

Executive summary

Internationalization of Higher Education: *Growing expectations, fundamental values*

IAU 4th Global Survey

Eva Egron-Polak and Ross Hudson

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Growing expectations, fundamental values

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The European Association for International Education (EAIE) is the European centre for expertise, networking and resources in the internationalisation of higher education. The EAIE is a non-profit, member-led organisation serving individuals actively involved in the internationalisation of their institutions. The EAIE equips academic and non-academic professionals with best practices and workable solutions to internationalisation challenges and provides a platform for strategic exchange. It offers a variety of training activities, topical publications and hosts an annual conference attracting thousands of higher education professionals from around the world. The EAIE also partners with key stakeholder organisations and institutions to promote its membership interests, and advance international higher education in Europe and the rest of the world.

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International Association of Universities (IAU)

Founded in 1950, IAU is a global association of Higher Education Institutions (HEIs) and university associations. IAU's mission is to strengthen higher education worldwide by providing a global forum for institutional and association leaders to discuss, examine and take action on issues of common interest. It is a membership organization which brings together about 630 higher education institutions from every region in the world, as well as more than two dozen national and regional associations. A number of specialized organizations have become IAU Affiliates and a growing number of individuals join as IAU Associates. Benefits of membership include a global forum for networking; scholarly and reference publications; original research reports; grants; opportunities to get involved in projects as well as advisory services on internationalization. IAU facilitates collective action for advocacy and develops normative statements on important issues in higher education which serve to raise Members' views and concerns in public debate with organizations such as UNESCO, the OECD, the Council of Europe, the World Bank and the European Commission among others.

The Association upholds the values of academic freedom and institutional autonomy, while promoting greater accountability, institutional responsibility and effectiveness, and the ideal of knowledge made accessible to all through collaboration, commitment to solidarity and improved access to higher education.

Internationalization of higher education is one of the IAU priority themes and the Association has a number of initiatives in this area such as:

- **Policy Statements and Guidelines** – *Towards a Century of Cooperation: Internationalization of Higher education* was the first IAU policy declaration on internationalization prepared in 1998. It was followed in 2004 by the statement produced by IAU in partnership with three other associations (Association of Universities and Colleges of Canada (AUCC), American Council on Education (ACE), and Council for Higher Education Accreditation (CHEA)) entitled: *Sharing Quality Higher Education Across Borders: A Statement on Behalf of Higher Education Institutions Worldwide*. To assist institutions in implementing the statement the same four Associations jointly issued related document: *A Checklist for Good Practice* in 2006. This checklist provides a series of questions to help institutions in designing and assessing their cross-border educational initiatives. In 2012, the IAU brought together an Ad-hoc expert group, made up of 28 internationalization experts from every world region. This group sought to assess the extent to which current internationalization activities fit the conceptual umbrella; critically examine the causes that are leading to some questioning and even criticism of the process, and find ways to address these concerns. The main output of the work of this group, was the third IAU statement: *Affirming Academic Values in Internationalization of Higher Education: A Call for Action*

- **Regular Global Surveys** – prior to the present survey three others have been undertaken and published, starting in 2003.

- **Internationalization Strategies Advisory Service (ISAS)** – available to all IAU member institutions to assist them in developing, reassessing and/or revitalizing their internationalization strategy and related activities. ISAS works with institutional leadership and staff to ‘accompany’ them in their reflection, and efforts to enhance their internationalization policy and actions.

- **Webpages on internationalization.** An open resource, the website includes definitions of key concepts, all IAU statements on internationalization; a summary of relevant declarations and codes of conduct, links to internationalization initiatives taking place across the world, and a bibliography of some key articles and research papers. www.iau-aiu.net

Executive Summary and Highlights of Findings

Introduction and Context

This fourth edition of the IAU Global Survey on internationalization of higher education was undertaken with support from, and in collaboration with four partner organizations: the British Council, the European Commission, NAFSA: Association of International Educators, and the European Association of International Education (EAIE). IAU is grateful to them and to all others who contributed to the design of the questionnaire, its translation into Spanish, its wide dissemination to institutions worldwide. Most particular words of thanks and appreciation go to those in the higher education institutions who provided invaluable data by responding to the survey.

