# THE EAIE
# BAROMETER

## INTERNATIONALISATION IN EUROPE

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# EXECUTIVE SUMMARY

## 1.1 INTRODUCTION

### *The internationalisation of higher education*

The growing interdependence of nations has significantly transformed higher education policy. As a result, internationalisation of higher education has become one of the key policy objectives of many states. Definitions and rationales of internationalisation have evolved significantly as higher education institutions adapt their structures, staffing and curricula to meet the needs of the modern economy. Yet, despite the imperative for higher education to internationalise, the reasons for and challenges of internationalisation differ according to national and institutional contexts.

### *Globalisation and internationalisation*

Globalisation is a key part of the environment in which higher education institutions operate and to which they have had to adapt. Globalisation affects each country differently. By now, it is abundantly clear that while globalisation may be defined, it does not assume the same meaning everywhere. For higher education institutions, globalisation typically refers to "the broad economic, technological, and scientific trends that directly affect higher education and are largely inevitable in the contemporary world" (Altbach, 2006, p. 123). Inevitable trends must be addressed, and higher education institutions have largely responded in a similar way: internationalisation.

Although it may be seen as a threat to national culture and autonomy, globalisation can offer new opportunities for study and research across national borders. Certainly, internationalisation has made it clear that transparency and accountability are crucial for student and labour mobility. Internationally recognisable benchmarks and standards are needed to adequately assess foreign qualifications. To this end, there is an ongoing need for data on the internationalisation of higher education, to which *The EAIE Barometer: Internationalisation in Europe* makes a clear contribution.

### *Defining internationalisation*

The definition of internationalisation has evolved since the 1980s, when the focus was on social and political rationales. In the late 1980s, internationalisation was commonly defined at the institutional level and in terms of a set of activities. Arum and van de Water (1992, p. 202) proposed that internationalisation refers to "the multiple activities, programs and services that fall within international studies, international educational exchange and technical cooperation." By the mid-1990s Knight introduced an organisational approach and defined it as the "process of integrating an international and intercultural dimension into the teaching, research and service functions of the institution" (Knight, 1994, p. 7). Yet, definitions at the institutional level continued to evolve. Given the number of different interpretations, de Wit (2002, p. 114) concluded that: "It is not helpful for internationalization to become a catchall phrase for everything and anything international …This is why the use of a working definition in combination with a conceptual framework for internationalization of higher education is relevant."

Over time, rationales, providers, stakeholders and manifestations of internationalisation have changed. Knight (2004) developed a new definition that applies to many different countries, cultures and education systems and remains appropriate in a broad range of contexts and for comparative purposes across countries and regions. Knight (2003 p. 2) proposes the following working definition: "Internationalization at the national/sector/institutional levels is defined as the process of integrating an international, intercultural or global dimension into the purpose, functions or delivery of post-secondary education." For the past decade this has been the accepted definition used by many scholars and practitioners in the field.

## Rationales for internationalisation

Rationales for internationalisation are different for different countries. For the United States and the United Kingdom, international higher education is largely a commercial venture, while countries across Western Europe use it as a means of "soft power" diplomacy (Altbach, Reisberg & Rumbley, 2009). In Central and Eastern Europe, international mobility primarily means brain drain, while internationalisation of the curriculum is indicated by the prominence of the English language in scientific publications, often at the expense of local scholarship (Glass, 2014).

In the 1990s, Knight and de Wit (1997) presented four groups of rationales driving internationalisation: social/cultural, political, academic and economic. Knight (2004) later added a fifth group, competition, to reflect the more recent importance of branding and developing an international reputation, particularly via rankings. Knight also recognises the increased blurring of groups, for instance between political and economic rationales, and describes the importance of distinguishing between national and institutional rationales. In effect, rationales driving internationalisation vary from institution to institution and often overlap. Competing or even opposing rationales make internationalisation complex; therefore, it is important for higher education institutions to be clear in their motivations to internationalise "as policies, programmes, strategies and outcomes are all linked and guided by explicit and even implicit rationales" (Knight, 2004, p. 28). The EAIE Barometer addresses, among other things, the rationales for European higher education institutions to internationalise.

## Internationalisation at home and abroad

The most overt manifestation of internationalisation in higher education is mobility of students and staff. In Europe, the ERASMUS programme has successfully stimulated and supported temporary mobility of students, and mobility has been high on the Bologna Process' agenda since its inception. High visibility is also given to international partnerships and projects, research initiatives, cross-border delivery and branch campuses or franchises using face-to-face or distance learning platforms. These types of internationalisation do not necessarily impact the national nature of subject content and style of delivery or assessment, as they have evolved and are upheld within public and private higher education institutions.

Multiple studies link the experiential learning of study abroad with the accumulation of highly valued "soft skills". Furthermore, higher education institutions that connect international mobility with skill development can better explore the potential an internationalised curriculum at home can have on all students, not merely the mobile minority (Jones, 2014). Wächter (2003) describes "internationalisation at home" as bringing attention to those aspects of internationalisation that would happen at a home institution: the intercultural and international dimension in the teaching–learning process, extracurricular activities and relationships with local cultures and ethnic groups. A key product of internationalisation at home is an internationalised curriculum, which affects all students, faculty and everyone involved in developing study programmes and the environments that shape students. Given that the modern economy needs graduates with international awareness, intercultural competences and an understanding of interdependence, higher education institutions should respond with internationalised curricula – while international mobility components would remain important but optional.

## Assessing internationalisation

Assessing the impact of internationalisation clarifies for stakeholders, funders and policy makers how the process and products of internationalisation contribute to institutional mission, objectives and quality. Purposeful assessment equally informs policy development and quality improvements in internationalisation efforts. Hence, the importance of institutional strategy for internationalisation cannot be overemphasised. De Wit (2010) identifies a need for the quality assessment of internationalisation strategies in higher education, for which several instruments are already available. Such instruments are intended mainly for the institutional level and address the state of the art or the process for improvement, or both.

Furthermore, systematic information on types, trends, needs and approaches contributes to general knowledge on trends in internationalisation. Data on how cross-border internationalisation affects the home institution and on internationalisation at home take effort to collect and compare. Currently, very little is known about staff involved with internationalisation, specifically their skill levels and training needs. In its communication on *European Higher Education in the World*, the European Commission identifies as one of its key priorities on internationalisation to "capitalise on the international experiences and competences of the staff of higher education institutions, aiming to develop international curricula, for the benefit of both non-mobile and mobile learners" (EC, 2013, p. 12). The EAIE Barometer 2014 addresses some of the main gaps in knowledge about internationalisation staff working primarily at higher education institutions.

### *The EAIE Barometer 2014*

The aim of the EAIE Barometer 2014 is to provide comprehensive research that effectively maps the state of internationalisation in the European Higher Education Area (EHEA) from the point of view of the actors directly involved in internationalisation. Responding to this specific need, the European Association for International Education (EAIE), in cooperation with research and consultancy company Ecorys, initiated the EAIE Barometer 2014, which particularly focuses on:

- The current state of affairs regarding internationalisation in EHEA countries;
- Key developments and challenges in internationalisation;
- Skills requirements/specific needs of staff involved in international education.

The outcomes of the EAIE Barometer 2014 are intended to inform the community of actors in the field on the current state of developments in internationalisation in the EHEA and on the nature of the necessary support to stimulate practices toward enhanced professionalisation.

