutions or businesses in other countries. Where demarcation can create useful separation, relationships are needed to build communication, liaison and operational integration. The use of IT systems definitely assists, but does not substitute for face-to-face communication or relationships built on trust, common understandings and shared commitment. To 'internationalise an institution' requires higher levels of integration than an activity-based approach where individual independent action may suffice to deliver specific outcomes - or other situations where functions need only to be loosely co-ordinated.
- 6.3. In our case study we noted a number of different boundaries which were potential or actual barriers to the integration of needs, activities and actions relating to 'internationalisation'. The building of relationships across these boundaries is needed, through structures, processes and communication mechanisms. The boundaries include those between: central services and services located in the academic units; professional services and academic functions; senior managers and other levels of management; managers and operational staff; different sets of support functions; and barriers between students and staff and student officers and departmental managers.
- 6.4. A positive and effective link between strategy, practice and the experience of international students can only be developed, we suggest, if attention is given to integration across boundaries, with the express purpose of building effective relationships and good communication habits. Creating opportunities for discussion, mechanisms for sharing information and experience and for acting on ideas, and facilitating collective decision-making are all needed. Where these were happening, positive outcomes were reported.

Integrating knowledge and information

6.5. The context of internationalisation is also relevant to the issue of integrating knowledge and information. As has been described earlier, the global context is one of competition, complexity and speed of communication. In this context, acquiring knowledge, sharing information and integrating the two to create new opportunities is critical. External liaison and networking as well as monitoring of the national and international policy and institutional context are also important, as many of our respondents recognised. However, such liaison and networking is not necessarily practised systematically nor is it part of formal expectations of specific individual roles. From our analysis, we note the need for more sophisticated and extensive knowledge management systems and information management processes to support 'internationalisation'. Such systems should facilitate better deployment of resources, more informed decision-making and help to create common understandings and wider engagement with the challenges of internationalisation.

Integration of strategies and policies

6.6. Knight (1994b, op cit.) highlights the need for 'integration' in relation to 'internationalisation as a process'. For her, the concept of integration denotes the need to embed the international or intercultural dimension into policies and programmes if it is to be central and sustainable within the institution. Knight and de Wit (1997) and Ellingboe (op cit.) include integration in their definitions of internationalisation for similar reasons. Taylor (op cit.) refers to the challenges of integration, in his case referring to the interaction between international or internationalisation strategies and other strategies such as HR, finance, teaching and learning or research. Bartell (op cit.) highlights the challenges to integration that are associated with different understandings or disagreements about the concept or application of 'internationalisation'. These authors draw attention to the ideal of integration as well as the difficulties of achieving it in practice.

6.7. In our case study, 'integration' was one of the key operational challenges. Underlying the challenges, we noted a series of organisational dilemmas including a need for balancing:

- Devolution and centralisation
- Standardisation and customisation of processes
- Vertical accountability and horizontal liaison and exchange
- Formal structures and relationships and informal ones
- Acquiring or creating knowledge and sharing it across boundaries
- Social and professional control systems and managerial control systems
- Specialisation and integration of knowledge and services
- Facilitating initiative (empowering) and retaining strategic control (including 'holding the ring').

6.8. These dilemmas are not exclusive to the development of an international strategy, but this process sharpens the lens on some of these issues because of the challenges of, and need for 'integration'.

7. Internationalisation

7.1. Our case-study illustrated clearly the existence of a variety of views on the concept, practice and rationale for internationalisation. At one end of the spectrum some respondents saw the term as 'meaningless', for others the concept was meaningful and useful for describing how to make a strategy operational. Some of the components listed in the two typologies emerged through the research process; in other cases, examples were used as prompts for reflection and were useful in identifying new ways of addressing 'internationalisation' for some respondents. We note the value of using these typologies to raise awareness and create debate; at more advanced stages of institutional development, they may also be useful in evaluation and benchmarking processes.

7.2. Debating, clarifying and confirming institutional rationales for internationalisation, we suggest, is particularly important because of the link between vision, mission and values. By debating the rationale and drivers behind institutional strategy, institutions can address important questions of

identity, aspirations and risks including: 'who or what do we want to be - or not to be?' These questions inform strategic choices and illustrate alignment (or lack of alignment) with institutional values.

- 7.3. A number of authors focus on values, beliefs and identity as attributes of 'culture'. The concept of culture offers a holistic framework for other aspects of organisational functioning (such as those described above) but with the addition of behavioural and symbolic elements (Deal and Kennedy, 1982). Further connections are made between dimensions of organisational culture and organisational effectiveness (Cameron and Freeman, 1991). Sporn (op cit.) demonstrates the importance of culture in shaping management and strategy in higher education. For her, 'strength of culture' is defined as "the degree of fit between cultural values, structural arrangements and strategic plans within the whole university" (p.50). Strength in this context denotes active encouragement of debate and discussion of diverse views in order to enhance problem solving and the quality of decision-making. We would observe from our case study that the dimension of organisational culture is important in framing strategy and responses to strategic intent. Bartell (op cit.) specifically applies a cultural framework to the topic of internationalisation, making links between the external environment, internal culture, the functioning structure and related strategies. The concluding paragraph of his paper neatly draws together the constituent elements of the organisational picture that we have attempted to create in this section:

"The internal culture can be inhibiting or facilitating and therefore, to enhance the effectiveness of any substantive, and not merely token, internationalization process, the leadership's role is to foster and link a culture congruent with the internationalization objective and the management of the university, including resource allocation and control techniques. To this end, the task of university leaders would include the identification of internal contradictions and the design of appropriate solutions as well as the clarification and communication of the university's identity relative to its external environment". (p67)

- 7.4. The gloss, or the caveat, that we would add to Bartell's conclusion is that 'leadership' is widely dispersed across higher education institutions, whether exercised through formal or informal systems. Given the devolution that is common between central administration and academic units in many institutions, the leadership that needs to be exercised at each level is different in kind. There are similarities here with descriptions of strategy at corporate and business unit levels. Where the centre's role is to initiate, guide, establish rules of engagement and confirm priorities, the leadership task at academic level is to identify specific opportunities with direct benefits for the unit and institution.

8. Summary

- 8.1. This fifth section of the report provides a series of observations arising from the institutional case study in the context of the wider literature. The detailed findings from the case study were reported separately to the case study institution and are not included in this Academy report. From the Academy's perspective, the key purpose of the case study was to test and refine an institutional review tool that could be used by institutions to review and enhance their approach to internationalisation and international students' experiences of UK higher education. The observations made in this section are intended to offer some pointers towards quality enhancement. They represent an 'organisational development' perspective on the theme of internationalisation in an institution, linking strategy development to strategy implementation, through to the experience of students.
- 8.2. The project provided a useful vehicle for the institution to review its approach to the international agenda. A number of features were important to achieve this outcome including timeliness of the project, the opportunity to review early documentation and compare it with a new strategy, the structure and content of interviews with staff and student representatives (building on the IQRP) and the subsequent reporting and dissemination mechanisms at different levels of the institution.
- 8.3. Analysis of the strategy documents and the strategy development process enabled observations to be made about the evolution of the university's strategies, the content and scope of the new international strategy and how the development process and the strategy engaged and was received by respondents. Reference to the wider literature points to the importance of engagement

of key constituencies if implementation of strategy is to be achieved effectively. The case study also revealed the need for and expectation of strategic leadership to be exercised for co-ordination, direction-setting, focusing attention and for engaging with leaders at different levels of the institution to ensure that the whole of the internationalisation agenda is greater than the sum of the parts.

- 8.4. As in other institutions, movement from 'international activities' to 'an international strategy' required a re-configuration of existing structures including new posts and roles. The main observations in this section included a need to adopt clear structures and roles and to ensure that these are widely known and understood, with good communication and co-ordination between strategic and operational roles. The symbolic importance of structures was also noted, in relation to the titles of units and the messages that this sends about institutional priorities. Other research points towards the tendency for the process of 'internationalisation' to require greater centralisation of structures while ensuring alignment between centre and academic units. A further point noted by student representatives was that swift decision-taking and responsiveness to student needs was increased where responsibility, accountability and access to resources were aligned in structural terms.
- 8.5. Realignment of structures also needs to be linked to changes in systems and processes. A number of these were identified with reference also to the wider literature. The alignment of these systems involves a significant change agenda since the main systems and processes affected include: changes in human resource policies and practices; development of an information system that is aligned to the changing circumstances and conditions; financial management and controls that are similarly aligned and governance arrangements that are clear about risk and reward balances and the management of both.
- 8.6. Integration was identified as a key aspect of moves towards 'internationalisation'. This covers a number of dimensions from 'working together or in the same direction' to integration' of knowledge, experience and activities across the organisation, horizontally and vertically - and externally - with other organisations. The section briefly considers integration across functional, structural and organisational boundaries, integration of knowledge and information, and integration of systems and policies before highlighting a number of common organisational dilemmas.
- 8.7. The section concludes with an analysis and discussion of 'internationalisation' as a concept, noting the various interpretations of this concept in practice in the institution and in the wider academic literature. The typologies available were useful in promoting discussion and debate about internationalisation and its specific interpretation in the institution. In more general terms, analysis and discussion about internationalisation ensures that the process is connected with institutional culture, values, identity and aspirations.

Section 6: Research Findings – The International Student Experience (Objective 4)

1. Research on the Experiences of International Students in the UK

- 1.1. UK higher education institutions, sector bodies such as UKCOSA, and government departments are increasingly concerned that the overall experience of international students will affect their perceptions of the quality and value for money of their stay and will affect 'word of mouth recommendations'. Given the cost of their study there is a key issue of meeting/managing expectations of international students to ensure that they have valuable study experiences in the UK.
- 1.2. In a report of a literature review, published in 2003 by UKCOSA, Leonard, Pelletier and Morley (Leonard et al., 2003) concluded that their review of recent research had highlighted a lack of institutionally-focused studies that link policy, strategy and practice in relation to international students in the UK, particularly on the impact of the increasing numbers of international students on the process and content of educational activities.
- 1.3. However, in the UK, 'the student experience' has recently been given a particular status and focus because of two national developments. The first, in 2004, was the establishment of a newly configured quality enhancement agency, the Higher Education Academy, which has 'the student learning experience' as a core focus for its activities and services. The second development was the launch in 2005 of a National Student Survey.
- 1.4. As with 'the international dimension' in institutions, the national agenda has had an impact on internal institutional arrangements and actions. In recent years there have been a number of research studies that have focused specifically on investigating the experience of international students studying on UK higher education programmes. These studies were designed to help institutions improve their services and support for their international student body
- 1.5. Recent research includes studies that focus particularly on international students such as the 2004 UKCOSA Survey 'Broadening our Horizons' (in association with the British Council, Universities UK, and the Standing Conference of Principals) (UKCOSA, 2004) and the ongoing International Student Barometer benchmarking research by I-Graduate (2005 to present) as well as findings from more broad-based surveys such as the Ipsos Mori/UNITE Student Experience Survey (UNITE and UKCOSA, 2006) and the National Student Survey which contain a sample of international students.

a) UKCOSA "Broadening our Horizons" Survey (2004)

<http://www.ukcosa.org.uk/survey/report.pdf>

- 1.6. In the autumn of 2004, UKCOSA, in association with the British Council, Universities UK, and the Standing Conference of Principals published a report on the first major survey in the last 10 years on the experiences of overseas students in UK higher education. It surveyed nearly 5,000 students in 181 FE and HE institutions and from 150 countries. It was intended that this will survey will be conducted regularly to help institutions benchmark themselves against others, and to help them develop their student support services.
- 1.7. The research found that the majority (89%) of international students studying in the UK were satisfied or very satisfied with their overall study experience, and they were particularly happy with the academic aspects of their stay (e.g. the quality of teaching and academic facilities). However, international students' responses to questions about particular aspects of their study experience highlighted a number of issues that should be of concern to the UK higher education sector, including:
 - Only 50% of international students thought that their period of study was good value for money
 - Students were less impressed with the accommodation arrangements and the cost of accommodation

- Students would welcome more information pre-arrival that can help them prepare for their stay (e.g. information on culture, cost of living, local area, customs, organisational issues)
- Many students were concerned with a lack of social integration with UK students, and a lack of contact with local people. The report suggests that institutions and staff could do more to help this process through promoting cultural diversity for, and with, both staff and UK students.
- There is a perception that support services are under-resourced, and that staff are unable to assist students with more than basic induction programmes or organisational issues (e.g. personal support, organising social activities, answering queries)

b) International Graduate Insight Group (I-Graduate)

1.8. A number of UK institutions are currently involved in a benchmarking network organised by I-Graduate, the International Student Barometer (<http://www.i-graduate.org>) that aims to assist institutions with strategy and planning, risk assessment, recruitment, delivery and relationship management related to international student issues through research tools that provide insight into the student market, such as:

- Intelligence reports from target markets
- Syndicated focus groups amongst target nationalities by subject area
- Worldwide Agent Evaluation Programme
- Alumni Insight Programme
- Alumni career mapping software

1.9. Potentially the most useful service I-Graduate provides is its International Student Barometer (ISB) a multinational collaborative study mapping student expectation and experience by nationality and subject area over time. It is a risk management tool that isolates the 6 key drivers of international student satisfaction and establishes the relative importance of each (as understood by students). Its Student Satisfaction Index assesses links between issues and other variables (e.g. nationality, subject, countries, and background) and variance within the international student population. Institutional data can be compared with benchmark data from other institutions.

1.10. The first wave of research took place in November 2005 with more than 18,000 international students, and found that most international students were happy with their education, although the researchers pointed out that institutions could not afford to be complacent about the minority who had unresolved problems, and that these need to be identified and resolved quickly by academic and support staff to avoid such students influencing the perceptions of future students through negative feedback (e.g. via internet forums and web logs). Of particular relevance is the need for academic staff to develop skills in handling the cultural complexities of communicating effectively with students from different countries. A fifth of complaints received by the Office of the Independent Adjudicator for higher education last year were from overseas students, who make up only a tenth of the UK student population (Tysome, 2006).

c) IPSOS Mori/UNITE: The International Student Experience Report (2006)

<http://www.mori.com/polls/2005/unite-international.shtml>

1.11. The UNITE International Student Report is a spin-off from the original UNITE Student Experience Report that Ipsos MORI has been running for six years. In Autumn 2005, Ipsos MORI conducted 30 minute face-to-face interviews with 1,025 full-time undergraduate and post-graduate students, and an additional 357 interviews with international (EU and non-EU) students in 20 institutions in the UK. Around 60% of the international students were from outside the EU (UNITE and UKCOSA, op cit.).

1.12. The report reflects many of the key conclusions drawn from the earlier UKCOSA survey, namely the high satisfaction expressed by international students with their overall study experience and the quality of teaching, the need for universities to improve and resource their support services

(especially careers, welfare and accommodation) and the need to encourage greater mixing between international and UK students. As in the UKCOSA survey, the social and accommodation (particularly cost) aspects of campus life were less highly rated by international students, and many find it hard to adapt to UK culture.

- 1.13. The Ipsos MORI research complements the UKCOSA research by focusing in more detail on the characteristics and interests of international students, and compares these to home students. For example, the research highlights that international students are generally older, over half of international students (52%) spent nothing on alcohol in a typical week, and that they are more likely to read and use the internet than UK students. They are also more likely to be interested in the cultural experience of their study than their UK peers, such as meeting and mixing with people from other cultures and finding out about the social and cultural provision in their local area. Interestingly, 43% of international students expect their period of study to provide them with an international perspective, compared with only one in five of UK students.
- 1.14. International students also reported lower levels of expected indebtedness than UK students, suggesting that they may have access to more financial support than their British peers, although 40% of international students still cited financial issues as the worst aspect of university life.

d) National Student Survey (NSS)

<http://www.thestudentsurvey.com/>

- 1.15. The National Student Survey (NSS) is an on-line survey of final year undergraduate higher education students in England, Wales and Northern Ireland. It was commissioned by the Higher Education Funding Councils (HEFCE, HEFCW and DEL) and is carried out by Ipsos MORI. Two surveys have taken place to date, one in 2005 and the most recent survey in 2006. To date there has been no published analysis of how the findings from international students compare with those from home students, although international students were included in the sample. This may be due to the fact that the numbers of responses from international students were insufficiently large in each institution to make the findings statistically robust.

e) Summary of findings from international student experience research

- 1.16. The findings from the research cited above are remarkably consistent, and suggest that although most international students are happy with their overall experience, the quality of the teaching and course content, they are less satisfied with the value for money of their study experience, and some of the social and administrative dimensions, and the levels of personal and academic support received.
- 1.17. However, the research does not provide enough evidence to identify which are the most important factors, or those which drive student choice or satisfaction. Anecdotal evidence suggests that these are largely related to the academic quality of the course (e.g. teaching, course content), however more detailed analysis is required in this area, and other factors may also be more important than is currently believed.
- 1.18. Although international students face many of the same issues as home students, they are also transferring from one culture to another and require access to focused and practical help to meet their particular needs and to improve their study experiences. Students studying via transnational provision will also require different types of support, and this will need to be organised and evaluated in association with partner organisations.
- 1.19. An analysis of the findings from the current research on the international student experience highlights a number of dimensions that influence the study experience that are particularly important for international students. These are summarised below:

Environmental factors

- Cost of living

- Campus atmosphere – friendliness of students and staff, security, pleasant environment
- Adequate and culturally appropriate campus facilities (e.g. coffee shops rather than bars)
- Local town – friendliness, appearance, facilities, distance
- Suitable and comfortable accommodation

Academic factors

- Pedagogy – e.g. teaching styles, assessment methods, modes of delivery, plagiarism regulations
- Employability – reputation and relevance of courses/programmes
- Recognition of, and support/training for, language difficulties and problems with approaches to study
- Academic resources - e.g. library, laboratories
- Academic support from tutors – tutoring styles, feedback

Administrative factors

- Support with immigration issues (e.g. visa extensions)
- Employment opportunities and careers support
- Experiences of contacts with key university offices (e.g. Registry, Accommodation, International Office, Health Centre)

Social factors

- Personal support
- Opportunities for social and cultural integration
- Appropriate social activities and events
- Cultural awareness of both staff and other students

1.20. Some of the £6m of funding for the second phase of the Prime Minister's Initiative for international education (PMI) will be used to improve the experience of international students in the UK. Working with UKCOSA, the stakeholders will work towards helping to support a better focus on the quality of the student experience (e.g. academic support, social integration, cultural experiences) and measures to assist students to gain employment and work experience both during and after their period of study, such as careers advice, linkages with international employers (in the UK and overseas), and opportunities for work placements and part-time study.

1.21. In addition, researchers at the University of Salford have been funded by the Higher Education Academy to conduct a detailed review of research and current practice related to international students' study experiences, which is likely to provide further insights into this topic.

2. Research on International Student Perceptions

2.1. As discussed in Section 3, in response to the increasingly competitive and volatile cross-border student recruitment market, institutions and sector agencies are seeking to find out more about the motivations of international students when choosing to study on an overseas programme, and their perceptions of particular destination countries.

2.2. The British Council and J Walter Thompson Education have conducted two key studies in this area, one on students who choose to study abroad in Major English Speaking Destination Countries (MESDCs), and the other on transnational students who have chosen to study on overseas

programmes in their home countries. Some qualitative findings from the latter study have been presented, and these are discussed below.

a) Transnational Education Qualitative Market Research

Conducted by J Walter Thompson Education for the British Council

<http://www.britishcouncil.org/goingglobal-session-1-1100-thursday-tne-alison-doorbar-powerpoint.pdf>

- 2.3. This research study, containing both a qualitative and quantitative phase, sought to provide a detailed profile of the target market for transnational education in 3 key destination countries (Hong Kong, Malaysia and Singapore). It sought to investigate why students chose to study via TNE, why they chose programmes from a particular country, the key decision making factors used in the selection of TNE programmes (e.g. flexibility, student support, reputation of local partner, reputation of awarding institution, cost, government recognition, employer expectations and country) and the main ways students find information about TNE programmes.
- 2.4. Findings from the qualitative research found that UK TNE is rated highly by students in Hong Kong, Malaysia and Singapore, although students do have concerns about quality control. The research also highlighted that student perceptions differ by country, and so institutions will need to develop very targeted strategies to effectively reach these different groups.

b) IPSOS Mori/UNITE - The International Student Experience Report (2006)

<http://www.ipsos-mori.com/polls/2005/unite-international.shtml>

- 2.5. The Ipsos Mori research also covers international students' motivations for choosing their country and institution of study, and found that the academic reputation of the institution is the most often cited reason (51%), particularly for non-EU students and postgraduates who are also concerned about research reputation. Institutional reputation for the quality of teaching was next highest rated at 38% and, interestingly, league tables were cited by only 16% of international students. The UK is generally chosen by students who believe that studying here will help them to meet their expectations for career enhancement as they will succeed in getting the qualifications that they need to gain employment (74%).

c) Educational Policy Institute – Global Higher Education Rankings (2005)

<http://www.educationalpolicy.org/index.htm>

- 2.6. This research report, undertaken by the Canadian organisation the Educational Policy Institute (EPI) ranks a number of the key international recruiters of international students on the affordability and accessibility of higher education within an international comparative context (Usher and Cervenak, 2005) Countries with large student bodies, high attainment rates, extensive grant programmes and which are reasonably reflective of broader society (e.g. Netherlands and Finland) rank the highest on both dimensions. The main recruiting countries, e.g. the UK, USA and Australia tend to rank higher on accessibility than affordability, although they tend to have higher national incomes and greater student assistance. The UK ranks 3rd out of 13 countries on accessibility and 13th out of 15 on affordability.

d) Summary of findings international student perceptions research

- 2.7. It is clear that research into student perceptions of and motivations for study in particular countries are at an early stage, and more detailed research is required. However, it seems clear that the UK ranks highly on academic quality, although rather lower on accessibility and cost. It is also evident that the factor that influence student motivation and perceptions differ between countries and that this complexity needs to be taken into account by providers when recruiting students from particular markets.