Internationalization is an integral part of a continuous process of change in higher education; increasingly it is becoming a central motor of change. Its importance has grown along with the more general developments of globalization, offering new opportunities but also posing new challenges. Discussions among policy makers, higher education leaders and stakeholders and ongoing research have shown that the expansion of internationalization has brought with it questions about its meaning, its impact on learning as well as on the nature of relations among institutions. A very healthy debate about the assumptions and underlying values of internationalization has been taking place over the past two or three years, with the International Association of Universities (IAU) very much engaged in it. The initiative to 're-think' internationalization, coordinated by IAU, and involving a large international group of experts resulted in the adoption in 2012 of a policy statement entitled *Affirming Academic Values in Internationalization of Higher Education: A Call for Action*. Along with findings from previous IAU Global Surveys, the statement and this survey have given rise to a better appreciation of the benefits as well as the possible negative consequences of internationalization. Most importantly, these activities have stimulated a worldwide discussion about the measures that might be needed to avoid potential negative impacts of the processes that take place within the framework of internationalization.

The purpose of the IAU Global Surveys is to provide data and analysis of developments in internationalization of higher education. Alongside its data collection on the importance, the activities and priorities of this process, this 4th edition of the IAU Global Survey adds an important focus on values and principles, as well as the potential benefits and risks of current trends in internationalization of higher education for both institutions and society.

Methodology and Respondents

The IAU 4th Global Survey took place approximately four years after the previous one. The report is based on responses from 1,336 institutions of higher education located in 131

countries in every world region. The number of responses was nearly double that of the previous survey. The dominant institutional profile of responding HEIs is public, focused on both teaching and research, offering programs at all degree levels and relatively small in size in terms of student enrolment (under 5,000 students). The table below presents the geographic distribution of respondents:

TABLE 1: GEOGRAPHIC DISTRIBUTION OF RESPONDENTS

Region	% of respondent	Number of HEIs
Africa	9%	114
Asia and Pacific	12%	164
Europe	45%	604
Latin America & the Caribbean ²	11%	141
Middle East	4%	60
North America	19%	253

Electronic invitations and to with a link to the questionnaire were sent to the heads of higher education institutions, and when available, also to heads of international offices of those institutions. In total, 6,879 institutions worldwide were contacted. They were instructed to provide data for the start of the 2012 academic year, and the survey was conducted between May and September, 2013. The questionnaires and a glossary of terms and definitions were made available in English, French and Spanish.

In all results, the n=1,336 unless otherwise indicated. Results are presented at the aggregate/global level and where there were notable findings, also at the regional level. To the extent possible, given differences in the questions in the successive surveys, changes over time were also documented.

Highlights of Findings

The results of the 4th Global Survey bring some good news starting with an almost 20% rate of response, itself a measure of success. The findings demonstrate that internationalization remains, or indeed grows in importance for higher education institutions. It is being driven, in large measure, by the most senior levels of leadership of the institutions. The majority of the institutions already have or are developing policies to implement the process and have the key elements of supportive infrastructure in place to move forward and monitor progress.

At the aggregate level, results show that internationalization has fairly clear priorities with respect to specific activities, most often targeting student learning and student mobility.

Student knowledge and appreciation of international issues is also the most significant expected benefit, though institutions also perceive risks, at both institutional and societal levels. The report also indicates that in terms of geographic priorities, an intra-regional focus remains strong, with interest in Europe continuing to be a high priority for internationalization in most other regions.

Responses to specific questions with regard to the values and principles that are referenced in institutional internationalization policies, as well as the results concerned with perceived institutional and societal risks demonstrate that higher education institutions place emphasis on academic goals in their internationalization strategies. They express concern about equal access to international opportunities for all students and about the commodification and commercialization of education. They are also preoccupied that more competition among higher education institutions will arise as a result of internationalization.