### *Methodology*

An advisory group composed of four independent higher education specialists as well as EAIE and Ecorys representatives developed the first draft of the survey. Subsequently, the draft was distributed to a sample group of 22 experts from 15 countries. Feedback from the sample group was incorporated into the final survey to render it more relevant and comprehensible for all participants. The online survey was distributed among EAIE members and the association's network through direct email and snowball sampling via social media in spring 2014. The sampling method resulted in a net response of 2411 respondents from 33 of the 47 countries that comprise the EHEA.[1]

The majority of the respondents (2093) work at higher education institutions (HEI): academic universities, universities of applied sciences, polytechnics, colleges of higher education, etc. HEI respondents represent about 1500 higher education institutions across the EHEA. Non-HEI respondents (318) work in the framework of international higher education as policy makers or in policy implementation at, for example, national ministries of education, national accreditation bodies, national higher education agencies, consultancy companies specialised in higher education, etc. About a third of the respondents included in the EAIE Barometer 2014 specify their EAIE membership.

The main focus in the analysis is on the responses provided by HEI respondents, which account for 87% of all responses; non-HEI respondents make up the remaining 13% of the responses and provide an external source of consideration against the background provided by the self-assessment of the HEI respondents with regard to trends and developments identified within higher education institutions.

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1  In total 2598 respondents filled in the survey but only participants from countries that reached the minimum threshold of responses are included in the study.

## 1.2 PROFILE OF THE RESPONDENTS

### *Nationality, gender, age and educational background*

Respondents originate from a wide variety of countries across the EHEA (Figure 1). About two-thirds of the HEI respondents are women (70%). Among non-HEI respondents, the percentage of women is slightly lower (61%). All respondents are distributed fairly proportionally across age groups. The majority of respondents have a sound academic background: more than half hold a Master's degree or equivalent, and almost a third hold a PhD degree or equivalent.
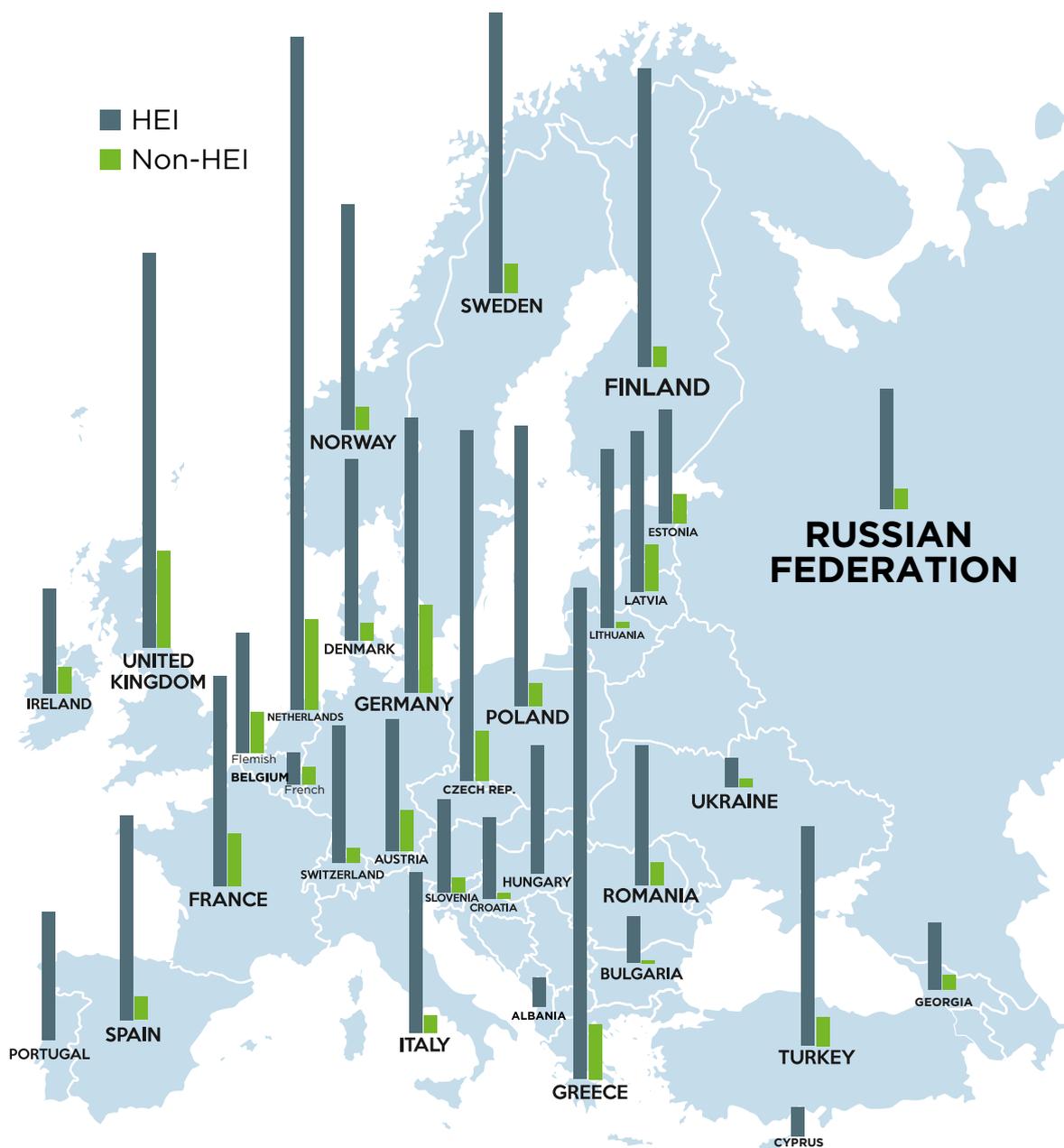


**Figure 1**

**Number of HEI (N=2093) and non-HEI respondents (N=318), per country**

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Albania | 10 | 0 | France | 72 | 18 | Poland | 96 | 8 |
| Austria | 45 | 14 | Georgia | 23 | 5 | Portugal | 44 | 0 |
| Belgium (Flemish) | 41 | 14 | Germany | 94 | 30 | Romania | 48 | 8 |
| Belgium (French) | 11 | 6 | Greece | 168 | 19 | Russian Federation | 41 | 7 |
| Bulgaria | 16 | 1 | Hungary | 44 | 0 | Slovenia | 32 | 5 |
| Croatia | 28 | 2 | Ireland | 36 | 9 | Spain | 70 | 8 |
| Cyprus | 10 | 0 | Italy | 55 | 6 | Sweden | 96 | 10 |
| Czech Republic | 120 | 17 | Latvia | 55 | 16 | Switzerland | 47 | 5 |
| Denmark | 62 | 6 | Lithuania | 61 | 2 | Turkey | 75 | 10 |
| Estonia | 39 | 10 | Netherlands | 230 | 31 | Ukraine | 10 | 3 |
| Finland | 102 | 7 | Norway | 77 | 8 | United Kingdom | 135 | 33 |

*Professional working environment*

Most HEI respondents have an administrative or management function. Non-HEI respondents most often hold a management position. A majority of the respondents have considerable working experience in international higher education. Most of the HEI respondents work on international partnerships (53%); the other areas of responsibilities include management of international offices (35%), international funding programmes (29%), and internationalisation policies (22%). The majority of the HEI respondents (66%) work at the central level, while most others (29%) work at the faculty or department level.