3. Findings from the Case Study on the International Student Experience

- 3.1. The case study provided detailed data in relation to some of the specific issues of concern to international students as well as aspects of their experience that were valued.
- 3.2. In the case-study institution, 'international strategy' and strategy development for 'the student experience' have been brought together in the portfolio of responsibilities carried by one Pro Vice Chancellor. This factor has enabled some synergies to emerge, for example, in working groups and forums set up to discuss each agenda where the same individuals and areas of expertise (e.g. Students' Union officers, Student Advice Services) are represented. Once again, a focus at senior management level has meant that both attention on priorities and co-ordination of previously separate areas is being brought together - but not at this stage in terms of new organisational structures.
- 3.3. Our focus was specifically on the experience of international students, although the interviews also covered other students (home and EU) and international staff. To provide a framework for investigating the broad concept of 'experience' we adopted the categories used in other research mentioned above (Leonard et al. op cit.; UKCOSA op cit.; Usher & Cervenán, op cit.), namely academic, social, cultural, administrative and environmental. Our data revealed that these categories were useful in covering the range of ways in which students (and staff from student-facing units and departments) described their experience of institutional strategy and practice.
- 3.4. As can be seen from the following table (Table 6), our findings are broadly comparable to other studies in the field. Within our interviews there was evidence of polarisation between those who argued that all students should receive the same services - and same levels of service - and those who pointed to a need for specialist or differentiated services. Our data would suggest a need for both generic and specialist services and support. We also noted that in some areas (for example, in some social and cultural aspects) the experiences (and related needs) of non-UK staff was comparable to that of international students and could have implications for HR practices in institutions.

Table 6: Categories of student experience and related issues for international students

Category of student 'experience'	Issues for international students
Academic	<ul style="list-style-type: none"> English language difficulties affect home & overseas students; Pedagogical differences require exploration and orientation (for staff and students) Proactive support valued Academic representation at programme level important Education, social & welfare issues closely linked More flexibility in academic delivery needed Currency of qualifications is key Evidence from NSS useful in focusing attention & actions
Social	<ul style="list-style-type: none"> Different interests and requirements from many home students - implications for optional and alternative services Societies very important for welfare and support Need a 'social strategy' for students
Cultural	<ul style="list-style-type: none"> Different priorities and needs; importance of communal activity and community events in many countries 'International experience' useful for cultural understanding and of potential benefit to all students
Administrative	<ul style="list-style-type: none"> Categories of students (home, EU, international) are unhelpful (and not related to experiences) Procedures and committees not integrated according to student needs; Link between the international and cultural diversity agendas Timing of university calendar creates difficulties Visa difficulties prior to entry and policy checks in UK cause difficulties Involvement in institution-level forums leading to action is valued

	<ul style="list-style-type: none"> • University and SU data could be complementary, but sometimes contradictory • Students keen to be involved in relevant University projects • Need for support to assist students to study abroad
Environmental	<ul style="list-style-type: none"> • Distance from home a problem for many students • Cost of study high • Barriers to working, or while studying and working exist • Accommodation needs and catering requirements differ from home students

4. Conclusions on the International Student Experience

4.1. From all our data sources we draw the following conclusions in relation to those areas where attention is needed at the level of the sector, institutions and individual staff members. We note:

1. The need for cultural sensitivity in the orientation and support of students, including awareness of the levels and forms of alienation that can be experienced when encountering the UK for the first time; the experience of overseas' staff has parallels and can be useful for students as well as institutions.
2. The need for continued monitoring of students' expectations and experiences throughout their relationship with the institution, particularly beyond the recruitment and orientation stages.
3. The need to give attention to issues of integration between groups of students both socially and academically; welfare and academic issues are closely connected for students.
4. The need to be aware that the motivations that lead to study abroad are as much about gaining a cultural experience and enhanced career prospects as about academic study for its own sake.
5. Preparation for employment and the vocational value of qualifications for professional mobility is often of critical importance.
6. The need to understand, through data and dialogue, who the international students are, including a recognition that continental European students are also international and may share needs and expectations with students from other regions and countries.
7. Undergraduate and postgraduate international students may have more needs in common than similar groups of local students; in addition, although international students share many of the same needs as local students, they also have specific and different needs which require focused resources and support
8. The importance of including student representation at all levels of practice that affect their overall experience; an effective relationship between Student Unions and Associations and the institution is invaluable
9. The importance of individual care and responsive feedback and action at all levels of the institution. Seamless and effective administrative and IT support through 'a student's life-cycle' is necessary, but so too are one-to-one relationships in delivering high quality experiences to students
10. 'Word of mouth' between students and their sponsors, whether parents, employers or governments within overseas' communities is a powerful reputation builder - and destroyer – of international markets
11. Poor quality or practice in one UK institution affects the reputation and standing of the UK as a whole
12. The high cost of study in the UK is becoming notorious, so the question of value for money is of increasing importance for institutions and the sector to address.

5. Summary

- 5.1. Section 6 focuses on the experiences of international students in UK higher education. The first part considers recent research on this topic while the second part draws on data from the case study. The two sources of information are drawn together to provide an overview of the categories and nature of issues of concern to international students, covering academic, social, cultural, administrative and environmental domains.
- 5.2. The main conclusions identify a need for: cultural sensitivity in the orientation and support of students; continued monitoring of students' needs and expectations throughout their relationship with the institution; and the need to consider issues of integration among students. Student motivations are highlighted in terms of cultural experiences and opportunities that are vocational or targeted at careers.
- 5.3. Understanding in detail who the international students are is of central importance, including the identity and needs of EU students which may be shared with other international students and the different or similar needs of undergraduate and postgraduate students. Good relationships with student representatives and representative bodies are valuable.
- 5.4. The quality of care and feedback at academic and administrative levels is noted as a core factor that impacts on experiences of students well as the increasingly significant issue of the value for money of the international students' experience.
- 5.5. The final conclusion points to the importance of 'reputation' in terms of students' experiences and how reputation is spread through word of mouth within international communities. Institutions need to give attention to the students' experiences in terms of their own reputation and to be aware that institutional behaviour and practice also has an impact, for good or ill, on the reputation of other UK institutions.

Section 7: Conclusions

1. Introduction

- 1.1. This research project has undertaken a broad investigation into the changing international environment for higher education in the UK and its impact on national and institutional educational strategies and practice. The project also investigated research on international students' experiences to identify key issues that can have an impact on students' higher education careers in the UK.
- 1.2. A central purpose of the project was to test a review process that could be used by universities and colleges to evaluate, develop and enhance their own strategy and practice in relation to international activities and the internationalisation agenda, with a particular focus on the link between institutional strategy and practice and international students' experience. Within this report we have drawn on observations that emerged from the pilot-testing of this tool in one institution by relating these observations to our analysis of the strategies of other institutions and the wider literature on strategy, organisational development and internationalisation.
- 1.3. All our data sources (academic literature, 'grey literature', reports and interviews) point to the same conclusion, namely that the international environment is becoming more complex and more challenging for UK institutions individually and for the sector as a whole. Higher education is not unique in experiencing this context; it is part of wider globalisation trends that are affecting countries and economies.

2. A changing context

- 2.1. In relation to higher education, there are some specific features of the changing environment. These include:
 - Increasing demand from students for international higher education, and a diversification in the nature of this demand from traditional forms (travel to study in another country) to other types of demand (for locally provided international education and for flexibly delivered modes of provision)
 - Increasing diversity of types of delivery that are available to students including provision from public, private, corporate and for-profit providers
 - Increasing competition between countries and providers to recruit international students
 - Increasing volatility in the markets for international students due to a range of factors, with variations depending on country or regional factors
 - Growth in numbers and range of partnerships and collaborations between higher education providers in different countries and between higher education providers and other organisations
 - A greater focus on the nature and quality of international students' experiences in higher education, wherever located
 - Increasing incidence and sophistication of institutions' international strategies.

3. Policy perspectives

- 3.1. UK policy agencies, government departments and international associations are clearly noting and responding to the changing international environment. Global competition, increased globalisation and the importance of 'increasing internationalisation' are frequently cited in policy documents. For most agencies, the economic dimension of globalisation was a key driver (whether viewed positively as an opportunity, or negatively as a threat). Strategic documents pointed to the growing significance of the European agenda for the UK (and for higher education), the need for global citizenship competences, the need to compare performance and learn from others and the need to develop greater mutual understanding between countries and regions. Becoming more international - or internationalised - was important also for strategic positioning in global markets

and for raising national and regional profiles. Higher education was highlighted as a key player in this international arena. Its role was central to the economic and political positioning of the UK, central to economic growth or regeneration, important as a partner for attracting inward investment and for generating income from exports and key to the development of necessary skills and attitudes for individuals living and working in a globalised world.

3.2. The short survey commissioned from the Observatory on Borderless Higher Education on the national-level approaches to internationalisation in other countries also shows their responsiveness to the changing international environment. For the purposes of the analysis, countries were grouped into three categories, all of which are closely associated with economic rationales for internationalisation:

- Internationalisation provides a short-term as well as long-term contribution to the country and the higher education sector (US and Australia)
- Internationalisation provides limited immediate financial contribution to the country and institutions, but a perceived long-term contribution to the society as a whole (Denmark and Germany)
- Internationalisation is actively encouraged as a way of enhancing or creating a knowledge-based society (Singapore, Malaysia, United Arab Emirates, South Africa, China, India and the Dominican Republic).

3.3. The conclusions that arise from this analysis are first, that changes are occurring in patterns of international recruitment. In particular, leading recruiters such as the UK, Australia and the US, have all experienced a downturn in the last two to three years (that is, of students travelling to these countries to study) while other countries and regions are at the same time growing their international recruitment of students through a variety of mechanisms including the import of transnational education.

3.4. The transnational education market is currently dominated by the US, UK and Australia, although there is evidence of other countries such as Germany, Singapore, Malaysia and India actively pursuing the export of higher education provision overseas. Joint degrees are also being pursued as a strategy for internationalisation. They are perceived in some cases as a lower risk option than other forms of transnational delivery, not least because of active governmental support for this development in some regions, notably Europe.

3.5. Teaching in English is also of growing importance in attracting international students, although it is also noted that the acquisition of languages other than English is important for staff engaged in the setting up or delivery of transnational education.

3.6. A further important conclusion from this survey is that if international provision (wherever located) is to be sustainable, particularly given the choices now available to students, then increasing attention will need to be given both to the quality and relevance of the education provided and to satisfying the expectations and subsequent experiences of students.

4. Institutional perspectives

4.1. Our analysis of UK institutions (both in the pilot site and more broadly) illustrates the range of ways in which institutions are responding to a changing international environment. In broad terms, there is an evident shift from an approach that focuses on a more-or-less narrow range of disparate international or international-facing activities to one that seeks to integrate and leverage across activities to add value and achieve a sharper international focus.

4.2. Considerable thought and effort is being given to the strategic and practical implications of 'internationalising' and 'internationalisation'. This means that vision and strategies are being renewed or created to focus on the international agenda, new roles and responsibilities are emerging at senior levels, re-structuring and re-organisation is taking place and resources are being increased or redirected. In this process, many UK institutions are consciously addressing their positioning, aspirations and responsibilities in a globalised world.

5. International students and their experience of higher education in the UK

5.1. The analysis of a series of recent research and survey reports relating to international students' experiences – when studying in the UK - reveal a consistent picture of the areas of institutional strategy and practice that are of importance to these students. The data cover academic, social, administrative and environmental factors. Within these domains, the majority of students appear to be happy with their overall experience including the quality of the teaching and course content (although the National Student Survey data provides some finer-grained variations across institutions and subject areas).

5.2. Students are less satisfied with the value for money of their study experience and some of the social and administrative dimensions of their experience including the quantity and quality of the personal and academic support received from staff. Our own case study provided more detail in relation to some of the specific issues of concern to international students as well as aspects of their experience that were valued. From all our data sources we draw the following conclusions in relation to those areas where attention is needed at the level of the sector, institutions and individual staff members. We note:

1. The need for cultural sensitivity in the orientation and support of students, including awareness of the levels and forms of alienation that can be experienced when encountering the UK for the first time; the experience of overseas' staff has parallels and can be useful for students as well as institutions.
2. The need for continued monitoring of students' expectations and experiences throughout their relationship with the institution, particularly beyond the recruitment and orientation stages.
3. The need to give attention to issues of integration between groups of students both socially and academically; welfare and academic issues are closely connected for students.
4. The need to be aware that the motivations that lead to study abroad are as much about gaining a cultural experience and enhanced career prospects as about academic study for its own sake.
5. Preparation for employment and the vocational value of qualifications for professional mobility is often of critical importance.
6. The need to understand, through data and dialogue, who the international students are, including a recognition that continental European students are also international and may share needs and expectations with students from other regions and countries.
7. Undergraduate and postgraduate international students may have more needs in common than similar groups of local students; in addition, although international students share many of the same needs as local students, they also have specific and different needs which require focused resources and support
8. The importance of including student representation at all levels of practice that affect their overall experience; an effective relationship between Student Unions and Associations and the institution is invaluable
9. The importance of individual care and responsive feedback and action at all levels of the institution. Seamless and effective administrative and IT support through 'a student's life-cycle' is necessary, but so too are one-to-one relationships in delivering high quality experiences to students
10. 'Word of mouth' between students and their sponsors, whether parents, employers or governments within overseas' communities is a powerful reputation builder - and destroyer – of international markets
11. Poor quality or practice in one UK institution affects the reputation and standing of the UK as a whole
12. The high cost of study in the UK is becoming notorious, so the question of value for money is of increasing importance for institutions and the sector to address.
13. Investigating strategy, practice and experience in the international arena of higher education

- 5.3. The adaptation, development and testing of an institutional review tool was an invaluable source of evidence for this project as it provided rich detail of issues that are discussed in the wider literature as well as aspects of practice that are not so well documented. The adoption of a holistic, organisation-wide approach, aimed at quality enhancement, was also useful to highlight the ways in which strategy and practice did or did not cohere in relation to international students' experiences as seen both by student representatives and by staff in different functional areas. The tool that we present as an outcome of this project should be of use to other institutions, although they will doubtless wish to adapt it for their own purposes, context and available resources. The ability to use the tool to its fullest extent and to use the outcomes from such a review for quality enhancement purposes depends, critically, on the responsiveness of the institution. In our case, we have been privileged to have the full support for this project from colleagues at many levels of the institution. We are deeply grateful for their time and commitment.
- 5.4. This project has sought to deliver benefits to institutions and to the sector as a whole. We hope that the combination of a micro-level investigation – to deliver a tool for use in other institutions - with the macro-level policy and comparative perspectives across UK institutions will prove to be of benefit and use to the constituencies at which our work was aimed.

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Appendix I: Institutional Audit Tool (Objective 6)

1. Analysis of the Existing Internationalisation Audit Tools

1.1. The development of the case study research methodology was informed by a detailed review and analysis of two existing research tools designed to investigate internationalisation in higher education institutions. The first tool is the International Quality Review Process (IQRP), an institutional self-assessment tool developed by Knight and de Wit (OECD, 1999), and the second is the Association of Commonwealth Universities (ACU) Commonwealth Universities Study Abroad Consortium (CUSAC) institutional benchmarking tool on internationalisation (ACU, 2002a). The methodology was also informed by other literature and research related to internationalisation and the development of international strategies in higher education.

a) IQRP

1.2. The International Quality Review Process (IQRP) is an institutional research tool developed by Jane Knight and Hans de Wit at the Programme on Institutional Management of Higher Education (IMHE) of the Organisation for Economic Co-operation and Development (OECD), in consultation with the Academic Co-operation Association (ACA) (OECD, op cit). The IQRP is designed to be used by institutions to self-assess and improve the quality of their internationalisation strategy and practice by critically analysing the extent to which their institution meets institutional goals and objectives for internationalisation, the integration of an international dimension into the primary functions and priorities of the institution, and the inclusion of internationalisation as a key element in the institution's overall quality assurance system.

1.3. The process involves three main stages:

1. An institutional self-assessment process undertaken against a standard set of questions and dimensions covering all aspects of institutional activity of relevance to internationalisation. Typically, staff from different parts of the institution (including academic and professional service units) collect information to answer these questions.
2. Co-ordination and analysis of the 'answers' and supporting documentation by a central team, and the production of a report.
3. External peer review of the report and a visit to the institution to talk to relevant staff and students. Following feedback to the institution, a consolidated report is produced (which may or may not be made public outside the institution).

Self-assessment process

1.4. The self-assessment process centres around an internal self-assessment team (SAT) involving academics, students and administrators collecting, collating and analysing internal data base on a process outline. Although, the IQRP is intended to be guided by an institution's own goals and objectives for internationalisation, it is based on a premise that there are number of areas of international activity that are common to most institutions. These are detailed in the process outline which is divided into the following 7 areas:

1. **Institutional profile** - This section covers general institutional statistics (e.g. numbers of staff, students, etc.) and the wider internationalisation context faced by the institution
2. **Internationalisation Strategies and Policies** - This section is designed to review the institutional mission and strategy as it relates to international activity, and how the leadership and decision-making structures support the international agenda. It also seeks to assess the institution's conception of internationalisation.

3. **Organisational and Support Structures** - This section seeks to review the nature and effectiveness of the policy-level and operational responsibilities for internationalisation within the institution, and covers areas such as planning and evaluation, financial support and resource allocation and support services.
 4. **Academic Programmes and Students** - This section seeks to assess the extent to which academic programmes and the teaching and learning process incorporate or address the international agenda (e.g. via curriculum change, and the development of joint programmes). It also seeks to review the extent and nature of overseas collaborative programmes and partnerships, opportunities for student exchange/study abroad for home students, and policies for overseas student recruitment.
 5. **Research and Scholarly Collaboration** - This section is designed to assess the extent of the institution's overseas research collaborations, the incentives and support for such activities, and the measures to evaluate their quality.
 6. **Human Resources Management** - This section seeks to identify and evaluate the institution's policies and procedures for encouraging and supporting staff participation in international activities, and for the recruitment of overseas staff.
 7. **Contracts and Services** - The final section seeks to identify and evaluate the quality of the institution's procedures related to overseas collaborative ventures such as distance learning programmes, development projects, and consultancy activities.
- 1.5. A conclusions section at the end of the process outline is designed to bring together the findings from the self-assessment process, to describe how the institution monitors its internationalisation activity, identify concerns and challenges for the institution in the short to medium term, and to outline recommendations for future changes to international strategy and practice.
- 1.6. There is limited guidance given to institutions with regard to how the data is collected within the institution, although in the pilot research staff in the relevant areas answered the questions, and the information was collated and analysed by the self-assessment team at the centre.
- 1.7. The SAT is also expected to write a self-assessment report at the end of the process, which is meant to review:
- the institution's goals for internationalisation and whether they are clearly formulated;
 - how these are translated into the institution's curriculum, research and public service functions
 - the institution's support and infrastructure for successful internationalisation;
 - how the institution monitors and evaluates its internationalisation activities; and
 - how the institution seeks to change in order to improve its internationalisation strategy

External peer review process

- 1.8. The self-assessment process is designed to be mirrored by an external peer review process that provides feedback and complementary analysis, although importantly, not inspection and evaluation.
- 1.9. The external peer review phase is informed by the self-assessment report, and involves a short institutional visit from a small team of experts on internationalisation. This visit informs the production of a report that seeks to evaluate the quality of the institutional self-assessment process and its findings, the link relationship between policy, strategy and practice, and the plans for the development and sustainability of the institution's international activities and strategy. It is up to the institution as to how to take these findings forward, although the authors recommend an internal dissemination and discussion process and a follow-up phase 1-2 years after the peer review exercise.