There is consensus with regard to limited funding being a major obstacle in internationalization, but on the more positive side, when asked about changes to the allocation of budgets over time, for the most part, the results provide evidence that support has remained steady or has in fact increased for some internationalization activities. Decreases in budgets for such activities are reported by a relatively small percentage of respondents.

As in the past, significant regional differences remain in several areas, including for example, with regard to the expected benefits of internationalization where the top ranked reply in one or two regions – student appreciation of global issues or knowledge about international topics, is not even among the top three benefits in other regions. In other cases of regional comparisons, there can be a general consensus around the top ranked response – for example with regard to the risk at the institutional level which concerns access for all to opportunities, yet beyond this top ranked response, there are rather clear regional differences. In some regions, risks concern the inability to assess quality of foreign programs, elsewhere it is the concern with too much competition among HEIs and still in other regions, there is a concern that too much emphasis is placed on internationalization. Thus the regional results remain a critical aspect of this analysis and often tell a much more nuanced story about how internationalization is evolving but also what aspects need to be considered when building inter-regional partnerships and exchanges.

Finally, there appear relatively few major changes over time when comparisons are drawn between this and previous IAU surveys. For example, there is a fairly significant consistency with regard to the perceptions of the most important risks at the aggregate level. When both societal and institutional risks in the 4th Global Survey are compared with the perceived risks in the previous two surveys, practically the same issues are identified: commodification/commercialisation, brain drain, difficulty in assessing quality of foreign programs. At the same time, there are some new issues being reported such as the risk of growing gaps in quality and/or prestige among institutions in a given country. As well, some areas of activity which were growing in prominence in the past – dual/double and joint degrees, for example, may be losing momentum in institutions according to results in this survey.

On the whole, as the report's findings show, in several areas, institutional strategies show a pretty strong internal coherence. Several examples can be underlined, including the

parallels between priority internationalization activities, expected benefits and budget allocations trends in recent years. For the most part, these are going in similar directions and thus, institutions appear not only to elaborate policies, they are also aligning their actions accordingly.

The results of this survey, as of those in the past, also raise new or persistent questions about, *inter alia*, the exact nature of the role of faculty in internationalization, about the extent to which curricular change is seen as a key way to prepare students for life and work in and international environment, rather than relying primarily on mobility opportunities, about the place of online and distance education in internationalization. More studies and research, building on the findings are needed to find these and other answers.

Internationalization policy/strategy and infrastructural supports

Aggregate results

- 53% of the respondents have an institutional policy/strategy and 22% report that one is in preparation; 16% indicate that internationalization forms part of the overall institutional strategy.
- A comparison over time shows a consistent drop in the number of institutions reporting having a policy; 53% reported such a policy in the 4th Global Survey, 67% did so in the 3rd Global Survey; and 82% did in the 2nd Global Survey. This drop needs to be considered with caution. The fact that 22% of the respondents report that a policy is being prepared, added to those reporting that they already have such a policy (totaling 75% of the HEIs) may be a more accurate comparative figure, thus decreasing the difference in findings in previous surveys considerably. The drop may perhaps also be explained by the fact that the policy is now an integral part of the overall institutional policy in more institutions.
- 61% of the institutions report having a dedicated budget for internationalization, compared to 73% reporting one in the previous survey.
- 66% of the respondents report having explicit targets and benchmarks to assess their internationalization policy implementation.
- The most frequently assessed areas of internationalization are international student enrollment, outbound student mobility and partnerships.

Regional results

Wide variations exist among regions with respect to internationalization policy/strategy, with the highest proportion of respondents with such a policy being in Europe and Asia (56% - 61%), and the other regions ranging from 40% to 47%. About 15% - 20% of respondents in all regions indicate that internationalization forms part of the overall policy, with the smallest proportion of regional respondents reporting this in the Middle East (13%).