Most HEI respondents work at a higher education institution providing for all three degree cycles: Bachelor's, Master's and PhD. The majority of HEI respondents (60%) work at publicly funded higher education institutions, whereas only a small minority (14%) work at privately funded higher education institutions. In the majority of HEI respondents' institutions, the number of international students is small: 53% of HEI respondents work at institutions with fewer than 500 international students, including those enrolled in PhD tracks. Only a small minority of HEI respondents (14%) work at institutions with more than 2000 international students.

## 1.3 REASONS FOR INTERNATIONALISATION

The results of the EAIE Barometer 2014 demonstrate that the majority of HEI respondents (56%) view internationalisation as an instrument to improve the overall quality of education at their institutions (Figure 2). Hence, internationalisation is regarded as an inextricable element of the educational process. Similarly, respondents claim that the aim of international higher education is to prepare students for a global world (45%). Respondents' answers also feature the objective to attract more international students (37%) and the goal to improve the international reputation and the ranking position of the institution (35%). In fact, the results of the EAIE Barometer 2014 suggest that higher education institutions often have a combination of reasons to focus on internationalisation.

**Figure 2**

**Most important reasons to internationalise (multiple answers possible) (N=1501)**
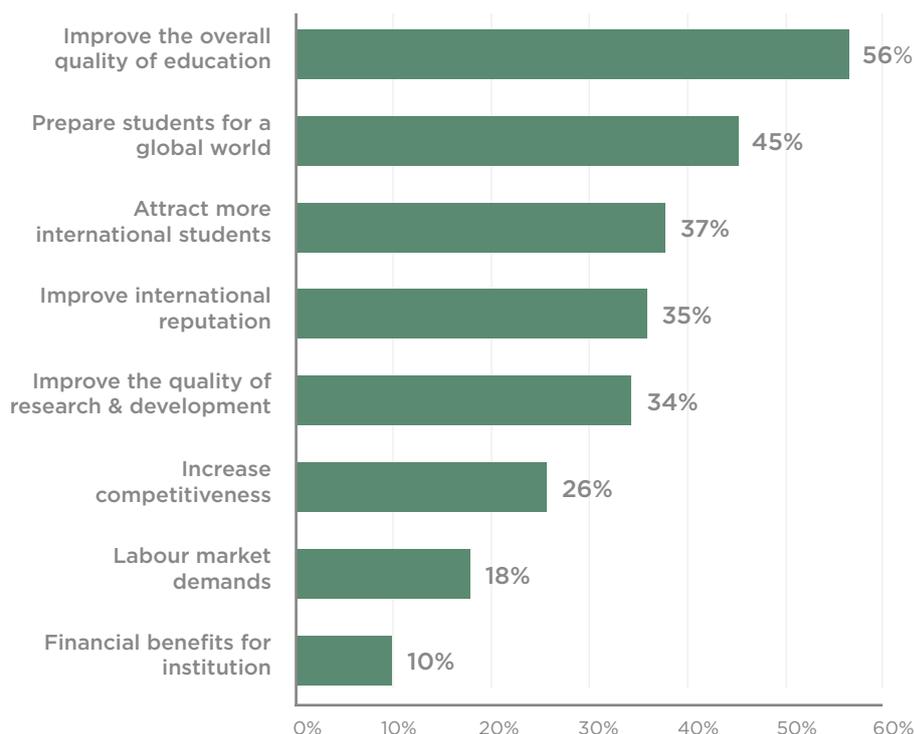
## Cross-national differences

The most recurrent reasons for internationalisation consistently form a cross-national unanimity with regard to the main focus of internationalisation. Slight cross-national variations emerge from the data, mainly resulting from specific national policies and contexts, as well as from the level of maturity that institutions in a specific country may have reached in terms of internationalisation.

## Differences by source of funding

The key reasons for higher education institutions to focus on internationalisation also seem to differ depending on funding source. The general assumption is that privately financed institutions are more focused on the financial benefits associated with internationalisation. This seems, indeed, to be the case, although to a limited extent. For privately funded institutions, motives of an extrinsic nature, such as attracting international students (46%) and financial benefits (16%), frequently feature as the most important reasons for internationalisation. For publicly funded institutions, these two reasons are of slightly less interest, featuring in 36% and 9% of responses, respectively. Similarly, labour market demand constitutes a concern for 28% of the privately funded institutions and for only 18% of the publicly funded ones. Interestingly, in contrast with privately funded institutions, publicly funded institutions attach greater value to the improvement of the quality of research and development by means of internationalisation.

## Differences by level of internationalisation

With regard to higher education institutions' stage of development in internationalisation, slight variations come to the fore in terms of institutions' reasons for focusing on internationalisation. Here the stages of higher education institutions' internationalisation are demarcated as *leading, average* and *lagging behind*.[2] Institutions regarded as *leading* are commonly perceived as having a stronger focus on improving the overall quality of education (57%), preparing students for a global world (52%), improving quality in research and development (37%) and catering to their international reputation and position in international rankings (41%). Usually, *leading* institutions are perceived to focus the least on the financial benefits of internationalisation. Notably, institutions perceived as *lagging* behind in internationalisation are indicated to have a stronger focus on the financial benefits of internationalisation (15%).

## 1.4 INTERNATIONALISATION STRATEGIES AND INTERNAL ORGANISATION

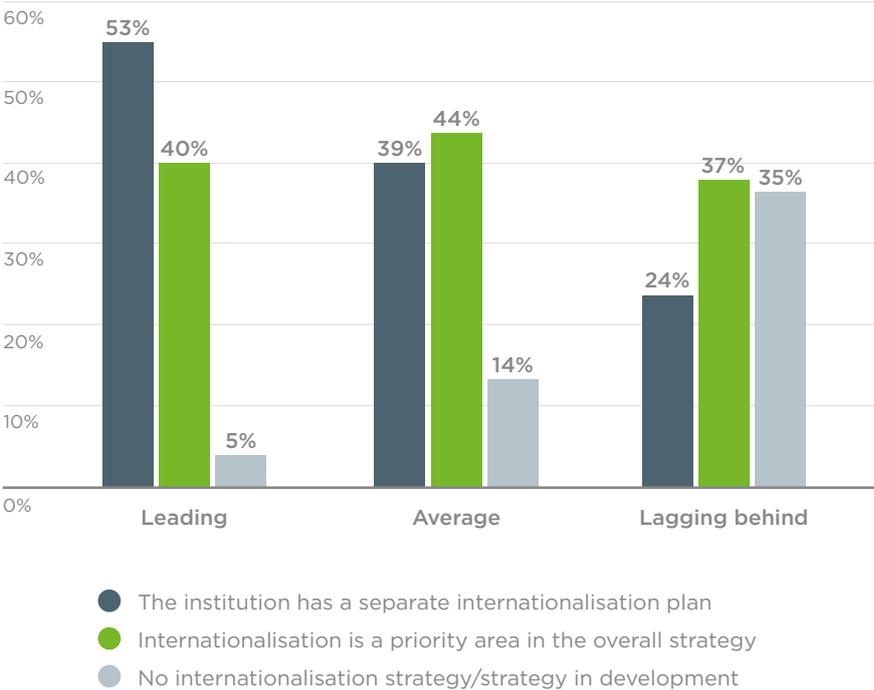### Presence of internationalisation strategies

More than one-third of the HEI respondents (38%) indicate that their institutions have separate strategic plans for internationalisation. Almost half (46%) indicate that, although their institutions do not have a separate strategic plan, internationalisation features as one of the priority areas in the overall institutional strategy. Eleven per cent of HEI respondents indicate that a strategic plan for internationalisation is currently under development at their respective institutions. Only a small minority (3%) indicate that their institutions have not elaborated any specific strategic plan with regard to internationalisation.