1.10. The review process is seen as part of an ongoing cycle of advocating, planning, implementing, rewarding, reviewing and improving the internationalisation strategy of the institution

1.11. The IQRP has been tested by the OECD in nine pilot institutions in different countries (from Africa to Australia) but none of these were UK institutions (OECD, op cit.). Each pilot site approached the application of the IQRP in a different way depending on their own context and the available resource, although each had an internal co-ordinating team. Two key issues that emerged from the pilot process were the time-intensive nature of the process, and a subsequent difficulty in producing analytical rather than descriptive findings given the focus on data collection.

1.12. The IQRP has also been adapted for the US context through the work of the American Council on Education (ACE). Their specific adaptation has taken the form of 'Questions to Guide an Institutional Internationalization Review' which can be found in a useful publication "Internationalizing the Campus: A User's Guide" (Olson et al., 2003).

b) CUSAC

1.13. The Association of Commonwealth Universities (ACU) has developed an institutional benchmarking tool on internationalisation for use by the Commonwealth Universities Study Abroad Consortium (CUSAC), a group of Universities from around the Commonwealth. A number of Commonwealth universities participated in a seminar in March 2002 (ACU, 2002a and 2002b) that sought to benchmark internationalisation in 5 broad areas, namely:

1. Policy, mission and strategy (e.g. content, development, operationalisation, participation)
2. International programs and activities (e.g. geographic focus, participants, activities, integration with service functions)
3. International students (e.g. recruitment, support, finance, satisfaction)
4. Management structure and function (e.g. committees, co-ordination, leadership, responsibilities)
5. Evaluation and impact (e.g. measures/indicators of impact, procedures)

1.14. No UK universities were involved in the seminar.

1.15. The seminar used an abbreviated version of ACU's process benchmarking model and attempted to analyse the activities and processes involved in internationalisation rather than comparing quantitative measures. Participants completed an in-depth questionnaire prior to the workshop, with five questions related to each of the broad areas, to establish current practice and policy; they also provided a range of contextual data about the institution (e.g. mission, numbers of international students and institutional size).

1.16. The main output of the seminar was the generation of 77 statements of good practice, 10-20 in each of the five areas. The project team are very grateful to colleagues at the Association of Commonwealth Universities (ACU) who granted the researchers privileged access to the benchmarking methodology and data.

2. Development of the Institutional Audit Tool

a) Adaptation of Existing tools

2.1. To create their research tool, the project team reviewed the content and format of the IQRP and CUSAC tools (described in section 1 above) to assess how adaptable they were to UK institutions, and also to the context within the case study institution. The project

team co-ordinated the development of the tool with other UK universities that were also undertaking developmental research related to teaching and learning, informed by the IQRP and other research.

- 2.2. After careful consideration, the project team decided to develop an adapted version of the IQRP tool for use in the pilot study. The CUSAC tool contains similar elements to the IQRP but in less detail, although the adapted tool also integrated some of the issues in the CUSAC tool that weren't contained within the IQRP.
- 2.3. The IQRP tool was adapted in terms of purpose, content and structure, format and process. A major reason for these adaptations was that the research was designed to satisfy two sponsors. The external sponsors (HEA) were interested in a piloted institutional tool that could be made available to other institutions; separately, the internal sponsors sought a report to the institution that could be used to enhance strategy and practice internally.
- 2.4. In addition, the project team had an initial concern that the process outline of the IQRP could be seen as having normative value, for example an institution using the tool may feel that it should focus, structure, and evaluate its international activities in a particular way as set out by the tool outline, rather than the tool acting as a neutral investigative device to examine the fit between institutional strategy and practice. In addition, the project team also had a concern that some of the information contained within the process outline was thought to be open to interpretation, and the information collected could depend on the individual or unit that responded to a particular section.
- 2.5. The purpose of the IQRP was adapted slightly to ensure that it was able directly to serve internal 'quality enhancement' requirements and inform the development of the pilot institution's international strategy, rather than review current practice against existing strategy. Therefore, the external peer view element of the IQRP was dropped and the tool was reconfigured to be used as a basis for research undertaken by an in-house team experienced in policy-related international research.
- 2.6. The content and structure of the IQRP process outline was adapted to ensure that the tool was able to investigate the link between intended or actual strategy, reported practice and the experience of staff and students. The content of the outline was supplemented with some additional elements, including a greater emphasis on leadership and management structures, the role of administrative units/departments and a more detailed focus on investigating the international student experience. The categories used in the IQRP process outline were also restructured to reflect the aspects of international activity and internationalisation identified in the review of the institutional context in the UK as discussed in section 4 of the final report.
- 2.7. The original IQRP outline contained a series of questions to be answered by whoever was responsible for data collection in each area, but in the adapted tool these questions were replaced by a series of topics that were designed to guide the data collection process. The intention was to create a tool that would structure data collection, but would not seek to 'answer questions'. The final version of the adapted process outline is provided in table A3 below.
- 2.8. The changes described above also informed a major adaptation of the process of using the audit tool within the institution. The project team analysed the information required in the process outline in terms of the types of data required (Table A1) and the potential sources of data within the pilot institution (Table A2).

Table A1: Types of data required

Teaching and learning processes	Recommendations (e.g. improvements to policy and practice)
Institutional profile	Historical information – general and international
Statistics (e.g. staff, students)	Institutional policy (e.g. rationale, mission, strategy, targets, PIs, etc.)
Policy & strategy development and implementation	International activities (e.g. recruitment, teaching, collaboration, exchanges, etc.)
Curriculum content	Perceptions/understanding of key concepts and issues (e.g. internationalisation, international context)
Specific support services for international activity (e.g. students, research, collaboration, etc.)	Evaluation of the functioning, impact and effectiveness of key areas of activity, processes and procedures (SWOT)
Facilitating processes (e.g. reporting, liaison and communication)	Organisational structures – academic and administrative
Specific initiatives (e.g. social integration, curriculum development/reform, language provision)	Systems – e.g. Knowledge Management
Leadership and responsibilities	Supporting processes & procedures (QA, planning, resource allocation, student services, HR, marketing, course approval, evaluation, senior management roles)

Table A2: Potential sources of data within the institution

Primary data	Secondary data
Bespoke questionnaire(s)/survey(s)	Institutional policy documents – Mission/Vision statement, Strategic Plan, International Strategy
Qualitative interviews with staff and students	Information from respondents (e.g. organograms, terms of reference, reports, etc.)
Focus groups with staff and students	Specific databases (e.g. register of overseas links, collaborative provision database)
Observation of practice	Research reports (e.g. international student experience)
	Institutional web site
	Committee minutes and relevant papers – SMT, Planning & Resources, International
	Statistical databases managed by particular institutional processes (e.g. HR, Registry)

2.9. The range of different types of information required to cover the areas described in the process outline and the need for both primary and secondary data led the project team to alter the format of the outline so that it could be used as the basis for semi-structured interviews combined with desk research.

2.10. The desk research phase allowed the researchers to collect, collate and review the wealth of documentary and statistical data that was required to investigate an institution's response to internationalisation. The interview-based approach was designed to investigate 'softer' or more qualitative issues such as the effectiveness of communication processes, formal and informal relationships, and the impact of institutional culture on strategy and practice. Other primary data collection approaches such as focus groups and observation of practice were considered, and would have been very useful, but were beyond the resources of the project.

2.11. The project team considered asking the pilot institution's international office to use the adapted audit tool, but its area of expertise focused mainly on the recruitment and support of international students, rather than the wide-ranging cross-institutional elements covered by the tool. Therefore it was thought best for the project team to undertake the data collection and analysis.

b) The Audit Tool Process

2.12. The project team piloted the adapted tool in the case study institution by following the 5 broad stages described below.

Review and amend the information and data required

2.13. The process outline was reviewed by the project team to assess its relevance to the institutional context. For example, some of the terminology was changed to suit the language and labels used in the institution (e.g. titles of academic and service units, terms used to describe overseas' provision).

Identify existing information and data sources within the institution

2.14. Potential information and data sources that already existed in the pilot institution were then identified by the project team in association with the project steering group members. At this stage key individuals and departments and units with involvement in international activity in the pilot institution were also identified, as these people were likely to be able to provide access to much of the available data.

Collect, collate and review existing information (secondary data)

2.15. Information and data were then collected and collated and stored either in a project database, or in data files as appropriate. The information contained was then reviewed according to the information required in the process outline. Any information gaps were recorded in preparation for the primary data collection phase.

Collect, collate and review information from institutional contacts (primary data)

2.16. Following the secondary data collection phase, a data collection instrument (an interview structure in this case) was developed to guide the primary data collection phase. This was developed in association with the project steering group, and tailored according to the respondent. The information was then collected and reviewed by the project team. Following the initial analysis relevant departments and individuals were re-contacted to clarify information collected, and extra information was collected as required. A fuller description of the primary data collection process is provided in Section 1 of the final report.

Produce project outputs for institutional stakeholders

2.17. After the data collection phase, the project team then worked with the project steering group within the institution to develop a range of outputs from the audit process that would be of use for quality enhancement and strategy development. The range of potential outputs include short reports for key institutional committees, developmental seminars and focused feedback to relevant departments and working groups.

3. Reflections on the Piloting of the Audit Tool

3.1. The methodological approach worked effectively in the case study institution and the project team were able to collect sufficient relevant information to answer their research questions.

3.2. The legitimacy of the project was secured by gaining high-level institutional sponsorship of the research. A number of members of the senior management team were involved in developing an institutional international strategy in parallel to this project taking place, so were directly interested in the project and its outcomes. Such internal sponsorship was critical to gaining privileged access to relevant institutional data (strategy documents,

committee papers, internal statistics etc) and to smoothing the way for internal interviews at all levels of the institution.

- 3.3. The project team were already well-placed to undertake the research since they had a track-record of conducting international policy-oriented research and also had a formal role in relation to the University's Planning Department to provide 'intelligence reports' and undertake internal institutional research. An earlier report on international development related to international student recruitment and the international student experience, had already been submitted to the Planning Committee, and this offered an entrée for the new research, ensuring its sponsorship at senior management level.
- 3.4. The integration of the project team within the institutional policy making environment also helped the researchers to know which internal procedures to follow, and to be aware of organisational politics which could have acted as barriers to access to key individuals and data. However, although the project team had significant background knowledge about the management and organisation of the institution, and where information was likely to be located, it became apparent that the necessary data was not always collected, particularly in a form that was useful for the project. An observation arising from this issue is that knowledge management within an institution is often focused on the particular needs and practices of individual units, and is not always accessible to those outside a particular area of responsibility.
- 3.5. The data collection and analysis phases, although assisted by institutional support, proved time-intensive given the amount of information that needed to be collected, reviewed and analysed, and the collection of some data required extra work from institutional staff. In addition, some information (e.g. regarding current overseas collaborative links and international research projects) proved unavailable, or was not collected in a consistent form throughout the institution. It would be useful for any repeat of this research, for data management systems to be established to collect and manage such data.
- 3.6. The interviews were illuminating and candid, and provided useful information that could not have been gained in written form. It was unfortunate that the budgetary restraints meant that only one or two representatives could be interviewed from each unit or department, as it would have been useful to gain alternative perspectives and to learn from different experiences.
- 3.7. Overall, the project team feel that the institution benefited significantly from the methodological approach. For example, many respondents found the interviews very useful in clarifying their own thoughts regarding the international dimension, and some found the process 'cathartic' and 'thought-provoking'. Furthermore, some units and individuals have used the process of providing information and giving interviews as a springboard for making changes to their own activities. At institutional level the case study process has fed into international strategy development throughout the project. However, for other institutions undertaking a similar approach, cost-benefit considerations will have to be recognised, given the labour intensive and thus costly nature of the methodology.

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Table A3: Institutional Audit Tool – Process Outline

Topic	Info required	Detail
Institutional context/profile	Institutional profile	History, student numbers, staff numbers, administrative structure, academic structure
	Mission/vision statement	
	Strategic objectives	
	International profile	History and brief overview of international activity (e.g. collaborations, trends in student recruitment, research, exchanges, etc.)
	Number of international students	By Faculty/School, level, and by country
	Number of international staff	By Faculty/School, and by country
	Number of international partners	By country
	Number of overseas programmes	By country
International strategy/policy	Overview of international strategy/policy	From the International Strategy or Strategic Plan
	International strategic objectives, performance indicators, milestones and implementation plan	
	Unit(s) and individuals responsible for, and involved in, the formulation and development of the international strategy	Participation of senior managers, staff, and students
	Procedures for the evaluation of the impact of the international strategy/policy on the institution	Indicators/measures used for assessment
Internationalisation	Conceptualisation of internationalisation	At central and Faculty/School level
	Importance and value of international activity/internationalisation	At central and Faculty/School level
Organisation and management structures	Unit(s) responsible for the implementation of the international strategy	
	Unit(s) responsible for the co-ordination of international activities described in the strategy	
	Services and infrastructure in place to support and develop international activities described in the strategy	e.g. knowledge management systems and mechanisms, etc.
	Other administrative units with operational responsibility for international activities described in the strategy	
	Responsibilities of schools/faculties related to international activity and the implementation of the international strategy	
	Committees with responsibilities for international activities described in the strategy	
	Other communication and liaison channels related to	Formal and informal

Topic	Info required	Detail
	international activity	
	Line management and reporting structures related to international activity	
Planning and evaluation	Integration of international activity and internationalisation into the planning process	Institution-wide and department/faculty planning process
	Evaluation procedures related to the impact and effectiveness of international activities	Indicators/measures used for assessment
	Role of the Quality Assurance system in international activities	
Financial support and resource allocation	Internal and external sources of support for internationalisation	
	Processes for seeking, securing and maintaining internal/external support	
	Allocation mechanisms for such support	Faculty/school or central levels
Institution-wide administrative services and facilities	Support for international activity and internationalisation from institution-wide services and facilities	<ul style="list-style-type: none"> • Charged services (e.g. catering, accommodation) • Student services • Library & Information services • Marketing • Human Resources • Students Union • Research & Consultancy Support • Finance • Registry and Quality Assurance • Alumni & development
	To what extent is an international perspective built into the policies/strategies of institution-wide services and facilities?	
	Evaluation of impact of activities on international dimension and internationalisation	Indicators/measures used for assessment
Internationalisation of the curriculum/teaching & learning	Policy for the integration of international/inter-cultural dimension into the curriculum	
	Unit(s) responsible for developing, co-ordinating and monitoring the internationalisation of teaching and learning at central and School/Faculty level	
	Initiatives related to the pedagogy of teaching of international students	
	Provision of international modules (e.g. language, area studies) within degree programmes	
	Integration of international teaching and learning material (e.g.	

Topic	Info required	Detail
	examples case studies, etc. drawn from other countries, cultures, etc.)	
	Opportunities for language learning and instruction in other languages	
	Initiatives for academic integration of home students and overseas students in the learning process	(e.g. cultural diversity training, discussion of different approaches to learning)
	Partnerships with overseas institutions to offer international programmes/modules	Joint/double degree programmes in partnership with overseas inst.
	Evaluation of the effectiveness of introducing an international dimension into the curriculum/teaching & learning	Indicators/measures used for assessment
	Opportunities for career development including work experience, employability or entrepreneurship skills' training and career guidance in an international context	
Overseas student recruitment	Recruitment strategies and targets	Geographic focus, subjects, etc.
	Support structures and resources for overseas recruitment	
	Unit(s) responsible for developing, co-ordinating and monitoring overseas student recruitment at central and School/Faculty level	
	Links/relationships with other departments and units	
	Evaluation of the effectiveness of overseas student recruitment strategies and activities	Indicators/measures used for assessment
Transnational Delivery	Strategy and policy for courses/programmes taught abroad	e.g. Distance Learning, Branch Campuses, Franchises, Progression agreements, Collaborative programmes
	Nature and extent of overseas delivery	
	Unit(s) responsible for developing, co-ordinating and monitoring overseas provision	
	Processes and methods (internal/external) for the establishment and evaluation of overseas provision	
Study abroad/Student exchange programmes	Policies and support services to encourage and support students to participate in international exchange/study abroad activities	
	Unit(s) responsible for developing, co-ordinating and monitoring study abroad/student exchange activities	
	Integration of study abroad periods into the curriculum	
	Participation in international student exchange/study abroad networks	

Topic	Info required	Detail
	Range of study abroad and exchange programmes available	
	Incorporation of international experience or internships into the curriculum	
	Evaluation of the effectiveness of study abroad and exchange programmes	Indicators/measures used for assessment
Student support and guidance	Unit(s) responsible for providing advice and guidance to international students and students on study abroad/exchange programmes	
	Services provided to international students and students on study abroad/exchange programmes	Pre-arrival, on arrival, during study, and on departure
	Information mechanisms for students about study abroad/exchange opportunities	
	Preparation of home students for international study abroad/exchange academic experiences (language, cultural)	
	Initiatives to promote integration (educational and social) of overseas (exchange and degree) students	
	Organisation of social and academic guidance and support for overseas (exchange, transnational and on-campus) students	Are exchange/study abroad or transnational students treated differently to students on-campus?
	Evaluation of the study experience of overseas students (on-campus and transnational) and students on study abroad/exchange programmes	Indicators/measures used for assessment
International Partnerships and networks	Range of collaborative agreements with overseas partner institutions – level of activity/functionality	E.g. Memoranda of understanding
	Level and type of participation in international networks	
	Unit(s) and individuals responsible for developing, co-ordinating and monitoring overseas partnerships and linkages	
	Procedures for establishment, management and periodic evaluation of partnerships and linkages	Indicators/measures used for assessment
	Relationship between policies and strategies for international partnerships at faculty and central level	
International Research projects/collaboration	Institutional policy and strategy related to international research activity	
	Collaborative agreements with overseas institutions/research centres/private companies for research	
	Support structures for international research projects and	e.g. information, guidance, technical support

Topic	Info required	Detail
	collaborative research	
	Resources available to stimulate international research	
	Links between international research (and outputs) and international teaching and learning	
	Unit(s) and individuals responsible for developing, co-ordinating and monitoring international research	
	Relationship between policies and strategies for international research at faculty and central level	
	Procedures for the periodic evaluation of international research partnerships and linkages	Indicators/measures used for assessment
Consultancy and Knowledge Transfer	Institutional policy and strategy related to international consultancy and knowledge transfer	
	Level of activity in consultancy and knowledge transfer (education, training) and extent to which these activities include an international and cross-cultural dimension	
	Support structures for international consultancy and knowledge transfer	
	Resources available to stimulate international consultancy and knowledge transfer	
	Unit(s) and individuals responsible for developing, co-ordinating and monitoring international consultancy and knowledge transfer	
	Procedures for the evaluation of activities to develop international consultancy and knowledge transfer	Indicators/measures used for assessment
	Data-base on business links and opportunities	
International Influence and Reputation	Institutional policy and strategy related to promoting international influence and reputation	
	Unit(s) and individuals responsible for developing, co-ordinating and monitoring activities related to promoting international influence and reputation	
	Publication of scientific articles in international journal by staff	
	Organisation of international conferences and seminars	
	Staff participation in overseas conferences, seminars, networks and professional/academic associations	
	Procedures for the evaluation of activities to promote	Indicators/measures used for assessment

Topic	Info required	Detail
	international influence and reputation	
Development projects and collaboration	Level of involvement in international development projects as a contractor/partner	
	Institutional policy and strategy related to international development projects and collaboration	
	Unit(s) and individuals responsible for developing, co-ordinating and monitoring activities related to international development projects and collaboration	
	Policies/procedures for management and evaluation	
	Link between development assistance projects and other internationalisation activities	
	Procedures for the evaluation of international development projects and collaboration	Indicators/measures used for assessment
Recruitment and integration of overseas staff	Institutional policy and strategy related to the recruitment of overseas academic and administrative staff (temporary and permanent)	e.g. whether appointment procedures seek staff from abroad
	Unit(s) and individuals responsible for developing, co-ordinating and monitoring the recruitment of overseas academic and administrative staff	
	Mechanisms to recruit overseas academic and administrative staff (temporary and permanent)	
	Support for the integration of overseas/visiting teaching and research staff into campus life	Social and academic integration
	Procedures for the evaluation of activities to recruit and support overseas academic and administrative staff	Indicators/measures used for assessment
	Provision of international opportunities for staff	Institutional policy and strategy related to the participation of university staff (academic and administrative) in international activities
Unit(s) and individuals responsible for developing, co-ordinating and monitoring the participation of university staff in international activities		
Nature and extent of staff involvement in international activities		e.g. teaching, research, international conferences, development assistance
Mechanisms for supporting academic and administrative staff to engage in international activities		e.g. language training, diversity training, skills development

Topic	Info required	Detail
	Mechanisms to encourage and reward staff who engage in international activities	e.g. performance evaluation, promotion, other benefits
	Procedures for the evaluation of activities designed to encourage and support staff to engage in international activities	Indicators/measures used for assessment

Qualitative Interview Structure

A: Introduction to the interview process

1. Project summary
2. Interview process
 - Semi-structured interview
 - Digitally recorded
 - Confidential
3. Introduction to the types of information required/questions
4. After the interview
 - Next steps
 - Opportunities for further contact
 - Reporting & dissemination

B: Functional area in outline

1. **General:**
 - Purpose: terms of reference, and areas of responsibility and accountability
 - Executive action: who is responsible for a) making things happen, and b) implementation?
 - Reporting lines: to whom, by what means (e.g. committees)
 - Liaison: linkages/relationships with academic and administrative units/departments and university senior management
 - Budget and resources: types of resource, allocation mechanisms
 - Communication: publicity and PR (e.g. organisational chart, responsibilities, key contacts)
 - Monitoring and quality assurance
 - Evaluation: of core activities and their impact on 'customers' (e.g. staff, students)
2. Specific activities related to international activity and internationalisation (separate issues for each unit)
3. Role in the development and implementation of the international strategy

C: Academic Schools

1. International activities:
 - Responsibilities and associated structures
 - International collaboration/projects (research and teaching)
 - Staff exchanges
 - Student exchanges and study abroad programmes
 - International student recruitment (UK, EU and international)
 - International scholarly activities (e.g. conferences, seminars, publications)
2. International student support
 - Services provided (e.g. offices, support)
 - Resources allocated
3. Relationships with other parts of the university related to international activity and internationalisation
 - Resources, support and guidance (from central services, other)
 - Reporting lines for international activity
 - Linkages/relationships with other academic units/departments, service units/departments and university senior management

D: Perceptions

1. SWOT analysis of a) the particular functional area/school and b) the university as a whole, related to international activity & internationalisation, in terms of:
 - What works well
 - What doesn't work well
 - Barriers to success
 - Areas for improvement
2. International activity and internationalisation at the university
 - Meaning
 - Importance
 - Changes over time
 - Impact of the wider international context

E: External linkages & comparisons

1. Linkages between the functional unit/School and relevant external organisations and activities (e.g. representative bodies, professional associations, projects etc.)
2. Comparative knowledge – how is the university the same/different to other comparable institutions?