Importance of internationalization and expected benefits

Aggregate results

- 69% of the respondents report that internationalization is of high importance for the leadership of their institution.
- In terms of change in the past three years, 27% report that over this period, internationalization has remained very important; 30% report that it has substantially increased in importance, and for another 31% it has increased in importance.
- For 32% of the respondents, the top ranked expected benefit is students' increased international awareness and engagement with global issues. This is followed by improved quality of teaching and learning. Revenue generation is the lowest ranked benefit overall.
- When compared over time, expected benefits at the aggregate level have generally remained similar, focusing on student awareness, quality of teaching and learning, and strengthening research.

Regional Results

Regional differences are visible. Students' increased international awareness is top-ranked in Asia and Pacific and North America. In Europe and the Middle East, the top ranked benefit is improved quality of teaching and learning. For African respondents, the top ranked benefit is strengthened knowledge production capacity, and for Latin America and the Caribbean institutions, the highest ranked benefit is increased networking of faculty and researchers.

Internal and external drivers of internationalization

Aggregate results

- 46% of the respondents see the head of the institution as the most important internal driver of internationalization and 28% see the international office or the person responsible for internationalization in that role. Faculty members are ranked in third place.
- 32% of the respondents identify government policy (national, state/province, municipal) as their top ranked external driver, followed by business and industry (18%). When the results of the three-ranked external drivers are considered together, national and international rankings are the third most important external driver.

Regional results

Respondents in Africa and the Middle East cited national and international rankings as the most significant driver of internationalization, not government policy –which is the top driver in the aggregate results. Rankings are reported among the top three external drivers by respondents in all regions but North America.

African and North American respondents also identify demand from foreign HEIs among top three external drivers. Only European respondents place regional policies as an important external driver (ranking this as the second most important driver).

Risks of internationalization to institutions and to society

Aggregate results

- Respondents perceive, as the most significant risk of internationalization for institutions, that international opportunities will be available only to students with financial resources; 31% of the respondents cited this as the most significant risk. This top-ranked risk is followed by the difficulty of local regulation of the quality of foreign programs (13% respondents selected this as their top choice), and by excessive competition among HEIs.
- The most significant potential risk of internationalization for society is commodification of education, ranked first by 19% of the respondents. The unequal sharing of benefits of internationalization among partners was ranked at the top by 18%. When all three top-ranked responses are brought together, in third place is growing gaps between HEIs within the country.

Regional results

Respondents in all regions except Europe rank the risk that international opportunities will be available only to students with financial resources as the most important.

Regional variations emerge below the top-ranked choice. Respondents in Africa and the Middle East consider brain drain the second most important risk for institutions. For respondents in Asia and Pacific, two institutional risks are ranked in second place: excessive competition among HEIs, and over-emphasis on internationalization at the expense of other priorities. Only North American respondents identify too much focus on recruitment of international fee-paying undergraduates as a risk, ranking it in second place. In Latin America and the Caribbean as well as in Asia and Pacific, respondents ranked the pursuit of international partnerships only for reasons of prestige as the third most important risk of internationalization to the institutions.

Societal risks of internationalization are also perceived differently in various regions. Commodification and commercialization of education is the top ranked risk in all regions but Africa and Latin America and the Caribbean, where it is in third place and in the Middle East where it is not ranked among the top three at all. Both Africa and Latin America and the Caribbean place the risk of unequal sharing of benefits of internationalization at top of their ranked list. The respondents in the Middle East identify the risk of brain drain as the most important potential risks of internationalization to society. For African respondents, the dominance of a 'western' epistemological approach is seen as the second most important societal risks, while in the Middle East, respondents view the loss of cultural identity as the second most important societal risk. In Asia and Pacific, the third most important risk to society is the increase in foreign 'degree mills' and/or low quality providers.