The nature and level of elaboration of strategic plans for internationalisation extant at institutions seem to differ from country to country. The existence of separate and dedicated strategic plans for internationalisation is quite common in a number of countries in Northern, Central and Western Europe. A separate strategic plan for internationalisation seems far less common in Eastern and Southern Europe. Nevertheless, the data indicates that, although in most countries internationalisation is most commonly not addressed in a separate strategic plan, internationalisation is still one of the priority areas in the overall institutional strategy.

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2  Respondents were asked to rank their higher education institution as leading, average or lagging behind in comparison to other institutions in their country with respect to internationalisation.

Institutions *leading* in internationalisation have a separate strategic plan for internationalisation more often than institutions considered less successful. In fact, just over half (53%) of higher education institutions perceived to have a *leading* position in internationalisation have a separate strategic plan for internationalisation, compared to 39% and 24% of institutions characterised as a*verage* or *lagging* behind, respectively. In contrast, among institutions *lagging* behind in internationalisation, a significant number (35%) have not established any strategy for internationalisation or declare that a strategic plan for internationalisation is still under development, compared to only 5% of the *leading* institutions (Figure 3).

**Figure 3**

**Presence of internationalisation strategies by level of internationalisation (N=1539)***



- ● The institution has a separate internationalisation plan
- ● Internationalisation is a priority area in the overall strategy
- ● No internationalisation strategy/strategy in development

*These differences are statistically significant (p<0.05)

## *Content of internationalisation strategies*
At the vast majority of institutions, the aspect of student mobility appears to play the most significant role in strategic plans for internationalisation. Aspects such as strategic partnerships (79%) and international research and innovation (79%) also seem to enjoy a large consensus amongst institutions. Staff mobility is also a significantly high priority (73% outgoing and 71% incoming). Internationalisation of the curriculum appears as part of strategies developed at 68% of institutions, and internationalisation at home in strategies at 56%. However, compared to the content of internationalisation strategies, there seems to be a marked disconnect between the reasons for internationalising and how internationalisation is implemented. While the top three reported reasons to internationalise are improving the quality of education, preparing students for a global world and attracting more international students, the most commonly featured activities in institutional strategies are reportedly incoming and outgoing student mobility, international strategic partnerships and international research and innovation. This disconnect may partially be explained by the response options available within the survey; the respondents could not choose indicators of quality of internationalisation as activities included in their internationalisation strategy.

The source of institutional funding frequently correlates with the main components of a higher education institution's internationalisation strategy. Privately funded institutions concentrate more often on the aspect of international strategic partnerships: 91% for privately funded institutions versus in 77% for publicly funded institutions. The component of marketing and promotion also tends to be more commonly indicated by respondents from privately funded institutions: in 67% of the responses for privately funded institutions, versus 48% for publicly funded institutions. A sizeable disparity is likewise perceptible with regard to the aspects of international rankings and international reputation, declared in 58% of the responses for privately funded institutions, versus 44% for publicly funded institutions. There is also a distinct discrepancy in the responses from privately and publicly funded institutions with regard to incoming and outgoing staff mobility: the former is indicated in 73% of the responses for publicly funded institutions, but only 59% of privately funded institutions, whereas the corresponding numbers for the latter are 75% and 57%, respectively.

When considering cross-national differences in internationalisation strategies, the component of international student mobility, incoming or outgoing, consistently comes to the fore as the main aspect of internationalisation strategies in almost all countries. A marked difference is apparent in the United Kingdom, where the emphasis in internationalisation strategies converges mainly on strategic partnerships, although this aspect also garners high interest in countries such as Cyprus, Ireland, the Russian Federation, Spain and Switzerland. Internationalisation of the curriculum appears among the top three components for higher education institutions' internationalisation strategies in Belgium (French), Estonia, Georgia, Germany, Italy and Switzerland. Staff mobility, meanwhile, appears among the top three priorities for institutions' internationalisation strategies in 11 countries.

Institutions *leading* in internationalisation are more often cited to include international research and innovation in their internationalisation strategies than institutions *lagging behind* in internationalisation. *Leading* institutions likewise appear to pay particular attention to their positions on international rankings and their international reputations, in contrast to institutions perceived to be *average* or *lagging behind* in internationalisation: a more than 30 percentage points difference marks those institutions perceived as leading from those identified as *lagging behind*. Moreover, 72% of the *leading* institutions have included incoming staff mobility in their internationalisation strategies. In comparison, 73% of the *average* institutions and 58% of those *lagging behind* have included this component.

Generally, higher education institutions that enrol a large number of international students seem more often inclined to cite a wide variety of components with regard to their internationalisation strategies. In effect, 70% of institutions that host more than 2000 international students per year seem highly concerned with their positions on international rankings. By contrast, only 35% of institutions with fewer than 500 international students are concerned with this aspect in their internationalisation strategies. Moreover, capacity building in developing countries seems to be important for 42% of the institutions with larger international student numbers, whereas only 17% of institutions with smaller international student numbers have included this aspect in their internationalisation strategies.

### *Internal organisation of internationalisation*
In almost half of the institutions (46%), responsibility for internationalisation rests in the hands of the board or the institution's central management. At some institutions (13%), the internationalisation portfolio is the responsibility of a specific board member; at others, it lies in the hands of the head of the internationalisation office or a specific committee or a task force created for the purpose. Only a few institutions (3%) have not formally established a focus person or body responsible for internationalisation.

When it comes to the organisation of internationalisation, half of the institutions have only one office specialised in addressing internationalisation aspects, and in only 5% of the institutions are internationalisation responsibilities entirely decentralised. One in four institutions have established multiple offices for addressing a variety of internationalisation aspects, along with a coordinating body across the institution. This form of organisation constitutes an important model for *leading* institutions: it is featured in 32% of the *leading* institutions versus 16% of those *lagging behind*. Institutions *lagging behind* often establish only one office specialised in addressing internationalisation aspects (50%); at institutions *leading* in the field, single-focus offices seem to appear relatively rarely (38%). Across national borders, variations in the distribution of internationalisation responsibilities are minor. In most countries, internationalisation is primarily managed and implemented by a single internationalisation office; exceptions include Belgium (Flemish), Finland, the Netherlands and Sweden, where multiple offices (with coordination) specialised in internationalisation are frequently the norm.

Moreover, the internal organisation of internationalisation has no direct relationship with the manner in which institutions formulate their internationalisation strategies.