F: Additional information

1. Within the university
2. External organisations

Appendix 2: UK Policy Context for International Higher Education

Section 1: Overview

1. Purpose of the survey

- 1.1. In the light of the overall project objectives, this survey aimed to explore views about the nature and extent of 'increasing competition and growing internationalisation' for the UK higher education sector and to identify associated policy responses. The policy agencies were chosen on the basis that their strategies and activities had actual or potential relevance to institutions' international (or internationalisation) strategies. Given the small scale of the project, not all relevant departments and agencies could be included. We have also excluded some from the final report where we searched but found no evidence of a specific (or publicly available) international strategy or international dimensions to a corporate strategy, or where strategies were currently under development.

2. Data sources

- 2.1. This section is based on two data sources:

1. Relevant policy documents
2. Interviews with a sample of policy agencies and government departments in the UK that have international strategies of particular relevance to higher education institutions and their students.

3. Organisations and agencies included in this report

- 3.1. The following organisations are included:

- Universities UK
- Universities Scotland
- Quality Assurance Agency for Higher Education and QAA Scotland
- Department for Education and Skills
- Scottish Executive
- Welsh Assembly
- Department for Employment and Learning Northern Ireland
- UK Trade and Investment
- Department for International Development
- British Council
- UKCOSA
- Higher Education Academy
- Observatory on Borderless Higher Education
- Leadership Foundation for Higher Education
- Higher Education Funding Council for England

Section 2: Organisations and Agencies

1. Universities UK (UUK)

<http://www.universitiesuk.ac.uk/>

- 1.1. Universities UK (UUK) developed its most recent international strategy in March 2005 (<http://bookshop.universitiesuk.ac.uk/downloads/intlstrategy.pdf>). The strategy describes universities as 'international organisations' and includes in their international activities: research partnerships and collaborations, academic and student exchange and consultancy as well as the hosting of international students and researchers. The strategy suggests that while the UK has a long international tradition,

"It is vital that we maintain our strength in international activities as higher education becomes an increasingly globalised activity and international competition for students, staff and research funding grows." (UUK, 2005, p1)

- 1.2. The strategy reports an increase in international student numbers in UK HEIs of 60% in five years (between 1999 and 2004) and records the particular benefits of international student recruitment in terms of:
- The opportunity to educate citizens of other countries (providing the UK with significant geopolitical and cultural benefits)
 - Broadening the educational experience of UK students and ensuring the diversity of the student body
 - Contributing to universities' income
 - Contributing to the export earnings of the UK economy.
- 1.3. Universities' UK carries out its international work (<http://www.universitiesuk.ac.uk/international/>) through two internal Strategy Groups (International and European), through links with university associations in Europe and around the world and through contributions to policy development at national, European and international levels. There is also a separate Strategy Group relating to 'the student experience'.
- 1.4. On specifically European activities, UUK with other agencies (including the Funding Councils, the Quality Assurance Agency and Standing Conference of Principals) established the Europe Unit in 2004 (<http://www.europeunit.ac.uk>). Two particular European agendas are tracked by the Europe Unit: the evolution and development of the Bologna Process and the initiatives and developments relating to the EU's Lisbon Strategy.ⁱⁱ These have relevance for students' educational and wider experience in higher education. The Unit also tracks developments within European Mobility Programmes (for students and scholars) and developments in the Recognition of European Qualifications.
- 1.5. The aim of Universities UK's international and European work is to ensure that the good reputation, quality and success of universities' own international activities are sustained, strengthened and developed. The agency is also concerned to maintain and promote the competitiveness of the UK higher education sector 'in the growing global higher education market' through actions that include:
- support for the continuation and further development of a national marketing strategy for UK higher education
 - promoting the exchange of staff and students internationally
 - promoting international academic collaborations

- supporting universities in developing transnational collaborations and provision
 - developing, promoting and disseminating good practice in the recruitment and admission of international and European students
 - supporting universities in providing a welcoming and valuable experience for international and European students who study in the UK.
- 1.6. UUK's international activity is typically undertaken with or through other agencies and is often responsive to agendas set elsewhere. For example, current work includes shaping the second phase of the Prime Minister's Initiative for International Educationⁱⁱⁱ with the British Council, the re-framing (where possible) of new Home Office immigration regulations that have had adverse effects on the recruitment of international students to the UK, the promotion of country-focused funding to support programme and research collaborations and exchanges (between the UK and India, China, Russia and Africa – follow the UUK international web site link above for further details) and discussions with agencies and institutions about the feasibility and desirability of collecting wider-ranging data on universities' international activities and collaborations.
- 1.7. UUK also seeks to engage with other agencies in the more difficult task of trying to shift perceptions of the UK and the language of universities' own international strategies towards 'partnerships and reciprocity' with other countries and beyond a predominant focus on international student recruitment for largely economic reasons. It is not yet clear how this will be achieved in practice, beyond illustrating the range of international activities with which UK universities are engaged to a variety of audiences.

2. Universities Scotland

<http://www.universities-scotland.ac.uk/>

- 2.1. Universities Scotland has recently published 'a first contribution from the higher education sector towards creating an internationalisation strategy for Scotland'. The purpose of the paper was to contribute to making 'Scotland a more cosmopolitan and outward-looking country and [to discuss how] we can enhance Scotland's position in the world'.
- 2.2. The paper, 'Internationalising Scotland¹' describes its ambitions for Scotland, arguing that 'if we are to become the best small country in the world, our future will be a high-skill, high knowledge, internationalised one' (Imrie, 2006),
- 2.3. The paper also lists a number of values that should underpin Scotland's internationalisation strategy. The strategy should be mutually beneficial (delivering benefit to other countries), professional, informed, co-operative, determined, compassionate, broad-minded, forward-looking and ambitious. These positive values are reinforced with reference to the negatives that Scotland will eschew: ' We will be inclusive, not narrow, open-minded not single-minded - a partner, not a parasite'.
- 2.4. The paper refers to the context for higher education:

" the global competition in higher education is growing fiercer all the time and we have to create incentives if we want people to choose Scotland."

"the market for international students has grown significantly and will continue to do so, but at the same time education providers have also grown in number and ruthlessness".

¹ Imrie C (2006) Internationalising Scotland: Making Scotland Global and International in its Outlook." In Scottish Affairs, Spring 2006.

- 2.5. The paper establishes distance between the UK government's actions and government actions in Scotland - 'where the UK government has sent a discouraging message [eg. cost of visas], we will send a welcoming one [eg. the Fresh Talent Initiative].iv
- 2.6. A number of incentives are proposed to make Scotland attractive for international students and staff including scholarships, assistance in finding relevant work, start-up packages for academics, high quality facilities and equipment and affordable housing.
- 2.7. An important aspect of the paper is that it suggests that any strategy for higher education should be 'plugged into a Scotland-wide internationalisation strategy and needs to draw on the market intelligence which can be derived from all Scottish agencies working in international markets. In particular, Universities Scotland wants to talk to Scottish Development International (SDI) and the Scottish Executive to identify ways in which the value of education exports (currently worth £360 million to Scotland) can be further increased' (p5).
- 2.8. Universities Scotland identifies a number of necessary actions if the aims of an internationalisation strategy for Scotland are to be achieved. These include, branding, reputation building, investment, in-country preparation for students prior to arrival, monitoring of the education provided, enhancing quality and innovation.
- 2.9. The paper refers to the moral role of an internationalisation strategy - beyond securing economic advantage for Scotland and Scottish institutions. This includes partnership programmes with other countries to exchange management and academic staff, countering the effects of developed countries employing professional workers from developing countries, where feasible, removing barriers to greater mobility for Scottish students as part of their courses, and capacity-building for institutions in developing countries.
- 2.10. Three measures are proposed to monitor progress towards internationalising:
 - measuring how international the Scottish higher education sector is in terms of staff and students
 - measuring how well Scotland is competing in the international higher education market
 - measuring the influence that Scottish higher education has on the world stage.

3. Quality Assurance Agency (QAA)

<http://www.qaa.ac.uk/>

- 3.1. The quality assurance agencies in the UK (QAA and QAA Scotland, and its predecessor, the Higher Education Quality Council) have maintained a strong international focus that has supported and guided institutions' in their varied patterns of internationalisation. The QAA's work is aimed at providing benefits to students as well as institutions, and student bodies (such as the National Union of Students (NUS) and sparqs, student participation in quality Scotland) are closely linked or involved in key aspects of QAA's work.
- 3.2. The past two years have seen QAA strengthen its role in Europe, both through support of the UK-based Europe Unit and through Board level representation in the European Network of Quality Agencies (ENQA) (<http://www.enqa.eu/>). Within ENQA, QAA was active in the development of the Bologna Process 2005 standards and guidelines for the quality assurance of higher educationv (<http://www.enqa.eu/files/BergenReport210205.pdf>) in Europe and the Agency's experts have also been involved in the development of Council of Europevi and OECD/UNESCOvii guidance on transnational education.

- 3.3. QAA works in the UK and internationally with the British Council as well as with overseas governments and international agencies and in the almost ten years of its existence, has become one of the leading quality assurance organisations in the world. The Agency's new strategic plan (2006-11) (<http://www.qaa.ac.uk/aboutus/strategicPlan/2006/Strategicplan06-11.pdf>) has as one of its five strategic themes, 'Working for the World' on the basis that:

"Globalisation of higher education is developing rapidly and is already impacting in UK higher education...European and other international developments will become even more important over the period of this plan" (QAA, 2006, p20).

- 3.4. Specific developments that are envisaged within the next five years include:
- further development of European quality assurance standards and guidelines (including elements of a European standards infrastructure, a European Qualifications' Framework and changes to the European Credit Transfer System)
 - methods for closer policing of transnational education, with the potential development of international accreditation processes
 - further audits of partnerships between UK institutions and overseas providers to ensure that the UK degree brand is protected
 - development of bilateral co-operation agreements with agencies in other countries where there are clear benefits to the QAA and the UK in terms of exchanges of information and experience.
- 3.5. Quality review in Scotland is different from that elsewhere in the UK. Scotland has pioneered an 'Enhancement-led Institutional Review' (ELIR) that includes students as full members of review teams and which has drawn extensively on international expertise from the US, Australia, Canada, New Zealand, Finland and France (UNESCO). QAA Scotland continues to promote the interests of Scottish higher education in Europe, in the Bologna Process, and elsewhere in the world. A particularly close relationship has been built with South Africa.
- 3.6. The QAA reports that their international work is both increasing and of growing significance. The 'borderless higher education' phenomenon has seen the rise of international consortia of universities, the emergence of new providers, the evolution of a range of collaborative arrangements and growth in the range of delivery modes for higher education programmes. Meanwhile, countries and regions have been developing their own systems of higher education with particular mixes of provision and providers, both local and international, alongside their own regulatory and quality assurance frameworks. Use - and abuse - of the Internet (in terms of fraudulent educational information, products or services) has increased alongside legitimate activity.
- 3.7. Within this increasingly complex international context, QAA reports the development of new regional Quality Assurance networks in Asia Pacific, South America, the Caribbean region and potentially, the Middle East. There are also increasing numbers of international agreements and joint exchanges between such networks, agencies and international governmental organisations. The QAA has formalised two such agreements (with South Africa and Malaysia) with more in the pipeline. In the past, international quality assurance activity has either been responsive to institutions' activities or has kept pace with developments. In future, international quality assurance arrangements are likely to play a stronger role in determining the shape and scope of internationalisation in institutions.

4. Department for Education and Skills (DfES)

- 4.1. The DfES published an international strategy for education, skills (and children's services) in 2004 (<http://publications.teachernet.gov.uk/eOrderingDownload/DfES10772004.pdf>). The vision that underpins the strategy is that:

"The people of the UK should have the knowledge, skills and understanding they need to fulfil themselves, to live in and contribute effectively to a global society and to work in a competitive global economy". (p1)

- 4.2. At various points, the strategy refers to a changing international context, for example:

"Our economy is global...one in four UK jobs is related to international trade and a much higher proportion faces direct or indirect global competitive pressures...Few forecast any slowing down of globalisation"(p6)

"The best forecast is that total global demand for international tertiary education student places will continue to increase from some 2.1 million in 2003 to some 5.8 million by 2020viii. This market is, however, likely to be much more competitive and will require a coherent approach to maintaining the quality and value for money of UK provision" (p17).

"Market pressures, combined with the impact of new technology and constraints on capacity in the UK, point towards more courses being delivered overseas, either on UK offshore campuses or through partnership arrangements".

- 4.3. The strategy contains three interrelated goals and a programme of action that relates to domestic education policies and to engagement overseas. Those that are relevant to this project include the following:

Goal 1: Learning in a Global Context

- instilling a global dimension into the learning experience of young peopleix
- promoting generic and specific skills for a global economyx through programmes such as the EU's Leonardo and Erasmus initiatives that provide placements, exchanges and study abroad opportunities for students and the EQUAL initiative that promotes entrepreneurship, adaptability and innovative approaches to teaching
- improving transparency and mutual recognition of qualifications through active work in Europe to give effect to the Bologna process and its various themes
- work with EU partners to negotiate and implement a new integrated EU Lifelong Learning programme for 2007-13.

Goal 2: International Partnerships

- learn from others through benchmarking against world-class standards (reflected in reforms of higher education and its funding in England, participation in the work of the OECD and learning on a thematic basis through conferences and seminars).
- building capacity to engage strategically with a wide range of partners (through such mechanisms as 'the Global Gateway', launched in 2004 as an international website for the exchange of information on educational partnerships and services) (<http://www.globalgateway.org.uk/>)
- realising the Lisbon goal (including increasing the number of graduates in mathematics, science and technology and the percentage of the adult working population engaged in lifelong learning)

- working with UN agencies, the World Bank, G8 the Commonwealth and EU to develop and offer educational support programmes and exchanges for Africa and other parts of the developing world.

Goal 3: Contributing to trade and investment

- supporting universities, colleges and other providers to access overseas' markets, building on the success of the first phase of the Prime Minister's Initiative
 - continue to fund scholarship programmes for students from around the world
 - promote best practice in the provision of support to overseas' students when in the UK
 - identify and promulgate best practice in ensuring that the presence of overseas' students adds to the quality of the education experience of home students
 - support universities in developing strategic partnerships that improve the long term research, innovative and productive capability of the UK
 - continue to promote the UK as an international leader in the creative and supportive use of ICT for education
 - encouraging education providers to work internationally with business.
- 4.4. The strategy envisages that action would be taken with a range of stakeholders, that no new requirements would be imposed on education providers and that there would be investment in leadership and staff development to achieve sustainable change and engagement with international partners.
- 4.5. The Department's international work is spread between a Joint International Unit (shared with the Department of Work and Pensions) and the HE Directorate in the DfES. The former deals with trade issues (such as GATS)^{xi} while the latter covers European issues such as Bologna and wider international agendas as set out in the strategy document (which is now due for revision). There are links between the DfES and the British Council (and FCO), between the DfES and Office for Science and Innovation (OSI) (<http://www.dti.gov.uk/science/>) in relation to science and research and to DfID's international agendas and funded programmes for development and capacity building. UKTI was also party to the development of the DfES' international strategy.
- 4.6. The DfES reported a number of developments since the publication of this strategy. The European agenda has increased in political importance, with the publication of three communiques from the Commission on universities and their role in society and the economy since 2003.^{xii} The DfES is participating in 'the modernisation agenda' through benchmarking and exchanges of experience in 'peer clusters'. It will also host the next meeting of Ministers (in relation to Bologna) in May 2007. A forward-looking theme is proposed: "What will European universities look like when reformed?"
- 4.7. In the wider international arena, the DfES is contributing to the second phase of the Prime Ministers' Initiative (see section on the British Council below). PMI2 aims to facilitate the development of more structured relationships with overseas' partners, to open doors (through Ministerial-led export missions) and to assist the sector in having a more outward focus through learning from other countries. This shift in focus from the first stage initiative recognises that the overseas' market is 'more volatile, and unpredictable in new ways'. Perhaps in recognition of this context, the DfES also now convenes a high-level policy forum every six months (beginning early in 2005) for agencies and departments to exchange information on international developments.

5. The Scottish Executive

- 5.1. The Scottish Executive developed an International Strategy in 2004 (<http://www.scotland.gov.uk/Resource/Doc/26350/0025712.pdf>) and an International Development Policy in 2005 (<http://www.scotland.gov.uk/Resource/Doc/37428/0024786.pdf>). The latter is complementary to the work of DfID, while the former is linked closely to the work of the Foreign and Commonwealth Office and the British Council.
- 5.2. The Strategy starts from the premise that:

"international activity is not an end in itself, but must support Scottish interests"...
- 5.3. The strategic goals for Scotland's international activity for 2004-2007 are:
 - to position Scotland internationally as a leading small nation, attractive to potential overseas' partners and visitors with a thriving and dynamic economy
 - to bring effective influence to bear on the UK Government, other countries, regions and institutions on international policy issues affecting Scotland; and within the scope of the Executive's devolved responsibilities, to encourage and support Scotland's contribution to international development.
- 5.4. In relation to these goals, there are four key priorities. These are recorded below, including those of particular relevance to higher education. The Executive aims to support and complement activities which institutions undertake individually and through bodies such as Universities Scotland.
 - growing Scotland's economy - encouraging Scottish companies to develop international business and helping overseas companies do more business in Scotland; attracting overseas students and world class researchers to diversify the profile and funding of Scotland's higher education institutions...
 - delivering excellent public services - contributing to the development of education internationally, promoting a range of Scottish educational products and promoting a positive image of Scotland through co-operation and exchanges...
 - supporting stronger, safer communities - promoting excellence in culture and sport including initiatives and exchanges to promote quality and diversity
 - developing a confident, democratic Scotland - championing Scotland's place in the wider world.
- 5.5. The Development Policy focuses on:
 - support for developing countries especially through the development of NGOs. Specific development programmes would also be provided, with the geographic priority being Sub-Saharan Africa as well as regions affected by the 2004 Tsunami. The thematic priorities include education, health and water, prevention of HIV/AIDs and civil society development.
 - assistance during times of crisis including fund raising, distribution and emergency response.
 - active consideration of the positive impact of Scottish policies on the developing world, for example through the curriculum in schools, through conferences and through relations with business and community groups.

6. Welsh Assembly

<http://www.wales.gov.uk>

- 6.1. The Welsh Assembly published its Strategy for Higher Education^{xiii} in 2002. The introduction states:

"Higher Education makes a vitally important contribution to increasing the prosperity of Wales as a whole. No country in Europe or beyond can nurture the best possible prospects for its people without strong, entrepreneurial and successful institutions of HE playing a major role in the development of the knowledge economy".

- 6.2. Within this Strategy document, there is a section on 'International Markets and Comparators'. The focus is on creating international links, attracting international students and international marketing. The rationale underpinning these activities states:

"International links make a significant contribution to sustaining Wales' profile world-wide and allow Welsh HEIs to benchmark against the best and remain productive on a national basis."

"International students offer an important funding stream for institutions".