Internal and external obstacles

Aggregate results

- The respondents identify insufficient financial resources as the most significant internal obstacle, with 49% ranking this first.
- The second highest ranked internal obstacle, but ranked so by far fewer institutions, is the limited experience and expertise of faculty and staff.
- 38% of the respondents place limited public funding for internationalization as their top-ranked external obstacle, representing a strong consensus in comparison to all other choices.
- When the respondents' three top-ranked external obstacles are examined together, the language barrier becomes more significant, ranking second overall.

Regional results

Respondents in all regions agree that lack of funding is the most significant internal obstacle to advancing internationalization. Beyond this responses diverge. Insufficient exposure to international opportunities is ranked second by respondents in Africa, Asia and Pacific and Middle East. The limited experience and expertise of faculty members and staff is ranked second by respondents in Europe and Latin America and the Caribbean, while North American respondents put the too rigorous and inflexible curricula in second place.

There is also a high level of agreement among respondents in all regions that the most significant external obstacle is limited public funding to support internationalization. Language barrier is ranked second among external obstacles by respondents in Latin America and the Caribbean and in Europe, while recognition difficulties for qualifications and programs is ranked second by respondents in Africa and Asia and Pacific. Visa restrictions imposed on international students, researchers and academics is the second most important external obstacle in the Middle East, North America and Africa. Only in Africa is the fact that internationalization is not a priority in national policy ranked as an important external obstacle; African respondents ranked it third.

Geographic priorities in internationalization

Aggregate results

- 60% of the respondents report having identified geographic priorities for internationalization.
- Results show that Europe is the overall geographic priority region for the respondents that report having such priorities, followed by Asia and Pacific and North America. As a region, Africa is selected as a priority region by the smallest number of respondents.

Regional results

European respondents identify geographic priorities most frequently (66%), while respondents from Africa do so least often (44%). Of those respondents who reported that

their institutions had established geographic priorities, respondents from Africa, Asia and Pacific and Europe identify their own region as the top priority; North American respondents identified Asia and Pacific as theirs. Respondents in Latin America and the Caribbean placed Europe and North America on an equal footing as their top geographic priorities.

European respondents identified Asia and Pacific as their second most important geographic priority; for North America the second highest priority region is Latin America and the Caribbean. Neither the Middle East nor Africa is cited by respondents in any other region as among their top three priorities.

Values and principles in internationalization policy

Aggregate results

- Of the values and principles that were identified as options that may be referenced in institutional internationalization policies, the principle that academic goals were central to the international efforts was selected by 59% of the respondents.
- 51% of the respondents indicated that their policy referred to sharing of benefits, respect and fairness as the basis for international partnerships.
- Almost an identical proportion of respondents (50%) report that a reference to the value of equitable access to internationalization opportunities was part of their policy.
- 25% of the respondents report that the principle of shared decision-making, is referenced in their policy, making it the least often cited option.

Regional results

Respondents in all but one region, the Middle East, report that their institutional policy refers to academic goals as central to internationalization efforts. In the Middle East, it is the values or principles of scientific integrity and research ethics that are mentioned most frequently in the institutional policies. Respondents in only one other region, Africa, select the issue of scientific integrity among the top three values or principles. Respondents in Asia and Pacific, the Middle East, and North America cite local and global social responsibility as their second most frequently referenced value, while Latin American and Caribbean respondents cite the values concerned with shared benefits, respect and fairness as the basis for international partnerships.

Priority internationalization activities

Aggregate results

- The top-ranked internationalization activities are outgoing mobility opportunities for students (29%), international research collaboration (24%) and strengthening international content of curriculum (14%) as a distant third.

Regional results

Respondents in Europe, Latin America and the Caribbean and North America rank outgoing student mobility opportunities as the most important internationalization activity. For respondents in Africa, Asia and Pacific and the Middle East, international research collaboration was cited as the most important internationalization activity. Outgoing faculty or staff mobility is the second highest ranked activity in Africa, Asia and Pacific and Middle East; in Latin America and the Caribbean it is ranked third.