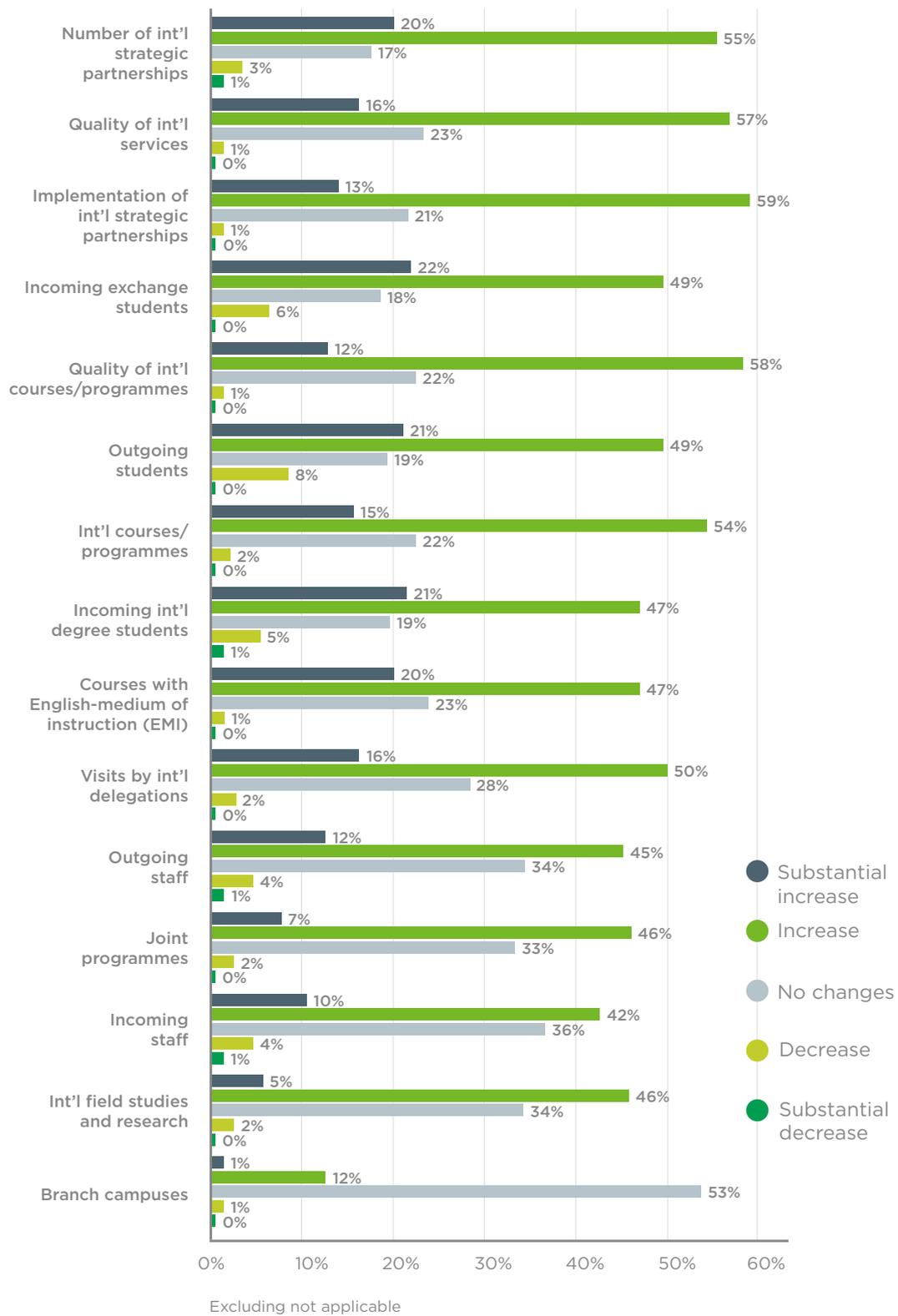### *International student numbers by level of internationalisation*
Unsurprisingly, higher education institutions viewing themselves as leading appear more often to host larger international student numbers compared to higher education institutions perceived as lagging behind. Yet, there appears to be no perfect correlation between the size of an institution's international student body and its level of advancement in internationalisation. Indeed, a third of the higher education institutions that view themselves as leading host fewer than 500 international students.

## 1.5  TRENDS IN INTERNATIONALISATION
The data suggests a large number of substantial increases in internationalisation developments. Trends are characterised by growing activity in international strategic partnerships, including their formal implementation; incoming and outgoing exchange students; and incoming international degree-seeking students. Developments in recent years have been marked by stark intensification on the improvement of the quality of international courses and programmes, as well as in the enhancement of the quality of services offered to international students (e.g. accommodation, academic tutoring, etc.). A noticeable increase is also observed in the number of courses and programmes with an international component and with English as the medium of instruction (EMI). Conversely, developments with regard to the extension of branch campuses are minor: less than 5% (Figure 4).

**Figure 4**

Perceived changes in internationalisation activities over the past three years
(N=1365)



Number of int'l strategic partnerships
- Substantial increase: 20%
- Increase: 55%
- No changes: 17%
- Decrease: 3%
- Substantial decrease: 1%

Quality of int'l services
- 16%
- 57%
- 23%
- 1%
- 0%

Implementation of int'l strategic partnerships
- 13%
- 59%
- 21%
- 1%
- 0%

Incoming exchange students
- 22%
- 49%
- 18%
- 6%
- 0%

Quality of int'l courses/programmes
- 12%
- 58%
- 22%
- 1%
- 0%

Outgoing students
- 21%
- 49%
- 19%
- 8%
- 0%

Int'l courses/programmes
- 15%
- 54%
- 22%
- 2%
- 0%

Incoming int'l degree students
- 21%
- 47%
- 19%
- 5%
- 1%

Courses with English-medium of instruction (EMI)
- 20%
- 47%
- 23%
- 1%
- 0%

Visits by int'l delegations
- 16%
- 50%
- 28%
- 2%
- 0%

Outgoing staff
- 12%
- 45%
- 34%
- 4%
- 1%

Joint programmes
- 7%
- 46%
- 33%
- 2%
- 0%

Incoming staff
- 10%
- 42%
- 36%
- 4%
- 1%

Int'l field studies and research
- 5%
- 46%
- 34%
- 2%
- 0%

Branch campuses
- 1%
- 12%
- 53%
- 1%
- 0%

Legend:
- Substantial increase
- Increase
- No changes
- Decrease
- Substantial decrease

0% 10% 20% 30% 40% 50% 60%

Excluding not applicable

## Cross-national differences in trends

The recent trends and developments in internationalisation demonstrate significant differences between countries. In Bulgaria, Georgia, Greece, Portugal, the Russian Federation, Slovenia and Ukraine, strategic partnerships with foreign institutions constitute the most positively affected aspect. The attention conferred to the quality of services for international students is quite high in Belgium (French), Germany, Ireland and Italy. Meanwhile, in the Czech Republic, Estonia, Latvia, Norway, Poland and Romania, the increase in the number of incoming exchange students each year constitutes the most important trend. Courses and programmes with an international component are the most important recent development in Denmark, while the quality of programmes is the most significant recent trend in the Netherlands. In Turkey, the aspect of outgoing staff mobility seems to figure highest.