"We think it is important that Wales has a united face internationally, and that the sector as a whole takes a strategic approach to international collaboration...there needs to be a step-change in performance for the future."

- 6.3. The strategy is to be underpinned by funding schemes including bursaries to support links with overseas institutions, funding to attract academics with international reputations to Wales and for student exchanges, particularly at postgraduate level.

7. Department for Employment and Learning Northern Ireland (DELNI)

<http://www.delni.gov.uk/>

- 7.1. DELNI produced a new 'Strategic Approach to International Activity' in March 2006 (http://www.delni.gov.uk/del_international_strategy-mar_06-2.pdf). The purpose of the document is to provide a framework for programmes and activities supported by the Department and to identify how the Department can add value to work carried out by the education and training sector in Northern Ireland. It is comprehensive in scope and higher education is central to its focus.

- 7.2. The context described in the document is of:

"increased globalisation of economies, trade and services creating challenges for all countries worldwide..."

"As a region of 1.7 million people on the western edge of the European Union, with increasing competition from both developed and rapidly emerging developing nations, it is even more imperative that we maximise our opportunities for international collaboration and involvement".

- 7.3. The international strategy seeks to enable Northern Ireland to remain competitive on an international stage, develop strategic international partnerships, attract inward investment, skilled workers and high calibre overseas' students. The authors state that:

"this outward, forward looking approach offers the best means of securing our place in the world for the benefit of all citizens of Northern Ireland...and...through proactive engagement on the global stage and the development of a clear strategic approach to international activity, we can maximise our abilities to perform as a global player"...

...and comment that international activity is most effective if it is carried out in a coherent and co-ordinated way, working in partnership across local and central Government, business and the education sector.

7.4. The key principles underpinning DELNI's strategic approach to international activity are:

- developing the skills and competencies to compete in a global economy through exposing individuals to global issues, and nurturing in them an appreciation of cultural diversity; and
- maximising the contribution of the tertiary sector, including university research, to overseas trade and inward investment, by encouraging strategic partnerships and opportunities for international collaboration.

7.5. The strategic document lists a wide range of activities of relevance to institutions' international strategies. A sample of the Department's current and future activities include the following:

- working with partners to make progress within Europe towards the mutual recognition and improved transparency of qualifications
- supporting FE and HE institutions in the promotion of opportunities for outward mobility of Northern Ireland students and staff
- promoting exchange programmes which encourage international co-operation in work-based training and facilitate long term business to business partnerships
- promoting the role of universities as international hubs for learning and research
- funding scholarship programmes
- assisting HE and FE establishments in developing collaborative links with prestigious institutions of strategic importance to Northern Ireland and in accessing new overseas markets
- promoting Northern Ireland as a key destination for international students
- promoting best practice in the provision of support to overseas students in Northern Ireland and...best practice in ensuring that the presence of overseas students adds to the quality of the education experience of home students
- encouraging the enhancement of foreign language skills
- encouraging and supporting institutions in the further development of trans-national education at quality-assured overseas campuses
- consider the relevant issues surrounding the implementation of the new EU integrated Lifelong Learning programme for 2007-2013 in relation to vocational education and training and higher education in Northern Ireland.

8. UK Trade and Investment (UKTI)

<https://www.uktradeinvest.gov.uk/>

8.1. UK Trade and Investment is the lead government organisation that provides support for UK companies looking to develop their international business - and overseas' companies wishing to invest in the UK (Scottish Development International plays a similar role in Scotland). Support is provided in two ways: by giving business advice and by introducing companies to overseas' markets. UKTI works closely with the Treasury, and with its parent departments (the FCO and DTI), the British Council, the nine English Regional Development Agencies (RDAs) and the devolved administrations in Northern Ireland, Scotland and Wales. UKTI acts as the international trade arm of the RDAs.

8.2. The primary responsibility for the 'domestic' education and skills' sector lies with the DfES, including related international activity. However, the UK's education and skills sector is now recognised as a major attraction for foreign direct investment into the UK as well as an export industry in its own right. For example, the UKTI's Education and Skills' sector team reported in November 2005 that the exports of this sector were worth £12 billion annually, making the UK a world leader. The core constituents of the sector as defined by UKTI include activities of relevance to this project:

- the export of distance and e-learning programmes to international customers
- attracting international students, pupils and trainees to UK universities, colleges, schools and private sector skills' organisations (around 325,000 international students study at 120 universities and 450 colleges in the UK)
- the export of education and skills-based consultancy and training
- the export of UK-derived qualifications, examinations and standards (about 3 million students take UK exams overseas)
- academic and vocational skills delivered overseas
- the export of educational and skills-related equipment, books, software, materials and content.

8.3. UKTI published a new strategy document 'Prosperity in a Changing World' in July 2006 (<https://www.uktradeinvest.gov.uk/ukti/fileDownload/UKTIStrategyJuly2006.pdf?cid=391741>). As might be expected, there are many references to the international context for business (with parallels for institutions):

"The challenge of globalisation means competition is intensifying at a pace of change that is unprecedented. Companies are internationalising earlier and in novel ways. New communication technologies and falling transport costs are breaking down geographical barriers to trade and economic integration" (p5).

"In the midst of the biggest industrial and economic restructuring that the world has ever seen, the UK's prosperity depends on harnessing the best knowledge and skills from around the world and marketing our business strengths effectively overseas".

8.4. The main components of the strategy include:

- Marketing "Business UK". This includes working with universities and business schools to enable overseas students and alumni to act as supporters of 'Business UK'. The importance of foreign students as opinion formers when returning home is recognised by UKTI.
- Working with Business. Where universities and colleges are operating overseas and classified as 'private providers', there are many services of relevance to their overseas' operations. Success in attracting multi-national companies to the UK also offers opportunities for student work placements. Services are also relevant to universities' research and knowledge transfer agendas and to postgraduate students; the strategy recognises the importance of the academic base in the UK to foreign direct investment.
- Transforming the way UKTI operates. Among several changes in focus, structure and culture is an intention to concentrate overseas' network resources on particular countries. Many of these mirror the countries that feature in the international strategies of universities and colleges.

8.5. The export team reported that, to date, their main focus had been on vocational skills with links to the Association of Colleges (and more recently also to the Centre for Excellence in Leadership) rather than to higher education which was within the British Council's

remit. The team does assist the British Council with market research (for example on transnational education) and had a general interest in the internationalisation of higher and further education as a link to the strong business cultures in some overseas' countries. The team's main business links were with SME's, rather than universities, but this could be changing given the current Chancellor of the Exchequer's interest in the UK's research and development base as an opportunity for export and investment. There were also strong partnerships with publishers, educational equipment suppliers and English language associations.

- 8.6. The main connection to higher education for the inward investment team was through research and development opportunities in universities that were attractive to overseas' companies, particularly research that was close to commercialisation. Universities were of considerable importance and interest both because of the commercial potential of research and their human capital. UKTI provides a range of services of relevance to universities' internationalisation (and other) strategies. These include the 'Global Watch' website (that monitors technologies and universities around the world to identify R&D opportunities and good practice) (<http://www.globalwatchservice.com/>) and the 'Global Entrepreneurs' Scheme' (designed to assist the development of new businesses). There may be further potential in relation to guidance on work placement opportunities for students with overseas' companies.
- 8.7. UKTI has parallel agencies in other parts of the UK. For example, Scottish Development International (SDI) (<http://www.scottishdevelopmentinternational.com>), formed in 2001, aims to attract direct investment to Scotland. Of SDI's five main aims, two at least are relevant to higher education:
 - Helping to strike licensing deals between Scottish and overseas companies and universities.
 - The attraction of direct foreign investment, concentrating on research and development projects with high knowledge content.

9. Department for International Development (DfID)

<http://www.dfid.gov.uk/>

- 9.1. DfID was established in 1997 and a new White Paper has just been produced (July 2006) entitled 'eliminating world poverty: making governance work for the poor' (<http://www.dfid.gov.uk/wp2006/default.asp>). The White Paper is focused on eliminating poverty and covers a range of major global issues including building effective states, good governance, promoting peace and security, investing in people, managing climate change and reforming the international development system.
- 9.2. The global context as set out by DfID is a timely reminder that the phenomena of globalisation has many facets, both positive and negative:

"Trends such as rapid economic change, inequality, disease and competition for natural resources could all push developing countries further down the path to violent conflict... The scarcity of resources and climate change could stop development in its tracks". (p7)

"Our world stands at a cross-roads. There are reasons for hope: the energy and politics of 2005, the power of economic development to change lives, the way that our technological and scientific ingenuity can be put to the service of the world's poor, the rapid growth of multilateralism over the past century, and a growing awareness that global co-operation is needed to match global interdependence".
- 9.3. The agenda put forward in the White Paper relates to a range of university and college activities, particularly international collaborative research and development projects. Some of these activities form part of internationalisation strategies and are reported in

DfID's Paper, other commitments from the Department represent new opportunities for institutions:

- The UK is investing in partnerships between researchers, international companies and people in developing countries - community groups, the media and private sector - to exploit science to fight poverty.
- The UK has a strong record in working with developing countries to improve the capability of public institutions. Technical assistance - often comprising specialist staff and training - offers new ideas and ways of working.
- New support is pledged for higher education and vocational skills training to train the professional staff needed by health and education services.
- Universities and colleges have a role to play in debating issues, generating new ideas and influencing opinion. DfID plans to double its investment in development education, set up a scheme to assist in building links with developing countries, expand opportunities for volunteering and support internship programmes for young people to work with NGOs.

10. British Council

<http://www.britishcouncil.org/>

10.1. The British Council is the UK's main cultural and educational liaison and marketing service and the majority of universities and colleges in the UK are members. The Council produced a new strategy in 2006 entitled 'Making a world of Difference: Cultural relations in 2010' (<http://www.britishcouncil.org/home-about-us-worldofdifference.pdf>). This describes the Council's continuing focus on 'education and training, sport, English language teaching and learning, the arts, science, governance and human rights'. It also sets out the Council's aim to be a world authority on cultural relations, English language teaching and the international dimensions of education and the arts. The Council lists three objectives for its work:

- Improved perceptions of the UK in other countries
- Greater mutual understanding between the UK and other countries
- Stronger ties between the UK and other countries -

within an overall purpose: 'to build mutually beneficial relationships between people in the UK and other countries and to increase appreciation of the UK's creative ideas and achievements'.

10.2. The strategy document refers to the context of 'a changing world'.

"The world in 2010 will be different in ways that are hard to predict. Many of the challenges that the world community faces together revolve around culture".

"The ideological tensions created by globalisation - which is often interpreted and feared as westernisation - are as much about national values and identity as about strategic and economic self-interest".

10.3. The strategy lists some of the challenges and opportunities facing the UK; many of these are part of the context recognised in institutions' approaches to internationalisation:

- The rising importance of the UK's relations with China and India and other emerging powers
- The UK's desire to support positive change in Africa

- The UK's role in an enlarged European Union
- A big increase in demand for international education, which is set to grow from 2.1 million international student places in 2003 to 5.8 million by 2020
- Half the world's population speaking or learning English by 2015
- Global networks for the free exchange of ideas, coupled with the need for new ways to promote access to the internet for marginalised communities
- The need to respond to the causes of militancy and their impact on both the populations of the countries in which the BC operates and the security of the BC's people and customers
- The impact of migration on national identity and intercultural relations.

10.4. The British Council's strategy includes a re-structuring process in the UK and in their overseas' locations. Overseas' activity will be focused in thirteen regions to promote efficiency and dialogue across regions. The Council is responsive to requests from regions for projects, research and consultancy.

10.5. Some of the Council's services that are targeted at students include: the Education UK website (<http://www.educationuk.org/>) listing 450,000 UK courses, advice and information on UK education delivered overseas, virtual services to students on UK courses and new services for alumni. Institutions are now offered: a new web-based market information and intelligence service, new education information and training resources supported by an elearning platform, a strategy to increase the effectiveness of education agents working on behalf of UK providers and a local partners' portal for partners who work with UK institutions to deliver UK qualifications in their own countries.

10.6. The British Council has a range of funding sources; its parent department and core funding is from the Foreign and Commonwealth Office (FCO) (<http://www.fco.gov.uk/>). It has joint programmes with DfID and the DfES. The Council's priority countries mirror those of the FCO. The Council currently has a specific responsibility for developing and implementing the strategy for the second stage of the Prime Minister's Initiative (for HE and FE) (<http://www.britishcouncil.org/eumd-strategies-pmi-ie.htm>), acting as liaison from the UK to the target countries. Our Council respondent described PMI2 as 'developing a real international strategy for the UK', with 'the glue of PMI2 being positioning and enabling'. The Initiative will operate at different levels - policy, research, institutional activity and programme grants. The key levers for delivery of the strategy are the Strategy Group (with membership including the British Council, DfES, UUK, the Association of Colleges, Learning and Skills Council, English UK and UKCOSA) and the funding of £27 million over two years. This includes earmarked funding for particular country-focused programmes in India, China, Russia and Africa. An important partner in relation to the student experience is UKCOSA.

10.7. Key elements of PMI2 include:

- Refreshing 'the UK brand' so that it is more distinctive and modern
- Developing a campaign for visas and the new points system
- Emphasising 'employability' for students (rather than migration as in the US or Australia) in the marketing of the UK. This includes work experience and part-time working.
- Creating a more enabling environment for partnerships between the UK and other countries
- Demonstrating a shift in institutional approaches to internationalisation to indicate a move from 'recruitment to partnership' - and development and collaborative agendas

- An emphasis on broad-ranging internationalisation strategies and linkages between research collaborations, staff exchanges, student recruitment and transnational education.

11. UKCOSA: the Council for International Education

<http://www.ukcosa.org.uk/>

- 11.1. UKCOSA is the UK's national advisory body for international students and those who work with them. UKCOSA's members include all UK universities, further and higher education colleges that are active internationally and a range of specialist and representative bodies. The Council's services include research, publications, a national training programme, dedicated advice lines and liaison and advocacy with institutions, agencies and government. UKCOSA's staff deal in a practical and detailed way with matters that affect the quality of international students' experiences of UK higher and further education.
- 11.2. In its Annual Review for 2005-6 (<http://www.ukcosa.org.uk/images/ar2006.pdf>), UKCOSA lists some of its recent achievements. As with Universities' UK, a major pre-occupation has been changes and developments in immigration policies that are impacting on international student applications and recruitment. UKCOSA has been a leading member of the Joint Education Taskforce set up by the Home Office in 2005 as the main forum for discussion on immigration, visa policies and the controversial DfES' 'Register of Learning Providers'. Other lobbying exercises for UKCOSA have focused on changes to the Science and Engineering Graduates Scheme, proposals to remove appeal rights for international students, and visa charges. The Council has also been active in developing or interpreting official guidance (for example on banking and money laundering) and on monitoring the effect of Student Support and fees regulations. These areas of work are of considerable importance to members, as evidenced by the number of calls and the nature of advice sought: on immigration, fees and student employment rights and opportunities. UKCOSA's national and in-house training programme and annual conference also play a key part in updating members and contributing to the professional development of those involved in student recruitment and support.
- 11.3. UKCOSA's research provides an important source of data on students' experiences of UK higher and further education. The survey results of 'Broadening Horizons' published in 2004 (<http://www.ukcosa.org.uk/survey/report.pdf>) have provided a focus for developmental work with institutions, student bodies and government on many areas of guidance and support that were reportedly of concern to students. These covered a wide range of issues from initial information overseas to accommodation, finance, immigration, aspects of teaching and learning, contacts with UK students and the local community and in particular, employment and future careers. UKCOSA comments that the variable level of support received by students has a fundamental effect on their levels of satisfaction with their UK higher education experience; and this finding should raise widespread concern. Following a policy forum in 2005, UKCOSA proposed a co-ordinated national effort to address international students' concerns including:
- benchmarking aspects of the student experience of greatest importance to international students
 - regularly monitor the degree to which experiences were meeting expectations
 - investing further in essential support services
 - significantly expand related professional development
 - significantly widen international student careers and employment opportunities and advice.

- 11.4. These proposals remain on the national agenda and one vehicle for tackling some of them could be the second phase of the Prime Minister's Initiative in which UKCOSA has a particular role in leading on elements that relate to the quality of the student experience. UKCOSA's own priorities in 2006-7 include working with UNITE on the new international component of their Student Experience Report (<http://www.mori.com/polls/2005/pdf/unite-international.pdf>) and completing and publishing a major survey of international students in further education.
- 11.5. UKCOSA has a number of associate members, including the Irish Council for International Students which was established in 1970 as an independent, non-governmental and non-profit organisation to promote the general welfare of international students in Ireland.

12. Higher Education Academy (HEA)

<http://www.heacademy.ac.uk/>

12.1. The Higher Education Academy's first Strategic Plan (2005-2010) (<http://www.heacademy.ac.uk/documents/StrategicPlan2005.pdf>) states that providing 'an international perspective' is one of the underpinning commitments of the Academy's work. The Plan contains one specific objective that addresses an international agenda:

- to promote best practice in the internationalisation of the student learning experience -
- as well as reference to collaborative activities with other organisations to provide strategic advice in a competitive international environment.

The Strategic Plan refers to new challenges for institutions and higher education staff including: *"increased competition from overseas providers... and growing international perspectives on curricula and standards issues"*.

12.2. The Academy's Operational Plan (for 2005-6) offers a commitment to work with higher education institutions and their staff to support them in developing and delivering the internationalisation of the curriculum and to enhance the learning experience of international student populations. In support of this agenda, the Academy funded an internal scoping study and a scoping event to identify a focus and priorities for its internationalisation activities. The scoping event identified an agenda that the HEA is taking forward. It includes:

- research and literature reviews (two projects are underway);
- Subject Centre and other special initiatives to support the internationalisation of the curriculum at disciplinary levels (the Academy is supporting several seminars and events);
- the gathering of case-studies (a call has gone out to institutions and networks);
- a supportive website (web pages dedicated to internationalisation are under development);
- support in the development of internationalisation strategies (a programme of consultancy for individual institutions and the networking of common interests is envisaged in relation to how institutions are addressing the need for global perspectives within curricula).

12.3. The HEA is working with other agencies such as UKCOSA, the British Council and the Europe Unit on relevant aspects of PMI2 and the Bologna Process and with the Leadership Foundation, UUK and SCOP in relation to institutions' internationalisation strategies.

13. Observatory on Borderless Higher Education (OBHE)

<http://www.obhe.ac.uk/>

- 13.1. The Observatory on Borderless Higher Education was established in 2001 by the Association of Commonwealth Universities (<http://www.acu.ac.uk/>) and Universities UK as an international strategic information service on 'borderless higher education issues', targeted at policy makers and institutional leaders and managers. It is principally a web-based subscription service and its members are higher education institutions and policy agencies in many parts of the world.
- 13.2. The current scope of 'borderless higher education' encompasses online learning, transnational provision, corporate and for-profit providers of HE. However, the geographical and content-based scope is constantly broadening as new developments emerge (such as international quality assurance and regulatory matters, global and regional HE consortia, or intellectual property issues related to elearning). While the principal focus has been on higher education, many borderless developments, by their nature, cut across traditional boundaries of level (further, higher, tertiary, continuing professional development) and types of provision (private, public, corporate). The Observatory combines a foresight agenda - through its Breaking News' service and other media - with trend and market analyses, and focused evidence-based reports on specific topics. The organisation has developed a strong reputation as a provider of independent cutting-edge international data and perspectives on borderless education in a field that is fast-moving and subject to considerable media and market hype.
- 13.3. Beyond its publications and web-based resources, the OBHE undertakes primary research and consultancy. Current examples include a regular annual survey across Commonwealth universities into institutional strategies for on-line learning and regular tracking of the activities of publicly traded education-related companies (to produce the 'Global Education Index'). This aims to assess particular companies' relative strengths and impact on more traditional higher education providers and provision.
- 13.4. As with other agencies and departments, the OBHE is a partner with other organisations in the UK and overseas' and is able to draw on these international networks to provide high quality intelligence to its subscribers. The OBHE has contributed a small international survey on national and regional internationalisation strategies to this HEA project.

14. Leadership Foundation for Higher Education (LFHE)

<http://www.lfhe.ac.uk/>

- 14.1. The Leadership Foundation for Higher Education was established in 2004 to provide tailored programmes, research, support and advice on leadership, governance and management development to the higher education sector. Institutions subscribe to the Foundation and are able to purchase specific services including open and tailored programmes, consultancy and knowledge-based resources. In the Foundation's initial three-year start-up phase, a grant from the Funding Councils has also provided opportunities for institutions to bid for research and development projects on relevant topics. The LFHE's vision is that the leadership, governance and management of UK higher education institutions should be regarded as world-class.
- 14.2. The LFHE has three cross-cutting principles, including 'adopting an international perspective' to bring the best of international practice and learning on leadership into programmes and services; and offering programmes to overseas markets. The context in which the LFHE was established echoes the drivers reported by other agencies, for example:

"a rapidly changing landscape for HE nationally and internationally".