North American respondents are the only ones to rank recruiting fee paying international undergraduates as one of the top three internationalization activities; it is ranked second. Respondents from the Middle East are alone in ranking international marketing and promotion among the top three; it is ranked third. Similarly, African respondents are the only ones to rank international development and capacity building among the top three activities; they rank it third.

Funding of internationalization

Aggregate results

- 53% of the respondents report that the general institutional budget is the largest single source of internationalization funding, while 24% cite external public funds as the largest source.
- A majority of respondents report either stable or increased funding for internationalization.
- A significant proportion of respondents (between 39 and 47% depending on the activity) cited increased budgets for internationalization over the past three years in the following areas: international research cooperation, outgoing mobility for staff and outgoing mobility for students.
- No more than 10% of the respondents reported decreased budgets in the past three years for any internationalization activities.

Regional results

Increases in funding for the greatest number of internationalization activities are reported by respondents in the Middle East, followed by African respondents. Respondents from both regions report funding increases in activities such as marketing and promotion of their institutions internationally and international development and capacity building projects. Respondents in the Middle East are the only ones that report increased funding for strengthening the international content of curriculum and North American respondents are the only ones reporting increased funding for the recruitment of fee-paying undergraduate students.

International student enrollment

Aggregate results

- Just over 50% of the respondents report that international degree-seeking undergraduate students represent less than 5% of their total enrollment. Results show that at the post graduate levels, respondents are less likely to have more than 5% of their post-graduate enrollment comprised of international degree seeking students.
- Just over a quarter of the respondents report that international degree-seeking students represent between 6 and 15% of their total enrolment at the undergraduate level; again fewer respondents report this share at post-graduate levels.
- 64% of the respondents report that shorter-term, credit earning international students represent up to 5% of their overall student enrollment at the undergraduate level. 54% report this share for Master's level enrollment and 50% at the Doctoral level.

Outgoing student mobility

Aggregate results

- 15% of the respondents report that their institutions do not offer undergraduate students short/medium (3-12 months) out-going mobility opportunities. Similarly, 28% of institutions do not offer such opportunities at the Master's level and 33% do not offer them at the Doctoral level.
- 63% of the respondents report that up to 5% of their students at the undergraduate level participate in short/medium term mobility opportunities, 54% report the same for Master's level students, as do 51% at the Doctoral level.
- Short-term (less than 3 months) outgoing mobility opportunities are not available at 26% of institutions for any students at the undergraduate level.
- 59% of the respondents report that up to 5% of their enrolled undergraduates can take advantage of such short-term international mobility opportunities.

Recruitment of international students

Aggregate results

- Respondents are almost equally distributed between those that have specific targets for international student recruitment and those that do not
- Among those that have such a target, nearly a quarter set it at 5% of their total enrollment; another quarter set this target at between 6 and 15% of their enrollment.
- Asia and Pacific is the geographic region most often prioritized for international student recruitment, followed by Europe.

Regional results

Institutions in Asia and Pacific, followed by those in North America, are most likely to have

quantitative international student recruitment targets. Latin American and Caribbean institutions are the least likely to set such targets. Intra-regional focus is prioritized in recruitment strategies of institutions in Africa, Asia and Pacific, and Latin America and the Caribbean.

Faculty members' international experience and mobility

- 40% of the respondents report that up to 10% of their faculty members have at least one year of experience working abroad.
- 15% of the respondents report that between 11 and 20% of their faculty members have had at least a year-long international work experience.
- 54% of the respondents indicate that in the previous year, up to 10% of their faculty members taught or undertook research for a short-term (least 3 months) period abroad.
- 14% of the respondents were unable to respond to each of the two questions concerning faculty members' international experience and mobility.