## Trends by internal institutional organisation

Trends and developments in internationalisation differ depending on the level of distribution of responsibilities within the institution with regard to internationalisation. When a specific board member is in charge of the strategic plan, internationalisation makes a lasting impression in several areas. Contrariwise, when the main responsibility for internationalisation is distributed along lower echelons of the institution's hierarchy, the outcomes of internationalisation have less remarkable lasting effects.

Overall, with regard to internal responsibility and structures for internationalisation, it appears that the best results are seen where responsibility for the internationalisation strategy rests in the hands of a relatively high level of authority within the institution and where internationalisation is organised in the form of decentralised offices with a coordination mechanism. In the latter case, activities such as the quality of international services, the quality of international courses/programmes, joint programmes, courses with an international component and the implementation of strategic partnership agreements show notably high increases, whereas a single international office outperforms the other organisational forms in terms of outgoing students, incoming and outgoing staff and the number of international strategic partnerships.

The analysis shows that the extent to which trends and developments are monitored relate to the types of trends observed. When monitoring and evaluation takes place regularly at the national or institutional level, attention to the quality of services for students as well as the quality of international courses rises. Increases in the number of incoming exchange students are also reported. Where no regular monitoring and evaluation of developments is reported, all aspects make slower progress and may even regress.

## Trends by presence of internationalisation strategies

The disparities of developments between institutions that have a strategy for internationalisation and those that have not elaborated strategy and/or are still in the process of developing one are marked by 10 to 15 percentage points. Meanwhile, differences in trends between institutions with a separate internationalisation strategy and those that have integrated internationalisation in the priority areas in their overall institutional strategies appear small, with the former showing a somewhat larger increase. Increases in joint programmes and strategic partnerships correlate with the existence of a strategic plan for internationalisation, either separate or integrated within institutional strategies. The data clearly indicates that strategic attention to internationalisation is also positively related to an increase in incoming international staff and delegation visits from foreign institutions.

## Trends by sources of funding and level of internationalisation

Certain important trends differ according to the type of funding institutions receive. Privately funded institutions view strategic partnerships with foreign institutions as an important trend considerably more often than publicly funded institutions. Additionally, although only one out of five privately funded institutions report that branch campuses are a trend, among publicly funded institutions the ratio is even lower: one out of ten.

Furthermore, the level of internationalisation and the intensity of institutions' activities in internationalisation seem clearly connected. The most distinguished trends amongst *leading* institutions show the importance assigned to aspects such as incoming staff mobility, incoming international degree and credit students and courses with English as the medium of instruction.
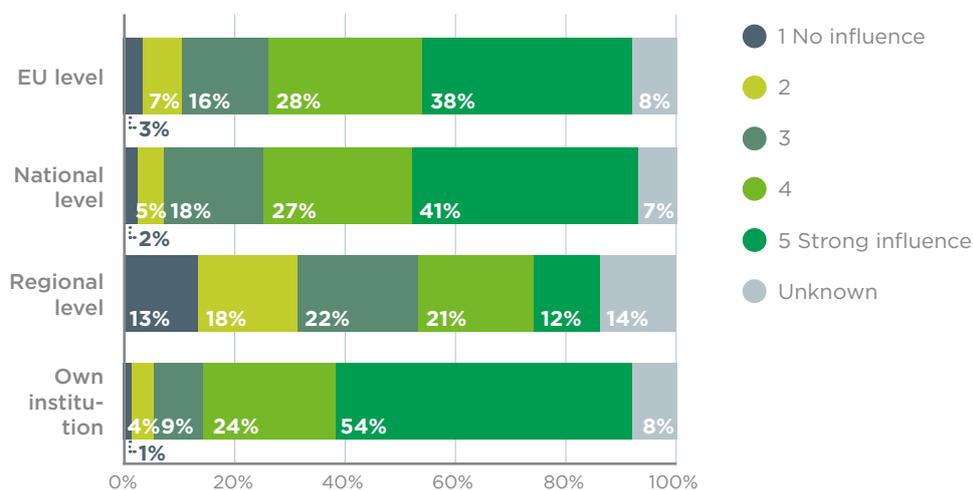
## 1.6 SHAPING INTERNATIONALISATION POLICIES

### *Influence of policy levels*

More than half of the HEI respondents (54%) maintain that the internationalisation policy of their respective institutions is strongly influenced by internal institutional efforts. At the same time, institutions are strongly influenced by governmental organisations and/or bodies at the national level (41%) as well as by supranational organisations and/or bodies at EU level (38%). In general, regional-level organisations and/or bodies do not usually play a primary role in shaping institutional internationalisation policies (Figure 5).

**Figure 5**

Perceived influence of policy levels on institutional internationalisation policy (N=1476)



### *Cross-national differences in policy influence*

The influence national policies exercise on institutions' internationalisation policies differs from country to country. Remarkably, in several countries, supranational EU-level policies on internationalisation are perceived as more influential than internationalisation policies elaborated at the national level. Notably, this is mainly the case in Austria (75% EU versus 50% national), Belgium (Flemish and French), Bulgaria, Cyprus, Portugal, Slovenia and Spain (where this more than a 10-percentage-point difference). Internationalisation policies elaborated at the national level are more dominant in Denmark, Estonia, Finland, Hungary, Ireland, Norway, the Russian Federation, Sweden, Switzerland, Ukraine and the United Kingdom. The influence of both national- and supranational EU-level policies on institutional internationalisation policy is equally exercised in Croatia, France, Germany, Greece, Italy, Latvia, Lithuania, the Netherlands, Poland and Romania. On average, internationalisation policies elaborated at the regional level appear to exercise a strong influence in 33% of the institutions observed, notably in Belgium (Flemish), Cyprus, Italy, Lithuania, Poland, Spain, Switzerland and Turkey.

### *Differences by level of internationalisation in policy influence*

Institutions *leading, average* or *lagging behind* in internationalisation perceive about the same level of influence exercised by the national level on institutional internationalisation policies: 30% of the institutions *leading* in internationalisation consider the national influence to be strong. Roughly the same percentage is observed amongst institutions *average* or *lagging*

*behind.* Disparities appear much larger when the influence of institutions' own efforts are considered: 61% of the *leading* institutions claim that they experience a strong influence on internationalisation from within their own institutions. This percentage drops to only 5% in institutions *lagging behind* in internationalisation.

## *Monitoring and evaluating developments*

Monitoring and evaluation of internationalisation often takes place at the institutional level (64%); however, monitoring and evaluation activities organised at and exercised by the national level also appear very important. In fact, half of the HEI respondents indicate that monitoring and evaluation activities are organised at the national level. Only 8% of the HEI respondents indicate that there are no monitoring and evaluation activities for internationalisation. Additionally, a larger percentage of non-HEI respondents indicate that no monitoring activities are conducted at any level (15%) or that they are unaware of any regular evaluation activities that may be in place for internationalisation (18%).

## *Cross-national differences in monitoring and evaluation*

Monitoring and evaluation exercised at the national level is strong in Denmark, Estonia, Finland, France, Norway and the Russian Federation. Monitoring and evaluation is particularly prevalent at the regional level in Albania, Belgium (Flemish and French), Bulgaria, Denmark, Italy and Romania. At the institutional level, such activities are omnipresent throughout institutions in the EHEA, although in Germany, Norway and Spain they occur slightly less frequently. Few respondents report an absence of monitoring and evaluation activities for internationalisation; remarkable exceptions exist in Germany (18%), Spain (25%) and Switzerland (22%).