14.3. The Foundation undertook early research to establish the nature of the strategic challenges facing institutions between 2005 and 2010. Several of the fifteen challenges identified in this survey have an international dimension, but one points to a more specific focus in terms of:

"internationalisation - competition and collaboration - private universities, European research area, Bologna process".

14.4. The Foundation has developed an international strategy with specific objectives including:

- to bring international perspectives and experience into all programmes and projects of the LFHE for the benefit of UK participants - as institutions, professional communities and individuals
- to assist UK institutions and individual senior managers and leaders to identify international practice that will assist the development of their institutions and themselves
- to develop international opportunities that will enhance the reputation of the UK higher education sector (and the LFHE as a key partner of the sector)
- to assist in building leadership and management capacity within universities, colleges and higher education systems in other countries.

14.5. The Foundation works closely with other departments and agencies including the HEA, British Council, UUK and DfES. It also has a close relationship with the OBHE by sharing a researcher to monitor and publicise international developments that could have an impact on UK institutions' leadership, management and governance agendas. The LFHE has set up an international reference group with membership from around the world to inform its work. Capitalising on this network enabled the Foundation to mount an 'International Leadership Summit' in 2006 with a focus on 'leading internationalisation' in different world regions and at different levels of an institution. The accompanying publications were designed to be useful for the development of institutions' international strategies (<http://www.lfhe.ac.uk/publications/leadershipsummit2006.pdf>).

15. Higher Education Funding Council for England (HEFCE)

<http://www.hefce.ac.uk/>

15.1. HEFCE published a free-standing international strategy in 2003, as part of the Funding Council's overall strategic plan for 2003-8 (<http://www.hefce.ac.uk/partners/world/strategy/strategy2003.pdf>). In this strategy, the Council declared that it worked in partnership with a range of agencies to deliver its international remit (for example, UUK, SCOP, British Council and government departments) and that its small international team and £500,000 p.a budget supported activities of direct benefit to international collaboration and development for the English higher education sector. HEFCE's research and development programme also funded international comparative studies.

15.2. This strategy document makes specific reference to the global context, referring back to the 2003-8 strategic plan which:

"acknowledges that HE is viewed world-wide as being central to a competitive modern economy and an open and inclusive society. A major challenge for the sector and the country is to support the needs of the knowledge society by providing world-class HE in a global economy that is becoming ever more complex and subject to change."

15.3. The international strategy goes on to list specific challenges for HE:

- HE is operating in a global market where competition will continue to intensify
- Leading academics and researchers are attracted to universities that offer the best facilities and rewards
- There is increased student mobility, and international students are targeted ever more aggressively by institutions throughout the world
- New technology, including e-learning materials and the Internet, will enable students who are not geographically mobile to select the provision that best meets their needs, regardless of where it is developed.
- European activities are assuming a higher profile and the impact on HE looks set to continue and increase following the Bologna Declaration, follow-up agreements and EU higher education and research initiatives.

15.4. The document records that HEFCE engages in three types of international activity:

- Learning from others (as a contribution to policy development, benchmarking comparative performance and continuous development for the sector)
- Supporting HE systems development (as a means of enhancing the sector's reputation, to enhance international understanding, to share knowledge and good practice)
- Facilitating opportunities for international collaboration and development (through joint projects, research and benchmarking studies, briefings and visits and development of a large database of international contacts).

15.5. In 2006, HEFCE published a new strategic plan for the period 2006-11. In this document, there is no separate international strategy, instead references to international activities and targets are related to the main strategic aims. Increasing global competition is a recurrent theme. (http://www.hefce.ac.uk/pubs/hefce/2006/06_13/06_13.pdf). Examples from the strategy include:

15.6. In relation to learning and teaching:

“HE faces growing international competition. HEIs in the UK already compete with institutions from other countries to attract overseas’ students to study on campus here or through distance learning. In the future they may also face increased competition in the UK as learners already based here are increasingly able to choose from private and other international providers of HE.”

15.7. The strategy states that HEFCE will assist HEIs in this territory by promoting a distinctive high quality brand for UK HE, by supporting them in addressing the impact and implications of the Bologna Declaration and by further supporting the inclusion of ‘an international dimension to the curriculum’. However, none of these these actions are not represented in the Key Performance Targets listed for teaching and learning.

In relation to research:

“The nations that thrive in a highly competitive global economy are those which create new knowledge and transform this into commercial opportunities. To retain our economic strength we need to hold a strong international position in leading-edge research in the face of increasingly aggressive competition”.

15.8. To underpin HEFCE’s commitment to research, a Key Performance Target has been set, ie ‘to maintain England’s contribution to the UK’s leading international position in research

excellence throughout the planning period'. This target relates to the Office for Science and Technology's annually updated 'Public Service Agreement target metrics for the research base'.

15.9. In relation to HE's contribution to the economy and society (in addition to teaching and research):

"As a nation we need to explore and redefine our sources of comparative advantage in the face of more challenging competition (from countries such as China and India), and to move beyond competing on price towards competing increasingly in innovative and high value-added markets...the HE knowledge base...[is a] source of the country's global competitiveness"...

In addition,

"We are facing greater challenges – and opportunities – to live in a peaceful and intellectually and culturally stimulating world. We live in a globally connected world, yet often struggle to understand and enjoy the diversity of other peoples, as well as the multiculturalism in our own nation... [HE] provides resources for intellectual and cultural enrichment that make the world a more exciting and vital place to live."

15.10. In support of the strategic aim in this section, HEFCE proposes to consolidate and extend the Higher Education Innovation Fund and to develop targeted initiatives to enable HE to play a part in meeting the nation's global challenges. Three areas are mentioned: reaching out regionally to new sectors, promoting more global partnerships devoted to innovation, and highlighting the social dimension. Cross-cutting developments with an international dimension are also highlighted, for example, links to the EU agenda on the knowledge-based economy and engaging with the needs of the developing world. There are no specific Key Performance Targets linked to these activities.

Section 3: Conclusions

1.1 The survey demonstrates the emphasis placed by national agencies on 'growing competition and increasing internationalisation' in their policies towards higher education and other UK sectors. There is wide scope for institutions to relate their international or internationalisation strategies to policies, targets and funding opportunities at national level. While at national level the predominant rationale for international engagement and activity is economic (with slightly differing emphases in different parts of the UK) there is also mention of other rationales including academic and developmental agendas.

ⁱ The Bologna Process is an intergovernmental initiative which aims to create a European Higher Education Area (EHEA) by 2010 and to promote the European system of higher education worldwide. It now has 45 signatory countries and it is conducted outside the formal decision-making framework of the European Union. Decision-making within the Process rests on the consent of all the participating countries. The Bologna Process was launched in 1999 when Ministers from 29 European countries, including the UK, met in Bologna and signed a declaration establishing what was necessary to create an EHEA by the end of the decade. The broad objectives of the Bologna Process became: to remove the obstacles to student mobility across Europe; to enhance the attractiveness of European higher education worldwide; to establish a common structure of higher education systems across Europe; and for this common structure to be based on two main cycles, undergraduate and graduate.

In its drive to improve the quality of higher education and, in turn, human resources across Europe, the Bologna Process will play a key role in contributing to the EU's Lisbon Strategy goals which aim to deliver stronger, lasting growth and to create more and better jobs.

ⁱⁱ When Heads of State and Government met at the Lisbon European Council summit in 2000 they set the ambitious goal to make the EU 'the world's most competitive and dynamic knowledge economy by 2010'. Higher education is seen as crucial to the success of this Lisbon Strategy.

ⁱⁱⁱ The second stage of PMI has a target of recruiting an extra 100,000 Further and Higher education international students to the UK. It also has a wider international agenda, focusing on building sustainable partnerships between UK universities and colleges and similar institutions in other countries. Its aims are to:

- Position the UK as a leader in international education
- Increase the number of international students in the UK
- Ensure that international students have a high quality experience
- Build strategic partnerships and alliances
- Maintain the UK's position in major education markets, while achieving growth in student numbers from a wider range of countries.

^{iv} Scottish Executive (2004) "New Scots: Attracting Fresh Talent to meet the Challenge of Growth". This strategy promotes Scotland as a place to live and work and includes a specific provision for overseas' graduates from Scottish universities who express the intention of living and working in Scotland, to stay on for two years to seek employment. The scheme began in 2005.

^v "Standards and Guidelines for Quality Assurance in the European Higher Education Area", Helsinki, European Association for Quality Assurance in Higher Education (2005). The European Network of Quality Agencies changed its name in November 2004 to 'the European Association'. This report forms the twin response to ENQA in the Berlin communiqué of September 2003 to develop 'an agreed set of standards, procedures and guidelines on quality assurance' and 'to explore ways of ensuring an adequate peer review system for quality assurance and/or accreditation agencies or bodies'.

^{vi} Council of Europe/UNESCO (2001) "Code of Practice in the Provision of Transnational Education", Paris, UNESCO.

^{vii} OECD (2005) "Guidelines for Quality Provision in Cross-Border Higher Education", Paris, OECD.

^{viii} Source - Vision 2020: Forecasting International Student Mobility - a UK Perspective, British Council/IDP Australia, 2004

^{ix} To live in a global society, children and young people need an understanding of eight key concepts:

- Citizenship, Social Justice, Sustainable development, diversity, values and perceptions, interdependence, conflict resolution and human rights (DfES, 2004, p6)

^x Generic skills for a global economy, as evident in international best practice include:

- The ability to work comfortably in multi-national teams
- Knowledge of different business methods, legislation and ways of working
- Understanding and appreciating different cultures
- Feeling confident when working in and with other countries (DfES, 2004, p8)

^{xi} The General Agreement on Trade in Services (GATS is a framework agreement for trade in services, including education services, published by the World Trade Organisation in 1994. The GATS divides services into four modes of supply (in education services, this corresponds roughly to programme, student and provider mobility):

- Mode 1: cross border trade (e.g. distance education and e-learning)
- Mode 2: consumption abroad (e.g. international students travelling to foreign universities and colleges)
- Mode 3: (commercial presence (e.g. a branch campus overseas)
- Mode 4: temporary movement of persons as service suppliers (e.g. lecturers teaching overseas)

Further detail can be found in OECD (2004): "Internationalisation and Trade in Higher Education: opportunities and challenges", OECD, Paris.

^{xii} Communication from the Commission, "The role of universities in the Europe of Knowledge", Brussels, COM (2003) 58 final (05.02.03).

Communication from the Commission, "Mobilising the Brainpower of Europe: enabling Universities to make their full contribution to the Lisbon Strategy", Brussels, COM (2005) 152 final (20.4.05).

Communication from the Commission to the Council and the European Parliament (2006) "Delivering on the Modernisation Agenda for Universities: Education, Research and Innovation", Brussels, COM (2006) 208 final (10.5.06).

^{xiii} Welsh Assembly, "Reaching Higher, Higher Education in the Learning Country: A Strategy for the Higher Education Sector in Wales", March 2002, Cardiff, Wales. (<http://new.wales.gov.uk/docrepos/40382/4038232/4038211/40382121/reachinghigher-e.pdf?lang=en>)

Appendix 3: International Policy Context for Higher Education

1. International Policy Context for Higher Education

- 1.1. Our main source of data on the international policy context is a small-scale desk-based survey undertaken for us as part of this HEA project by the Observatory on Borderless Higher Education. Once again, we have sought evidence of 'increasing competition and growing internationalisation'. We also refer to recent OECD work on national-level strategies.
- 1.2. The OBHE report focuses on governments' strategies for higher education and states that in the past two decades, internationalisation has become an increasingly important phenomenon for the higher education sector of most, if not all countries. Support for this claim comes from a survey undertaken by the International Association of Universities (IAU) in 2005 in which just under half of the responses from government agencies indicated that internationalisation was a high priority and only 1% claimed it was of no importance. As with our wider study, de Wit (1999) and Knight's (2003) definitions of internationalisation and analysis of rationales for internationalisation are adopted as a framework for the study.
- 1.3. The OBHE study confirms the findings of de Wit and Knight that economic rationales are increasingly the driving force behind national strategies for higher education, with specific short and long-term objectives varying from country to country. The study analyses national strategies in terms of three approaches to internationalisation:
 1. Internationalisation provides a short-term as well as long-term economic contribution to the country and the higher education sector. *Countries: the US and Australia*
 2. Internationalisation provides limited immediate financial contribution to the country and institutions, but a perceived long-term contribution to the society as a whole. *Countries: Denmark and Germany*
 3. Internationalisation is actively encouraged as a way of enhancing or creating a knowledge-based society. *Countries: Singapore, Malaysia, United Arab Emirates, South Africa, China, India and the Dominican Republic*
- 1.4. A range of indicators for internationalisation (but not all possible indicators) were examined at both national and institutional levels. These are international student recruitment, export of education, participation in exchange programmes, study provision in English or in other languages for English-speaking countries, and development of joint or double degrees. Other factors such as research collaboration and participation in consortia, internationalisation of curricula, and internationalisation of non-academic units, such as student unions, residence halls and career centres, could also be useful indicators, but were beyond the scope of the study. The indicators adopted arguably place strong emphasis on international student recruitment and on the import and export of transnational education. However, examination of the rationales behind other activities such as exchanges, research collaboration and joint degree programmes, seems to indicate that economic competitiveness (of the country and its workforce) is also a driver here.
- 1.5. In addition, Harman (2004) has argued that, for example in Australia, the export of education has led to other aspects of institutions being internationalised, such as curricula and student services, and has increased the importance of the recognition of qualifications across borders. Harman suggests that wider internationalisation efforts only began in the 1990s in Australia, following an earlier focus on international export of education that was criticised as being too narrow. There are potential parallels here with the current situation in the UK.

a) Internationalisation provides a short-term as well as long-term economic contribution to the country and the higher education sector (US and Australia)

1.6. Education export, both at home and abroad, is making a significant financial contribution to both the higher education institutions and the overall economy. In at least one of the exemplar countries, many institutions have become heavily dependent on income from international students, a trend that has not proved entirely uncontroversial. In addition to international students' academic and economic contributions through their study period, recruitment of such students is also aimed at meeting longer-term national needs. Both the US and Australia have policies in place encouraging highly skilled graduates to remain in the country for longer or shorter periods after completing their studies and to assist in meeting the demands of the labour market.

1.7. Whilst both Australia and the US are based on a federal structure with responsibility for higher education being partly held at state level, there are great differences in the way that the central government is involved in policy making and strategic development. In Australia, the Commonwealth government has been active in forming internationalisation strategies and policies and it is widely agreed that this has contributed to Australia's success in becoming a major study destination. National bodies such as the Vice-Chancellors Committee, IDP and the Australian Universities Quality Agency arguably all contribute to a sense of cohesion that has advantages in an international context.

1.8. In the US, the federal government has to a much larger extent left it to the states and national and regional bodies to develop strategies and policies. However, there are signs of change. Early in 2006, the federal government convened a University Presidents Summit to address concerns over falling international student recruitment. Subsequently, the US has developed its first marketing strategy for overseas' recruitment through the Education US brand and is seeking to improve co-ordination of its activities in support of international recruitment.

International student recruitment

1.9. Whereas the US has for years been a magnet for international students, Australia's position as a major study destination has been reached more recently, through a concerted strategic effort.

1.10. Unlike the US, the country arguably does not have a longstanding tradition for international student recruitment or an international reputation for higher education delivery, and the transformation to major exporter has only taken place within the last couple of decades.

1.11. Between 1990 and 2000, numbers rose by close to 300% and the proportion of foreign students in the higher education sector rose from 5 to 14% over the same period (Harman, op cit.). A total of 228,000 international students were recorded in 2004 by DEST, with 24,000 of them enrolled offshore (this is likely to be a serious underestimation of real figures) (DEST, 2004). The majority of students enrolled in Australian institutions are from neighbouring Asian countries. In addition to their academic contributions, international students are estimated to bring more than A\$1.8 billion (£722 million) a year to Australian institutions. In 2002, it was estimated that 18% of total university income came from international student tuition fees. If living expenses are included, total education export is estimated to bring in well over A\$2 billion (more than £800 million) to the Australian economy a year (Harman, op cit).

1.12. Factors behind the success of Australian international recruitment are reported by Harman (Harman, op cit.) as being government support, financial incentives for institutions, high satisfaction rates amongst international students, high completion rates, the possibility of staying in Australia upon graduation and the fact that Australia is already a multicultural society. Other important factors include the dominance of English as the 'lingua franca' of

higher education and other sectors, geographical proximity to some of the major markets, the significant economic development experienced in some of these countries and a competitive advantage in terms of price and exchange rates compared to Australia's main competitors, the UK and the US.

- 1.13. In terms of sheer numbers, the US is the leading international student destination. In 2004-05, approximately 565,000 international students were enrolled in the country's higher education institutions. It is estimated that international students generated approximately US\$13 billion in tuition fees in 2005. In addition to the financial contribution, international recruitment contributes to research and industry and to fostering good will abroad. Overall, it is suggested that the US reputation for providing high quality education is a large factor in its recruitment success. However, policies for allowing overseas students to remain in the country upon graduation for a period of time and the US traditional reputation as a diverse and welcoming society for foreigners are likely to have had a positive impact as well (Institute for International Education, 2005).
- 1.14. While positive legislation appears to contribute to successful international recruitment, 'negative' government policies and perceived attitudes can potentially have an adverse effect. Following tightened security and visa policies across the US after September 11th, in 2003-04 academic year, the US experienced an overall decline of 2.4 % in enrolments. This was the first time that the number of international students in the US had dropped since 1971-72. There are signs that the situation is improving with only a decline in enrolment of 1% between 2003-04 and 2004-05 and proposed marketing campaigns may assist further (Institute for International Education, op cit.).
- 1.15. It is doubtless too simplistic to attribute the fall in recruitment figures entirely to the changes in policies and a perception of the US as being less welcoming to foreigners. An increasing number of serious players in the international recruitment market and more domestic study options for students in some of the key markets (such as China, India and Malaysia) are also likely to have had an impact. However, it has been argued that due to fierce competition in the international education market, changes in such matters as visa regulations have a significant impact when students are weighing their study abroad choices.

Transnational delivery

- 1.16. There is little comprehensive information on countries' provision of higher education programmes abroad (i.e. transnational education). However, research by the OBHE and others points to the main players being the US, the UK and Australia.
- 1.17. The latest study undertaken by the Australian Vice-Chancellors' Committee indicates that Australian universities together offered close to 1,600 programmes abroad in 2003. There is greater uncertainty as to the total number of students enrolled on such programmes, however, these are estimated at being in excess of 100,000 (AEI and DEST, 2005).
- 1.18. There is no comprehensive data on US provision. However, examination of provision in places such as China and India indicates that American institutions are very active in the transnational higher education area. The country also has the most established tradition for branch campus developments and dominates this field with campuses being established as early as the 1970s and 1980s.
- 1.19. The two countries' governmental approaches to transnational delivery have been very different. Perhaps in line with other aspects of policy making for the higher education sector, the US government has allowed the sector to develop its transnational provision without any regulatory interference. Whilst Australia has not (yet) attempted to directly regulate and legislate in the area of transnational provision, the government seems to be increasingly concerned with this activity because of the financial and reputational risks involved. Education Ministers from all of Australia's states at a meeting in November 2005

agreed a strategy for transnational education (AEI, 2005). The strategy is aimed at ensuring that the “quality of Australian education and training delivered in other countries remains at the forefront internationally”. It is also intended that the strategy will enable students, parents and overseas governments to make informed decisions concerning Australian off-shore provision and lead to increased protection and strengthening of the country’s bona fide transnational providers. In addition, two of the guiding principles for the strategy state that Australia’s quality assurance arrangements should be well-understood and well-regarded internationally and that transnational programmes should be equivalent in standard and delivery to those provided in Australia (OBHE, 2005a).

- 1.20. US off-shore programmes have generally developed and been delivered outside a national framework (although regional accreditation has provided guidance). The American Council on Education actively encourages internationalisation in institutions and is planning a survey of transnational delivery to provide an indication of the level of activity. The Council also recently published a check-list for cross-border education, following a joint declaration with the International Universities Association and the Association of Universities and Colleges in Canada in 2004 that recognised the importance of international guidelines on transnational delivery. However, there are as yet no binding requirements on institutions and no federal guidelines.