Internationalization at home

Aggregate results

- Requiring a foreign language was most frequently ranked first among internationalization activities that respondents reported undertaking as part of the formal curriculum; 26% cited it as their top-ranked activity.
- When the top three-ranked activities are combined, the provision of student scholarships for outgoing mobility opportunities is the highest ranked. Programs or courses with an international theme are also ranked high.
- Integrating the contributions of international students into the learning experience is ranked second last in importance.
- The top ranked extra-curricular activity is events that provide an intercultural or international experience; followed by mentor or 'buddy's schemes linking international and home students.

Regional results

Regional results showed significant variations with regard to internationalization activities as part of the formal curriculum. For respondents in Africa and in Asia and Pacific, the top ranked activity is professional development of faculty to enhance their ability to integrate an international dimension into their teaching and in Latin America and the Caribbean the top ranked activity is foreign language learning. In Europe, respondents ranked first the offer of scholarships for outgoing mobility of students and North American respondents cited offering programs or courses with an international theme as the most important internationalization activity in the formal curriculum.

Learning outcomes

Aggregate results

- A majority of respondents indicate that they have (35%) or are developing (22%) institution-wide learning outcomes related to international/global competencies.
- In general, discipline-specific learning outcomes related to international competencies are more frequent in professional programs.

Regional results

The region where most respondents confirm having identified specific, internationally focused learning outcomes is North America (46%), followed by Asia and Pacific (45%). Respondents in Europe (36%) and in the Middle East (35%) were the least likely to confirm having such learning outcomes. It is also in these two regions, as well as in Africa, that the highest number of respondents indicates that such learning outcomes are in development.

Joint and dual/double degree programs

Aggregate results

- At all degree levels, there is a higher percentage of respondents whose institutions offer dual/double degree programs with foreign partners than joint degree programs.
- Over the past three years, the largest growth of both types of programs has taken place in professional areas, such as medicine, engineering, business or education, Off Shore provision, distance, on-line and e-learning
- 50% of the respondents do offer academic courses abroad and these courses are offered almost equally at the undergraduate and Master's level.
- The majority of respondents report not being involved in other type of off-shore provision. This is the case for all other categories of activity (offering full academic programs abroad, branch campuses or joint ventures and franchises).
- Of those that offer off-shore courses, for 52% of them the majority of the students enrolled in these courses are local students from the host country; for 25% of these respondents, they are from the country of the institution offering the course and in 19% of the respondents, the information about where students come from is unknown.
- Just over 50% of the respondents confirm offering distance, online or e-learning course. Of those that do, the offer is available almost equally at the undergraduate/1st cycle level as at the MA/ 2nd cycle level.
- The geographic location of the majority of international students enrolled in distance, online, e-learning is highly varied but the largest source region is Asia and Pacific followed by Europe.

Language study

The fastest growing foreign language courses in terms of student enrolment are English, Spanish and Chinese.

Conclusion

The IAU 4th Global Survey report, *Internationalization of Higher Education: Growing expectations, Fundamental values*, offers a vast amount of data and information. Some of it provides substantiation to support anecdotal evidence and observable trends. In some cases, the report offers new information and expands the knowledge base about the process, both at the global level, but more importantly at the regional levels. It allows, in most cases, to see how various regions perceive the benefits of the process, what specific challenges institutions in certain regions face and on which activities they place most emphasis.

By gathering data on the articulation of certain values and principles in institutional policies, and asking about the perception of institutional and societal risks of internationalization, the report serves to raise awareness of key issues and to provoke discussion.

As was the case for previous IAU surveys, the results should stimulate new thinking about internationalization and point to many new areas for further research. Do we see increased congruence or divergence among respondents from different regions? In which areas is there a trend towards the first and in what areas the second? How can research get beyond the 'social desirability bias' in these studies? Although the full report provides many detailed findings, and analysis, it still cannot provide definitive answers or demonstrate causal relationships. The report does, however, add to the overall stock of knowledge about internationalization processes in higher education institutions across the globe, raises critical questions about similarities and differences in trends, and can serve as a useful resource to policy makers, higher education leaders and other stakeholders as they develop new strategies

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IAU 4th Global Survey

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