## *Differences by level of internationalisation in monitoring and evaluation*

Institutions *leading* in internationalisation monitor and evaluate internationalisation developments more often than other institutions (68%). This contrasts with institutions perceived as *average* in internationalisation, for which 59% declare regular internal monitoring and evaluation, and with those institutions identified as *lagging behind*, for which 45% report regular internal monitoring and evaluation. Only 5% of the *leading* institutions do not conduct any monitoring or evaluation activities for internationalisation. In contrast, 19% of the institutions *lagging behind* indicate that no monitoring or evaluation of internationalisation is conducted.

## *Differences by presence of internationalisation strategies in monitoring and evaluation*

In reviewing the highest levels of occurrence of monitoring and evaluation activities, a positive correlation with the presence of an internationalisation strategy may be detected at national and institutional levels. This fact holds true for institutions that have elaborated a separate strategy for internationalisation and those that have integrated internationalisation into their overall strategic plans. About two-thirds of the institutions with well-defined internationalisation strategies monitor and evaluate internationalisation on a regular basis at the institutional level. In contrast, internal monitoring and evaluation of internationalisation activities is significantly less frequent (35%) at institutions with no internationalisation strategy or where an internationalisation strategy is still under development.
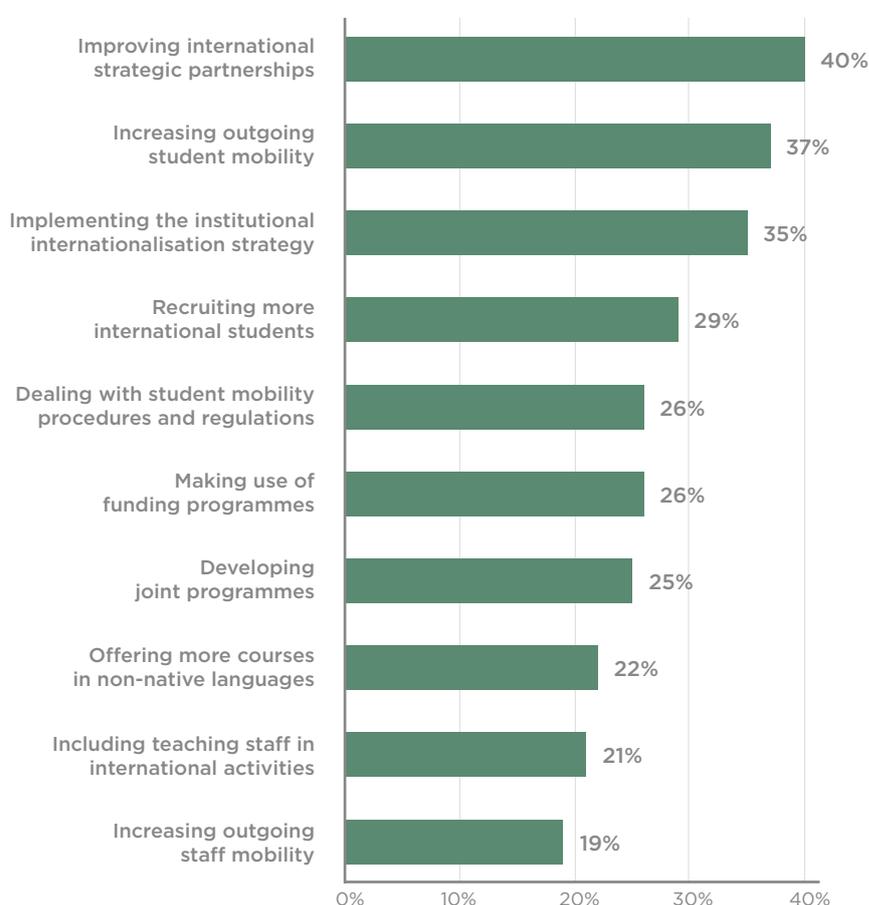
## 1.7 SKILLS AND KNOWLEDGE OF INTERNATIONALISATION STAFF

### *Challenges: cross-national differences*

Across all the EHEA countries, three main challenges come to the fore with respect to staff working on internationalisation, notably: improving international strategic partnerships (40%), increasing outgoing student mobility (37%) and implementation of the internationalisation strategy of the institution (35%) (Figure 6). Nevertheless, a few marked differences do appear cross-nationally. In Bulgaria and Turkey, the aspect of student mobility procedures and regulations is perceived as the key challenge. In Ukraine, increasing incoming staff mobility is cited as the number one challenge. In Sweden, ensuring teaching capacity for international education appears to be key to furthering the internationalisation agenda. Strategies to raise the number of international students are core issues in Estonia, Ireland, Italy, Latvia, Lithuania, Poland, Romania and the Russian Federation.

### Figure 6

**Main challenges in daily work for internationalisation staff (multiple answers possible) (N=1771)**



| Challenge | Percentage |
|---|---|
| Improving international strategic partnerships | 40% |
| Increasing outgoing student mobility | 37% |
| Implementing the institutional internationalisation strategy | 35% |
| Recruiting more international students | 29% |
| Dealing with student mobility procedures and regulations | 26% |
| Making use of funding programmes | 26% |
| Developing joint programmes | 25% |
| Offering more courses in non-native languages | 22% |
| Including teaching staff in international activities | 21% |
| Increasing outgoing staff mobility | 19% |

### *Differences by institution size and international student numbers*

The challenges reported by respondents from HEI institutions vary by the number of international students enrolled. Staff at institutions with large international student numbers struggle to a greater extent with the implementation of the internationalisation strategy, improving international strategic partnerships and measuring the impacts of internationalisation, while their colleagues at institutions with fewer international students are primarily challenged by aspects such as increasing outgoing student mobility, increasing staff mobility and involving teaching staff in international activities.

Differences in the challenges encountered can to a lesser extent be seen when the overall enrolment of institutions is considered. Staff working at smaller institutions (fewer than 5000 students) are more often solicited to focus on recruiting more international students. Staff working at medium-sized (5000–20 000 students) and large (more than 20 000 students) institutions are more often challenged in their daily work by aspects such as the implementation of the internationalisation strategy of the institution.

### Assessment of skills and knowledge

Higher education staff working in internationalisation are generally satisfied with their skills and knowledge levels with respect to their tasks and responsibilities in internationalisation. Yet, staff working at institutions with no developed internationalisation strategy or with a strategy under development more often assess their skills and knowledge as insufficient. By contrast, a large majority of staff working for higher education institutions with an elaborated, separate strategy for internationalisation or for institutions that have included internationalisation as one of the priority areas assess their own skills and knowledge as good or even excellent. Assessments are generally less favourable in respondents' perceptions of the proficiency levels of their working teams. These drops in proficiency are equally observed in institutions with or without a strategic plan for internationalisation.

### Skills needs: cross-national differences

For respondents within the EHEA there is a particular need to improve: a) project or programme management skills; b) staff management and leadership skills; c) skills for developing and maintaining international partnerships; d) marketing skills; and e) proficiency in other languages than English. Some countries have specific, high-priority skills needs. This seems to be the situation, for instance, in Cyprus, Germany and Sweden, where skills related to staff management and leadership rank as the top perceived need (while these skills are ranked lower in other countries). In Bulgaria, information technology skills seem to be most needed, while inter-cultural skills are identified as the top need in Austria. Financial skills are the top perceived need in Belgium (French) and Greece. Whereas proficiency in English does not rank among the top five needed skills in any country, proficiency in languages other than English is ranked as the primary needed skill in Ireland, Poland, Switzerland and the United Kingdom.