Participation in exchange programmes

- 1.21. Through its support for major study abroad schemes such as the Fulbright Program and the Benjamin A Gilman International Scholarship Program, the US government has supported student mobility and exchanges for decades. The Institute for International Education which is also in receipt of government support plays an important role in informing students on study abroad opportunities and collecting data on activities.
- 1.22. Whilst the number of American students studying abroad has increased over the past few years, the proportion is still relatively low compared to many continental European countries. According to IIE, 191,000 US students studied abroad in 2003-04 (this does not appear to include students who undertake their entire tertiary studies abroad). 73% of students undertaking a placement abroad were sponsored solely by their institution and the remaining 27% by other institutions and organisations. Only 6% of students who studied abroad did so for a full academic year while 38% studied abroad for a semester. According to IIE, more than a third of students go abroad during their junior year (indicating the popularity of the Junior Year Abroad scheme) followed by 20% during the senior year and 17% at unspecified Bachelor’s level. In 2003/04, 61% of all US students abroad studied in Europe; however, students have shown increasing interest in study destinations such as India and China (Institute of International Education, 2005)
- 1.23. The Australian government has since the early nineties supported specific exchange programmes, such as the University Mobility in Asia and the Pacific Programme (UMAP) and the Targeted Institutional Links Program, which focuses on research. A survey undertaken by IDP Australia in 2005 estimated that there were at least 3,000 Australian full degree students studying abroad, the vast majority of these on exchange programmes (and this is assumed to be an underestimate). (Institute of International Education, op cit.)

Joint degrees

- 1.24. Joint degree programmes are one of the latest features of internationalisation and appear to be a rapidly growing model of provision. Whilst joint degrees offer opportunities to extend collaboration with other institutions and enter new markets with relatively low investment, they have also raised a range of issues at the national and institutional level. The legislative framework for awarding joint degrees, administrative issues concerning tuition fees, entry qualifications, examination methods and quality assurance responsibilities are just some of the considerations that institutions and countries participating in joint degree development have had to face. As yet no countries seem to

systematically collect information on the number of programmes offered on their soil or the level to which their domestic institutions are involved in joint degree provision, so that it is difficult to estimate the precise level of activity. However, both Australia (IDP Education Australia, 2006) and the US (Europa, 2006) are collaborating with the EU in pilot projects, while the US also has bi-lateral agreements for joint degrees with Chinese institutions (OBHE, 2005). The purposes of these arrangements include staff and student mobility, the development of mutually recognised credit transfer arrangements, joint curriculum development and innovation and academic recognition between countries.

b) Internationalisation provides limited immediate financial contribution to the country and institutions, but a perceived long-term contribution to the society as a whole (Denmark and Germany)

1.25. It is suggested that in many of the countries in this category (mainly in Continental Europe), this approach replaced an internationalisation strategy based primarily on educational, political and cultural factors in the 1990s (de Wit, op cit.). An ageing population and concern over a potential shortage of skilled labour as well as the issue of brain drain have also contributed to the desire to attract foreign talent. Internationalisation has been increasingly concerned with making the country's higher education sector more attractive to students and researchers, thereby keeping domestic students in the country and attracting international talent as well. That does not mean that some of the more cultural and development oriented activities are no longer taking place. These countries are still supporting activities in developing countries and offering support for students to undertake training and education programmes abroad. Exchange programmes are still very much encouraged as a way of facilitating cultural and academic co-operation and preparing students for their careers in a globalised world, arguably also resulting in a more competitive labour force.

1.26. Government strategies on internationalisation have had a substantial impact on the higher education sector in both of the exemplar countries. This can probably be attributed to the relatively strong government control over institutions in both countries, connected to a high dependence on public funding in both systems.

1.27. The drive to internationalise the German tertiary sector started in the mid-1990s and has largely focused on enhancing the international reputation and attractiveness of German higher education and developing a 'European dimension' within the sector. The government and other key stakeholders are increasingly emphasising the need for a competitive higher education sector (as a benefit to German economy and society) and shifting the emphasis from partnerships and academic exchanges with capacity-building overseas as a key component. However, a change in rhetoric at the central level has not yet substantially altered the type of activities encouraged and undertaken by the federal government (OBHE, 2005c).

1.28. Examination of the activities to date arguably supports this point. German activities appear to be based on a top-down approach, with government-driven, small-scale export focused on collaborative agreements, post-graduate study, resource intensive subject areas and relatively low intakes of students. In the domestic context this is reflected by the fact that Germany still does not on the whole charge international student tuition fees.

1.29. An internationalisation strategy for Denmark was released by the Danish government in spring 2004. Alongside the announcement that non-EU and EEA students would in the near future be charged tuition fees for studying at Danish higher education institutions, the strategy is encouraging institutions to offer more programmes in English and promoting Danish higher education as well as exploring opportunities to offer e-learning programmes at the international level (OBHE, 2004).

International Student Recruitment

- 1.30. Both countries have become increasingly concerned with international student recruitment, but approaches differ. The German government has invested significant resources in promoting German education internationally, institutions are becoming more visible and students are still not on the whole charged tuition fees. Denmark has opted for an introduction of fees for non-EU/EEA students and the government provides limited financial support for recruitment to the sector. Not surprisingly given the substantial difference in size, recruitment figures differ significantly between the two countries.
- 1.31. The federal German government has allocated substantial resources to making the country a more attractive study destination for international students. There has been funding support, policies aimed at recruiting more foreign students, legislation making it easier for foreigners to obtain work permits and changes to the overall length of stay, as well as new regulations to make it easier for students to switch their areas of study. A key player in the internationalisation process in Germany is the Deutscher Akademischer Austauschdienst /German Academic Exchange Service (DAAD), which received approximately 200 of its 238 million budget in 2004 from the federal government (DAAD, 2005a).
- 1.32. A brief examination of international recruitment to Germany indicates that the country has been successful in attracting a higher number of international students. In 2000-01, approximately 187,000 foreign students were enrolled in higher education institutions, an increase of 23 % compared to 1996-97. In 2002-03, the number was reported to be 224,000, accounting for approximately 10% of the total tertiary student population. Although the number of foreign students might be misleading (there is a significant number of "domestic foreigners," mainly children of migrant workers who are considered non-citizens in this context), enrolment figures point to an increased interest in Germany as a study destination (Federal Ministry of Education and Research, 2005). The country's share of the international higher education market does not appear to have changed between 2000 and 2003, however, as Germany accounted for 11-12 % of international students enrolled in OECD (and partner countries) (in third place after the US and the UK) in all three years (OBHE, 2005c). Over half of the foreign students enrolled in 2002-03 came from other European countries, although Asia is a growing market. The most commonly cited reasons for choosing Germany as a study destination are opportunities to improve language skills, benefiting from better study conditions and acquiring specialist knowledge (Federal Ministry of Education and Research, op cit.).
- 1.33. One of the main outcomes of the Danish government's internationalisation strategy published in 2004 concerned the introduction of tuition fees for non-EU/EEA students. With growing numbers of international students enrolling in Danish institutions and a cap on public spending, the government became reluctant to fund international students. However, there is no sense at the moment that recruitment will provide a significant source of income for institutions. Numbers are unlikely to be sufficiently high, at least initially, and fees charged appear to be based on what it costs to educate the students making it difficult to cross-subsidise certain areas or fund entire courses/provision. Even countries with a more longstanding tradition for international recruitment such as the Netherlands do not appear to be generating institutional income from international students.
- 1.34. Whilst the number of foreign students in Denmark has increased during recent years, they still account for a relatively low percentage of the student population. According to OECD data, in 2001 6.5 per cent of all students enrolled in Danish tertiary institutions were non-Danish citizens (this method of defining international students as all non-Danish citizens might overestimate the actual number of students not ordinarily resident in the country). In 2004-05, approximately 10,500 international students were enrolled in Danish higher education institutions, an increase of 11% compared to 2003. Of these, just under half are enrolled on full degree programmes with 44% originating from other Nordic countries, 14% from other EU/EEA countries and 42% from countries outside the EU/EEA.

There were an estimated 280 foreign students studying for a PhD in Denmark in 2004-05 (CIRIUS, 2006a).

Transnational delivery

- 1.35. The German government has over the past few years increased its support for German transnational provision. The scale of delivery and enrolment is still limited, but the country is enhancing its presence in many places with courses continuously being added. Denmark on the other hand seems virtually non-present in the market; however, the government has in its internationalisation strategy encouraged institutions to consider export of online provision.
- 1.36. As part of its support for the overall international promotion of the German higher education system, the German government provides funding for the export of transnational provision. Through the DAAD operated programme 'German Study Programmes Abroad' initiated in 2001, higher education institutions can obtain financial assistance to start various types of transnational programmes. Any projects put forward for financial support had to be "entrepreneurial", with a clear indication of how long-term economic viability would be secured once the government funding ended (i.e. other sources of income such as tuition fees, private investments, subsidies from the source institution had to be outlined). Citing the success of the first round, the BMBF made additional funding available in 2004 (OBHE, 2005c). To date, 26 projects have been established with funding from DAAD. These include the creation of new institutions, such as the German University in Cairo and the Wadi German Syrian University and provision in partnership with local providers. There are currently an estimated 4,100 students enrolled on such programmes, paying an average of 4,000 Euro (approximately £2,700) per academic year. Provision is primarily in engineering and social sciences (including economics), and more than half of the 26 current projects are situated in Asia. The target is to have approximately 80 programmes with a total enrolment of 10,000 students by 2008 (DAAD, 2005b).
- 1.37. There is no comprehensive and centrally collected information on the export of Danish transnational education, but it seems to be limited. Some of the more vocationally oriented institutions are reported to be exporting programmes to Russia and Eastern Europe (Adam, 2001).

Exchange programmes

- 1.38. Both Germany and Denmark show relatively high levels of international exchange programmes, facilitated in large part by the major EU mobility programme Socrates-Erasmus and other national or regional schemes.
- 1.39. In 1992, the EU set a target that 10% of students at some point during their education should undertake a period of study abroad. Since 3.3% of German students are studying abroad each year, following completion of their studies, 15% of all German graduates will have undertaken a period of study abroad. More than 20,000 students participated in the Erasmus programme in 2003-04 (European Commission, 2006).
- 1.40. One of the priorities in the Danish government's internationalisation strategy from 2004 was to increase the number of students studying abroad as a part of their tertiary education. Expansion of the universities' individual networks and exchange agreements were mentioned, as well as the ambition that all higher education institutions should have an Erasmus University Charter so that they are eligible to participate in the EU funded mobility programme (CIRIUS, 2006b).
- 1.41. The country participates in a range of international programmes, such as the EU funded Socrates-Erasmus, and Tempus programmes and the Nordic mobility programmes Nordplus/Nordlys, funded by the Nordic Council of Ministers to promote co-operation in higher education between the Nordic countries, Greenland and the Faroe Islands. In

addition, each Danish institution or departments within institutions have a range of bilateral agreements across the world.

1.42. CIRIUS has estimated that the number of Danish students studying abroad for either part of their tertiary programme in Denmark or the entire qualification to be around 8,500 in 2004-05. Of these, 55% were undertaking a placement abroad, mainly through an exchange programme. Approximately 25% of the students studying abroad undertook a placement through the Erasmus scheme in 2004-05. The number has been relatively unchanged over the past ten years (whereas for example the number of students from Finland and Iceland going on Erasmus placements has doubled). Since 1998-99, Denmark has received more incoming Erasmus students than it has sent out. The number of incoming students was almost twice as high as outgoing in 2004-05. The most popular study destinations for Danish students were the UK, Germany, Spain and France, whereas most incoming students came from Spain, France and Poland (CIRIUS, 2006c).

Provision in English

1.43. Both Denmark and Germany have developed considerable provision in English to attract international students and provide opportunities for domestic students to obtain a high level of proficiency in English.

1.44. Germany was reported to offer approximately 300 programmes in English in 2003. In addition, the language of instruction for just over a third of the transnational programmes is English, with a quarter taught in the local language and German, and 17% in the local language only (OBHE, 2005c).

1.45. Since the 1980s, Danish higher education institutions have had the opportunity to offer specially designed programmes in English targeting international students. Such programmes have not been eligible for any financial support from the state and students have covered the full costs through tuition fees, which can be up to 198,000 DKK (approximately US\$ 31,000) for an MBA. Whilst an increasing number of institutions offer such programmes, mainly targeting professionals, provision is usually limited to 1-2 programmes per institution. At 'traditional' undergraduate and post-graduate level, the country offered approximately 90 programmes in English in 2004. Courses in IT, technology and business accounted for two thirds of these (Undervisningsministeriet, 2004). It has been reported that the national technical university is planning to offer all its post-graduate provision in English from the next academic year. For the higher education sector as a whole, it has been estimated that approximately 7 per cent of degree programmes in Denmark are provided in English (OBHE, 2004a).

1.46. Whilst both countries have expanded their English language provision in an attempt to attract more international students, they have also, however, made it clear that the language of the higher education system continues to be the national language. There are obvious issues connected to this approach of recruiting international students who are generally not proficient in the local language. Whilst the content of courses can relatively easily be translated into English, overseeing the quality of provision together with the ability of faculty and other staff to provide information, guidance and advice in English are also important matters for internationalised institutions. Questions might also be raised over the opportunity for international students to participate in all aspects of university life if, for example, official meetings and minutes, student union matters etc are all only available in the local language (OBHE, 2006a).

Joint degrees

1.47. A major driver for the development of joint degree programmes in both countries is the EU funded Erasmus Mundus programme, which was initiated in 2001 and came into operation in 2004. The overall aim of the programme is to strengthen European co-

operation and international links in higher education through support for joint Master's degree courses. Financial support for the development of approximately 100 programmes, which involve at least three institutions in three countries, and for participating students from countries outside the EU/EEA, has been made available (Europa, op cit.).

1.48. A paper prepared for the 2005 Bologna meeting in Bergen stated that in the first round of the Erasmus Mundus applications, German institutions were involved in 13 of the 19 approved proposals. DAAD at the time promoted about 20 joint degree programmes (Federal Ministry of Education and Research, 2005). In addition, the Franco-German University and the German-Italian University Centre offer joint degree programmes. A study conducted by the European Universities Association in 2002 estimated that German institutions were offering a total of 300 joint degree programmes. It was suggested that approximately half of these programmes were offered in collaboration with French institutions (World Education News and Reviews, 2004). The overall figure is now likely to be significantly higher.

1.49. In its internationalisation strategy from 2004, the Danish government encouraged the country's institutions to participate in joint degree offerings. According to CIRIUS, nine Danish universities are currently involved in the Erasmus Mundus programme (CIRIUS, 2006d). A government report from 2003, states that there is a Danish-Swedish joint programme in horticulture, Danish-German degree collaboration in business and Danish-English joint programmes in marketing and finance (Ministry of Science, Technology and Innovation, 2003). Another example is the Niels Brock – Copenhagen Business College which, since 2000, has offered joint degree programmes in co-operation with Chinese universities. Approximately 800 Chinese students were reportedly enrolled on such programmes in 2004 (CIRIUS, 2006b).

c) Internationalisation is actively encouraged as a way of enhancing/creating a knowledge-based society (Singapore, Malaysia, the United Arab Emirates, South Africa, China (excluding Hong Kong SAR), India and the Dominican Republic)

1.50. The countries in this category exhibit a range of approaches and are not characterised by the same economic circumstances; on the contrary, there is great variety in economic performance and developments and internationalisation activities have been initiated much more recently in some than in others.

1.51. The common goal is to become less dependent on the current basis of the economy (e.g. manufacturing in the case of Singapore, the oil industry in the case of United Arab Emirates) and to move to become a knowledge-based society able to compete in the global economy. The specifics of the strategies vary from country to country, but they have all in some ways used internationalisation as a means to develop their economies.

International student recruitment

1.52. The countries in this category fall into two sub-divisions when it comes to international student recruitment. The first utilises (and plans to increasingly utilise) imported foreign provision to attract international students. Singapore, Malaysia, the United Arab Emirates and (more recently) the Dominican Republic fall into this category. Countries in the second category (e.g. South Africa, China and India) are mainly focused on attracting international students to their domestic institutions, although some of these students might end up being enrolled in transnational provision.

1.53. Singapore, Malaysia and the United Arab Emirates have all encouraged foreign institutions to establish a presence in the country. Singapore and the UAE in particular, have provided financial incentives to establish premises or have made available purpose-built facilities. The decision to attract foreign provision was in the first instance motivated by broader policy goals concerning economic development and the move to becoming a knowledge based society. In this connection, higher participation rates were identified as a

target in all three countries. In both Malaysia and the UAE, there have also been explicit ambitions to stem study abroad rates and curb brain drain. Whilst the countries have not necessarily reached the identified targets, they have all started to work towards exporting their imported education and becoming educational hubs for the region.

- 1.54. Singapore, mainly through its Global Schoolhouse project, has encouraged the import of transnational education. The following foreign institutions are involved in branch campuses, partnership agreements or joint ventures: INSEAD (France), University of Chicago Graduate School of Business (US), Georgia Institute of Technology (US), Johns Hopkins University (US), MIT (US), Shanghai Jiao Tong University (China), Stanford University (US), Wharton School of the University of Pennsylvania (US), Technische Universiteit Eindhoven (Netherlands), and Technische Universitat Munchen (Germany) (OBHE, 2005d). Australia's University of New South Wales is also to open in Singapore in 2007, enrolling an estimated 70 per cent non-Singaporean students (OBHE, 2005e). The number of international students currently studying in the country is estimated at 50,000, but government targets for foreign student recruitment have been set at an ambitious 100,000, as well as another 100,000 international corporate executives, within the next 10-15 years (Singapore Ministry of Education, 2004). The bulk of student recruitment is anticipated to be from China, India, Indonesia, Malaysia, and other Southeast Asian countries.
- 1.55. As one of the main sites of transnational activity, Malaysia has four fully-fledged branch campuses of foreign institutions and a large number of collaborative arrangements between local and foreign institutions. Similar to Singapore, Malaysia has ambitions to become an education hub for the region, and to attract 100,000 international students by 2010. According to the Malaysian government, there are currently 54,800 foreign students enrolled in the country. An online admissions system was recently introduced as part of the effort to attract more international students (OBHE, 2006b). The government is working closely with the private sector, which recruits more than 50% of Malaysia's current international students. Since 2002, private institutions have been required to register with the Ministry of Education if they wish to recruit international students. Malaysia has also opened a number of education bureaus in countries including China, Indonesia, Vietnam, the United Arab Emirates and South Africa to promote Malaysian higher education abroad (OBHE, 2003a).
- 1.56. The 'import and export' of higher education in the United Arab Emirates has been concentrated in Knowledge Village (KV), a free-zone established in Dubai in 2002. A range of foreign institutions, including three British or British-based, one Australian, one Irish, one Canadian, four Indian, one Belgian, one Iranian, one Pakistani and one Russian, have established a presence in KV. Enrolment targets are ambitious, with plans to increase numbers from 6,000 in 2004/05 (30% of which are international students) to 8,000 in 2005/06 (with a projected 50% coming from outside the UAE). The long term aim is to recruit 50,000 students by 2070, with 90% coming from abroad (OBHE, 2003b).
- 1.57. The Dominican Republic has in recent years started to focus on attracting foreign universities to the country in an attempt to develop domestic higher education capacity and increase overseas student enrolments. The President of the Dominican Republic recently announced that the US Stevens Institute of Technology will open the "first private sector high-tech/R&D university in Latin America" in the capital of Santo Domingo by the end of 2006. Enrolments are projected at 4,000 students within the next five years, with international enrolments, particularly from Latin America and other Caribbean countries, expected to make up half of the total cohort. English will be the main language of instruction, as this is perceived to be particularly valued by students across Latin America (OBHE, 2005f). This is part of the government's broader mission to establish the US\$250 million Santo Domingo Cybernetic Park (PCSD), a one-stop community designed to bring together business, education and technology. International students will reportedly be offered an internship or work experience term with companies based in the Cybernetic

Park, and the government of the Dominican Republic is reportedly seeking to open student recruitment centres in several Latin American countries (Stevens News Service, 2005).