### Skills needs: differences by area of activity

Marketing skills and skills for developing and maintaining international partnerships tend to be universally needed in the main areas of internationalisation activities, albeit with slight variation between activity areas. When the skills needs perceived as very important are compared with the importance of certain skills for specific areas of internationalisation activities, the stated needs are in fact relatively modest. Conversely, the needs for less important skills are relatively high.

### Skills needs: differences by size of international student body

Regardless of the number of international students present at a higher education institution, staff in charge of internationalisation indicate a strong need to improve their performance in marketing skills and in skills to maintain international partnerships. Staff at institutions with fewer than 500 international students express a relatively strong need for developing their financial skills; those at institutions with an intermediate number of international students (500 to 2000) express needs for developing their information technology skills; and finally, staff institutions with more than 2000 international students express a strong need for developing their proficiency in languages other than English.

### Knowledge needs: cross-national differences

For all HEI respondents across the EHEA, knowledge building should concentrate on preparing and familiarising internationalisation staff with: a) the latest trends and developments in internationalisation; b) external funding programmes; c) developing an internationalisation strategy; d) evaluation of international policies and programmes; and e) market intelligence about target groups and countries. In most countries the main focus with concern to

knowledge needs is on the latest trends and developments in internationalisation, albeit a few interesting exceptions may be observed. The Czech Republic, Latvia, the Russian Federation, Slovenia and Switzerland need knowledge with regard to developing an internationalisation strategy. Bulgaria, Greece and Italy more often express a relatively strong need for knowledge on the evaluation of international policies and programmes. This need is also present in Belgium (Flemish), Denmark, Finland, Hungary, Ireland, Switzerland and the United Kingdom. Bulgaria, Ireland and Latvia identify a relatively strong need for knowledge on international curriculum development.

### *Knowledge needs: differences by level of internationalisation and area of activity*
A third (35%) of institutions *lagging behind* in internationalisation express a strong need for knowledge on developing an internationalisation strategy, whereas only 20% of institutions *leading* in internationalisation express a need for the same aspect. Similar differences seem to exist with regard to knowledge needs on external funding.

On average, knowledge needs appear stronger than skills needs. Notwithstanding the area of their activity, approximately a quarter of the HEI respondents express strong knowledge needs, particularly for knowledge on external funding programmes. Staff working on (exploring) international opportunities for students express a strong need for knowledge on external funding in particular. Staff involved in internationalisation policies regard the aspect of knowledge on latest trends and developments in internationalisation as highly important. Conversely, only a quarter of all respondents indicate a strong need for more knowledge in this particular area.

### *Knowledge needs: differences by size of international student body*
Staff working for institutions with small numbers of international students express stronger knowledge needs than staff working for institutions with larger numbers of international students. In general, the content of knowledge needs is quite similar across institutions yet certain differences can be discerned. Institutions with small or medium numbers of international students express a need for knowledge concerning the development of an internationalisation strategy.

## 1.8 CONCLUSION
The EAIE Barometer 2014 was developed in response to the need for comprehensive research to effectively map the state of internationalisation in the EHEA, particularly from the point of view of the actors directly involved in internationalising higher education. The findings of the Barometer study present a picture of the current state of affairs regarding internationalisation of higher education in the EHEA and provide a wealth of data and information on key developments, challenges and the skills and knowledge requirements of staff working to implement internationalisation within higher education institutions. While some of the results confirm findings from earlier surveys and professional knowledge, others offer valuable new information for institutional leaders and staff as well as for professionals working toward capacity building in higher education, higher education governance stakeholders and policy makers.

### *Rationales for internationalisation*
The EAIE Barometer 2014 results indicate that the most prevalent rationales for internationalisation reflect educational values and institutional missions, whereby internationalisation is an inextricable element of the educational process. By internationalising, institutions throughout the EHEA most often aim to improve the overall quality of higher education, prepare students for the challenges of a globalised world, and attract more international students. Other rationales, such as rising in the rankings and financial benefits, are also common, but usually not primary; the former are more frequently adopted by *leading* institutions, while the latter are more common among institutions l*agging behind* in internationalisation and privately funded institutions.

### Successful internationalisation

The findings of the EAIE Barometer 2014 show that higher education institutions *leading* in internationalisation have several characteristics in common. Typically, such institutions either have a fully developed strategic plan for internationalisation or internationalisation is a specific priority within the overall institutional strategic plan. Their strategic plans tend to concentrate heavily on international research and innovation, but also frequently include features such as strategic partnerships, international rankings and international marketing and promotion. Strategic attention to internationalisation helps increase the chances of success; *leading* institutions are more likely to see progress in incoming staff mobility, incoming international degree and exchange students and courses with English as the medium of instruction. There is also a strong sense of institutional autonomy in determining international policy, and they monitor and evaluate their internationalisation activities regularly and often. Staff working on internationalisation at such institutions usually feel they have the skills and knowledge they need to accomplish their tasks and meet the challenges that internationalisation brings.

### Trends in internationalisation

Data from the EAIE Barometer 2014 point to several internationalisation trends across the EHEA. Internationalisation activities are increasing in particular areas; there are more (active) international strategic partnerships, and ever-greater numbers of students are studying abroad. With greater student numbers, greater attention is paid to the quality of courses and programmes and of services for international students. More courses and programmes are offered with an international component and with English as the medium of instruction in order to open access to international students.

### Internationalisation staff needs and challenges

The EAIE Barometer 2014 also reveals general trends that appear at the individual level for staff who work on internationalisation within higher education institutions; generally, they express the need to improve their project and programme management skills, management and leadership skills, skills for developing and maintaining international partnerships, marketing skills and proficiency in other languages than English. To succeed in their work, staff also need knowledge related to the latest trends and developments in internationalisation, external funding programmes, developing an internationalisation strategy, evaluation of international policies and programmes and market intelligence about target groups and countries.

Internationalisation staff are often challenged by working to improve international strategic partnerships, increase outgoing student mobility and implement the internationalisation strategy. The presence of an institutional strategy for internationalisation and the size of the international student body are major determinants of the types of skills and knowledge staff need. At institutions without an internationalisation strategy and at institutions with fewer than 500 international students, staff are more likely to profess they lack the skills and knowledge necessary to successfully implement internationalisation.

### Final remarks

The EAIE intends to conduct the Barometer study on a recurrent basis with the aim of increasing the number of respondents and thereby the representation of the results. This first edition marks the first foray into mapping the state of internationalisation of higher education across the EHEA with particular emphasis on gathering input from the actors directly involved in implementing internationalisation. For internationalisation of higher education is continuously evolving: the challenges of internationalising curricula, developing transformative learning opportunities, and linking the local with the global to prepare all students for the challenges of the modern world are still new to many who take up the task. As they gain experience and develop new skills, staff who work at internationalisation can provide informative insights, which, when analysed via the EAIE Barometer, can help inform institutional leaders, international peers and policy makers at every level.

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