- 1.58. The countries falling under the second category (e.g. South Africa, China and India) have not explicitly used transnational higher education as a means of attracting international students, although this situation may be changing, particularly in the case of the latter two. Both the Chinese and Indian governments have encouraged domestic institutions to collaborate with foreign institutions in an effort to internationalise the higher education sector and attract more international students to the country.
- 1.59. Over the past decade, India has increasingly adopted a pro-active strategy for recruiting international students in an effort to develop an internationally competitive knowledge-based economy. The University Grants Commission (UGC) has established the Committee for the Promotion of Indian Higher Education Abroad to promote the internationalisation of the domestic higher education system, and has set up overseas offices in several target markets to attract more foreign students to the country (Bhalla, 2005). The Indian government has set up a number of scholarship programmes to fund overseas students from Africa, Asia and increasingly the Middle East, including the Direct Admission of Students Abroad (DASA) programme which funds almost 200 foreign enrolments to Indian engineering schools each year. The growing trend towards import of transnational education could also have an impact on international student recruitment, with data from the UK and Australia already indicating a significant degree of foreign provision (OBHE, 2004b). Since April 2003, foreign institutions have been required to obtain accreditation from the All India Council on Technical Education, although there is currently no legislation enforcing these regulations and only two foreign institutions have to date secured AICTE approval. The Indian government is currently drafting legislation on the entry of foreign universities that would impose a number of new requirements for foreign higher education institutions (Bhushan, 2006). The correlation between imported transnational activity and international student recruitment remains unclear, but a recent study by the Association of Indian Universities (AIU) showed that the flow of foreign students to India has been increasing since 1996-97. There were 7,753 international students in India in 2003/04, up from 5,841 in 1996-97, with the highest proportion from Malaysia and Nepal (The Hindu, 2005). According to local news coverage, the Indian government has announced plans to “formally develop a more centralised and concerted recruitment strategy for foreign students in the near future,” although no further details have been released.
- 1.60. China is becoming an increasingly popular study destination, in part due to the government’s concerted efforts to propel the country into a knowledge-based economy. According to the Chinese Ministry of Education, there was a 43 per cent year-on-year increase in the number of international students at Chinese institutions of higher education in 2004. A record 110,844 students from 178 countries attended one of 420 institutions of higher education nationwide. Of that figure, 6,715 were sponsored by the Chinese government. The Chinese government has stated that by 2007, it hopes to attract 200,000 international students, and has signed a series of bilateral agreements to promote student and faculty exchanges. The government has also been heavily promoting the Chinese language and culture in recent years through the establishment of Confucius colleges worldwide. This comes in addition to the increasing popularity of short-term Chinese language programmes in China itself, as well as the Ministry of Education’s launch of a comprehensive English-language version of its website, which among other things is designed to promote study opportunities there (World Education News and Reviews, 2005). The growing trend towards transnational provision could also attract more international students to China. According to the 2003 decree concerning foreign education activity in China, there are currently 712 “approved” jointly-run education institutions in China, scattered across 28 provinces, municipalities and autonomous regions. ‘Jointly-run education institutions’ encompass activities ranging from co-developed new institutions, to a foreign degree franchised to an existing Chinese university, and

much sub-degree and non-degree provision at various levels of education (OBHE, 2003c). Large-scale examples of foreign provision include the UK Universities of Nottingham and Liverpool. The Chinese government has developed regulations for foreign provision, but there appears to be a significant gap between theory and practice with limited reinforcement or implementation. With improving economic conditions, growing domestic opportunities and increased transnational provision, evidence suggests that China could increasingly become a 'regional hub' for higher education.

- 1.61. Launched in 1997, the International Education Association of South Africa (IEASA) aims to take a proactive role in policy-making affecting international higher education and monitors the impact of government policy and procedure on international students and staff in the country. IEASA's membership includes public, but not (yet) private, providers. In 2002, IEASA developed a strategy for promoting South African higher education, focusing on student exchange and study abroad programmes, and a student recruitment consortia of South African higher education institutions has been successfully developed (Council for Higher Education, 2005). Imported transnational higher education does not appear to figure in South Africa's international recruitment strategy. South Africa is an example of a country having significantly tightened its regulatory framework for foreign institutions in an alleged attempt to align overseas provision with national developmental objectives. In 1997, South Africa's Higher Education Act was implemented to impose considerable restrictions on foreign providers, such as requiring overseas institutions to register as a company and assume responsibility for all aspects of provision (thereby effectively outlawing franchised programmes from foreign universities). Following 1997, the number of foreign higher education institutions operating in South Africa dropped from 38 to 4 (in 2004), although data from the South African Qualification Authority (SAQA) appears to underestimate the scale of activity. Overall, international students in South Africa at public tertiary institutions grew from 12,557 in 1994 to 46,687 in 2002. Students from southern Africa rose from 6,209 in 1994 to 31,724 in 2002, making South Africa one of the most rapidly growing study abroad destinations worldwide (OBHE, 2006c).

Transnational provision

- 1.62. There is a paucity of data on the scale or nature of transnational delivery by the countries included in this section. The majority export transnational provision (with the potential exceptions of UAE and the Dominican Republic), although none could be characterised as major players in the field. Nevertheless, some of the countries (e.g. Singapore and India) have announced growing ambitions to increase the export of education services, and there appears to be a growing trend towards South-to-South provision (particularly via distance learning). Government oversight of transnational provision in these countries (arguably with the exception of Singapore) tends to be minimal, and cross-border activity has generally developed outside a clear legal framework. Some of the main providers and larger-scale examples are offered only as an insight into provision.
- 1.63. Malaysia has begun to export educational programmes through two main off-shore providers. SEGi International has over 18,000 students enrolled at 14 locations in Malaysia, and is one of a number of large for-profit higher education networks in that country. In 2003, in its first major positioning internationally, SEGi established a joint venture with the Chinese company JPI Group, a conglomerate with an education arm, to offer franchise arrangements with five Australian, six UK and one Canadian university in China (OBHE, 2004c). Another major off-shore provider is INTI, established in Kuala Lumpur in 1986 with 37 students. Today, the institution has almost 14,000 students, five Malaysian campuses and five abroad in China, Hong Kong SAR, Indonesia, Thailand and Vietnam. In 2001, INTI opened a joint-campus with Lincoln University in New Zealand, offering English language and university foundation programmes to international students. Like all private colleges in Malaysia, INTI does not have degree-awarding powers. It offers degrees franchised from a range of universities, including Coventry, Hertfordshire, Leeds and Liverpool in the UK, Victoria and Otago in New Zealand and Adelaide, Queensland

University of Technology, Swinburne and Wollongong in Australia (OBHE, 2003d). The national distance learning provider Open University Malaysia has also announced ambitions to offer distance learning programmes across the Asia-Pacific region.

- 1.64. The National University of Singapore appears to be the most active exporter of education in Singapore. In 2004, NUS signed a partnership with China's Fudan University to establish the NUS-Fudan Joint Graduate School in Suzhou Industrial Park, China. Initially on offer have been professional development programmes, but plans are underway to introduce Master's programmes in Business, Science, Information Technology and Engineering (OBHE, 2006d). There is limited information on other off-shore programmes offered by other Singaporean institutions.
- 1.65. India is becoming an increasingly active player in exporting education overseas. The national distance learning provider, Indira Gandhi National Open University (IGNOU), is reported to be the fifth largest university in the world. Founded in 1985, it currently reports a total enrolment of over 1.4 million students across 31 countries (the proportion of students from outside India is not specified) (Indira Gandhi National Open University, 2006). Other major players include IT education firm Aptech, which has built up its own network of colleges and institutes offering a range of IT and related programmes, and in 2003 launched Aptech University to offer its own degrees (no details on enrolments are available) (OBHE, 2003e). NIIT, a leading Indian IT training and development firm based in New Delhi, trains over 500,000 learners per annum across 35 countries, with learning centres located worldwide. NIIT claims to be the first Indian company granted authority by the Chinese government to set up a wholly-owned foreign entity in China, and has set up 15 'Centres of Excellence' spanning 15 provinces in the country, designed to play an integral part in meeting Chinese government targets for software exports and professionals (NIIT, 2006). India's Institute of Management Technology (IMT) will open its first overseas campus in Dubai's Knowledge Village in September 2006 (OBHE, 2006e), and the Indian Institute of Management, Ahmedabad (IIM-A), one of the country's most prestigious institutions, has formed a partnership with one of France's leading business schools, Essec, to launch a business management programme in Singapore (OBHE, 2006f). IIM-A also offers a three-week certificate course in Cairo, designed to "train middle and senior-level executives of the Middle East and North African countries in general management practices." The Manipal Academy of Higher Education, Birla Institute of Technology & Science, Mahatma Gandhi University and Institute of Management Technology all operate branches in Dubai's Knowledge Village.
- 1.66. There is very limited information on transnational provision offered by China, in large part due to the limited government oversight over the sector. The main example is the Chinese government's ambition to establish one hundred Confucius Colleges around the world. Course content has been created by China's National Office for Teaching Chinese as a Foreign Language (NOTCFL). The first Confucius College was established in Seoul, South Korea in 2004, and over the past year operations have been opened in the Swedish capital of Stockholm and in Poitiers, France (OBHE, 2005g). Other Chinese universities active in exporting educational services (albeit on a small scale) include the Universities of Tsinghua, Peking, Fudan and Nanjing, although very few details are available.
- 1.67. The University of South Africa (Unisa) has become active in exporting distance learning programmes across the African continent. Unisa now has a student enrolment of over 200,000 and is one of the world's leading providers of distance higher education (Study South Africa, 2006). No information is publicly available on other South African transnational providers. In 2004, South Africa produced draft guidelines for the export of transnational education for the higher education sector. However, it is unclear whether compliance is to be monitored (OBHE, 2004d).
- 1.68. The UAE and Dominican Republic do not appear to be actively exporting transnational higher education.

Participation in exchange programmes

1.69. The majority of exchange programmes in the selected countries are co-ordinated either at an institutional level or through bilateral agreements. No list of exchange agreements per country exists, as these generally tend to be agreed on an ad hoc basis with limited government oversight. Out of all the study countries in this section, the governments of India, Singapore and particularly China appear recently to have been the most pro-active in signing bilateral co-operation agreements in education and encouraging higher education institutions to promote exchange programmes. OBHE research indicates that the vast majority of exchange agreements are carried out with the traditional study abroad destinations (e.g. the UK, US and Australia), with the exception of the Dominican Republic which has traditionally favoured partnerships with Spanish-speaking countries in Latin America. Local news coverage suggests that there are several student mobility schemes in Singapore and Malaysia providing financial assistance to exchange students, particularly in the Asia-Pacific region, although few details have been released. There is a growing trend towards implementing credit transfer systems and introducing more scholarships for exchange students across all the study countries.

Provision in English

1.70. There is a growing trend towards offering courses in English across all these countries, with a view to attracting more international students and preparing domestic students for the international labour market. Very limited information exists on the scale or nature of English language provision, but the following section highlights the main developments or policies (in the case of Malaysia) in place. India, South Africa and Singapore have significant English speaking populations, and therefore English is the main language of instruction (in addition to any regional languages). In these countries, for students who are weak in English, most colleges and universities conduct special language courses. The Dominican Republic, United Arab Emirates, Malaysia and China have increasingly turned to importing transnational higher education and/or foreign faculty in an effort to bolster English language provision.

1.71. In addition to inviting foreign institutions to offer English language provision, the Chinese and Malaysian governments have released official statements encouraging domestic universities to offer more programmes in English, although actual implementation measures remain unclear. The language of instruction for programmes offered in conjunction with foreign providers is typically English (e.g. MBA China from Cass Business School, City University, UK; International MBA from Jiao Tong's School of Management, China).

1.72. In February 2006, the Malaysian government announced that by 2007 public universities should teach all mathematics and science based degree programmes in English. Some institutions are already offering teaching and examinations in a choice of Malay or English, and the Malaysian government has recently encouraged institutions to offer other languages such as Chinese, Tamil and Arabic. It was also reported that an amendment to the Malaysian National Language Act is expected to reduce the current 70% minimum of the degree syllabus that must be taught in Malay to facilitate these new requirements. Current compulsory modules for foreign students in tertiary institutions, such as Malaysian studies, are also to be made optional (OBHE, 2006g).

Joint degrees

1.73. All the countries in this section are involved in offering joint degrees, although it is difficult to ascertain the exact level or nature of activity due to limited available information. According to research undertaken by the Observatory, the majority of joint degree programmes are in business and IT, and are generally offered in English (with the exception of the Dominican Republic) and developed on an ad hoc basis. In certain

saturated markets (e.g. Singapore and increasingly Malaysia), there is a trend towards offering more specialist or 'niche' joint degree programmes.

- 1.74. Joint degrees (in contrast to larger-scale or individual operations) might be perceived by foreign institutions as a means of penetrating new and emerging markets and reducing operational risk, although a lack of local expertise (e.g. Dominican Republic) and restrictive regulatory environments (e.g. South Africa) might limit the scale of joint provision in some countries. The following is only a selection of the larger-scale or interesting examples in a sample of the study countries.
- 1.75. According to a report released by the Indian National Institute for Educational Planning and Administration (NIEPA), approximately 47 out of the 131 (36%) foreign institutions operating in the country are offering joint degree programmes. The most recent examples include the UK's Lancaster University (LU) decision to launch a joint degree programme with the Indian Institute of Management, Bangalore (IIM-B), as well as a collaborative degree programme and a joint research initiative with the private Manipal Academy of Higher Education (MAHE) (OBHE, 2006h). In 2005, Universitas 21 Global, a joint venture between Thomson Learning and the U21 university consortium, signed a memorandum of understanding with the Nadathur S. Raghavan Centre for Entrepreneurial Learning at the prestigious Indian Institute of Management Bangalore (IIM-B) to create a joint "Entrepreneurship and Family Enterprise" post-graduate certificate programme. Programme delivery will include both online and face-to-face elements (OBHE 2006i).
- 1.76. Although no comprehensive list is available, the Observatory's research suggests that the UAE has a significant number of joint degree programmes on offer. In 2005, the UAE government formed a partnership with UK's Cambridge University to launch an ICT teacher training programme. iTeach is part of the government's IT Education Project (ITEP) to enhance IT awareness and integrate major online elements into pedagogical methods. Teachers successfully completing training in the iTeach programme are awarded the Cambridge International Diploma in teaching with ICT (DTWICT) (OBHE, 2005h). In other recent developments, Cranfield University signed a co-operation agreement with UAE's Dubai Aerospace Enterprise University (DAE) to provide a range of Cranfield-supported advanced and research degree programmes in aerospace and aviation on its site at Dubai's Jebel Ali Airport City. Cranfield is responsible for initiating and overseeing post-graduate research for the new institute and will be fully involved in structuring courses and establishing criteria for student selection and staff recruitment.
- 1.77. China also appears to be an increasingly active site for joint degree provision. According to the 2003 decree concerning foreign education activity in China, out of the 712 Sino-foreign programmes on offer, about one-tenth (72) were "approved joint degree programmes" with the "remainder... only authorised to offer certificates and diplomas." The official list from the Chinese Ministry of Education shows the breakdown of approved joint programmes leading to a foreign degree by country: USA (24), Australia (16), Hong Kong (11), Canada and France (5 each), Netherlands and UK (3), and Belgium, EU and Singapore (1 each). Almost 50% of these officially approved joint degree programmes lead to an MBA, with economics, IT and English language as the other major areas. A large proportion of joint degree programmes are reported to be arranged at the institutional level, although recent developments suggest a growing trend towards bilateral or multi-party co-operative agreements. An interesting example is the "Sino American 1-2-1 Joint Degree Programme," a joint initiative between the China Centre for International Educational Exchange (CCIEE) and the American Association of State Colleges and Universities (AASCU) to maximise higher education collaboration between the two countries. It is designed to enable Chinese students to complete the first year of undergraduate studies in their home country, study at a US institution for two years, and obtain two degrees after completing the final year in China. Six US universities are already involved in the programme (OBHE, 2005b).

1.78. In South Africa, a more restrictive regulatory operating environment for foreign providers (following the 1997 Act) may have limited joint degree provision (OBHE, 2005i). Limited information is available on joint degrees in Malaysia and the Dominican Republic, as both tend to have opted for a more large-scale (i.e. branch campus) model of provision.

2. Conclusion: an assessment of some international trends at sector level

a) International recruitment

2.1. Over the last few years, changes in international recruitment patterns have started to emerge. All three leading international recruiters (the US, UK and Australia) have either experienced some decline in international student applications overall, or specifically from some countries. The reasons for these changes are complex and include internal and external factors in each country. However, the OBHE suggests that the emerging regional hubs will increasingly become forces to be reckoned with as their higher education systems mature and become more internationalised. International students may increasingly look to these countries and regions for a high quality, less expensive education closer to home and in what might be perceived to be a more familiar and welcoming study environment.

b) Transnational education

2.2. The transnational market is likely to be dominated for a few more years by the current three major players: Australia, the UK and the US. These providers have a significant number of programmes operating, and Australia has notably started to address quality assurance issues and develop best practice guidelines. Transnational education continues to have a mixed reputation in some countries for providing low-cost programmes that are not always in line with national developmental needs. Provision with lower tuition fee costs, courses meeting local market demands or South to South provision may become increasingly popular. Few of the countries studied have explicit ambitions to raise their transnational provision; however, many of them are becoming increasingly active, usually with little or no oversight or encouragement from their governments.

c) Student exchanges

2.3. This indicator was the most difficult to assess, perhaps since most activity takes place at the institutional level with limited financial support from government in many countries. However, the limited information that is available seems to indicate a higher degree of mobility through exchange programmes in the European countries included in this study compared to, for example, the US and Australia. There are many reasons for this including opportunities available, potential language requirements, encouragement and support at institutional and governmental level.

d) Joint degrees

2.4. All countries seem to have been affected by this recent, but increasingly popular feature of internationalisation. Various incentives are driving this type of provision, for example financial support (e.g. Erasmus Mundus) and a perception that this is a less risky entry to unexplored or untested markets, or areas with high regulatory requirements. The emergence of joint degrees programmes has raised a range of issues that many institutions and countries have so far only started to address (such as credit transfer, recognition of qualifications and quality assurance).

e) Provision in English

2.5. Together with joint degrees, the increasing presence of programmes provided in English in non-English speaking countries seems to be a common trend amongst all the countries studied (with the obvious exception of the US and Australia – and the Dominican

Republic). It seems to be widely acknowledged, if not accepted or appreciated, that English has become the dominant language in higher education in most parts of the world and that successful international recruitment to some degree depends on sufficient English language provision. Some countries have introduced parallel programmes in English and maintain the local language (e.g. Germany and Denmark) whereas others rely on transnational import to provide education in English for international students (e.g. UAE and the Dominican Republic). Others are increasingly looking to offer all provision in English (e.g. Malaysia).

f) National-level rationales

- 2.6. Overall, the findings of the OBHE study confirm that economic rationales are increasingly shaping national approaches to the internationalisation of higher education. Internationalisation is widely perceived as a means of enhancing national competitiveness in the global labour market, both in terms of retaining domestic students and educating the local workforce (i.e. 'internationalisation at home') and also attracting international students both to the home country and overseas (i.e. 'educational export'). Across all the study countries, the overall trend points to increased government involvement in developing internationalisation policies, including changes to visa procedures, foreign language provision, bilateral agreements, etc, and a growing recognition of the economic added-value potential of educational exports.
- 2.7. Perhaps ironically, the more that economic rationales become the driving force behind the internationalisation of tertiary education, the more countries are likely to need to focus on other aspects of internationalisation including the student experience, curriculum development and student support. Indeed, as noted earlier, Harman (op cit.) suggests that in Australia an initial narrow focus on internationalisation in terms of educational export was criticised and resulted in a much wider focus within current practice as a means of retaining reputation and competitive edge. With the emergence of new competitors, particularly aspiring 'regional hubs', students world-wide will be presented with a growing array of study options and will increasingly become demanding consumers. The wide range of initiatives in train would appear to suggest that countries are recognising that internationalisation needs to offer long-term (including social and cultural) advantages. Only in so doing, through a sustainable and reputable model (or mix) of provision, will long-term economic benefits follow.

3. OECD perspectives

- 3.1. The Organisation for Economic Co-operation and Development (OECD) completed a study of "Internationalisation and Trade in Education" across North America, Asia-Pacific and Europe in 2004 (OECD, 2004). This study concluded that cross-border higher education (encompassing programme and institution mobility, as well as student mobility) had grown dramatically over the past twenty years, and diversified considerably, with projections of further increases in the years to come.
- 3.2. This report set out a different typology of national rationales for cross-border activity, encompassing four different approaches. However, there is overlap with other typologies and economic rationales are strongly evident. The four approaches are:
1. **Mutual understanding** - broad-based academic alliances between countries/institutions, concerned with research and teaching development, and involving modest faculty/student mobility. This includes student exchange and study abroad programmes and some development assistance (e.g. scholarships) to students/institutions in the developing world. This approach is portrayed as in decline, although many institutional/national activities still adhere to it. For example, the proportion of international students primarily funded by US universities or colleges rose from 9% to 21% between 1980 and 2002.

2. **Skilled migration** - national policies to recruit and retain international students to meet specific domestic skills shortages, in higher education (e.g. doctoral work in certain subjects) or wider employment. Many OECD member countries exemplify this approach to some extent, particularly those with ageing populations.
 3. **Revenue generation** - where international students pay at least full-cost fees, giving institutions a financial incentive to recruit; and in some cases, where providers operate offshore to meet demand and raise income. This approach is led by Australia, New Zealand, UK and USA.
 4. **Capacity building** - refers to national/ institutional drives to utilise various forms of cross-border higher education as a source of domestic capacity building. For example, foreign higher education might be used to train researchers in particular fields, stem brain drain, mentor new institutions and create an enhanced competitive environment that spurs domestic innovation. This approach is promoted by countries such as China and parts of the Middle East (e.g. Bahrain, Qatar).
- 3.3. Most countries and institutions are characterised by more than one approach, and the report cites a general trend towards the third approach whether in the form of charging international students higher fees, promoting higher education as an export or seeking financial return on previously aid-based/ mutual understanding-type projects.

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