Trends & Issues in International Higher Education:

Robin Middlehurst
Outline

• **Features of the ‘internationalisation’ landscape:**
  - International Mobility – global & regional
  - International Education
  - Branch Campuses
  - Global Networks: research, education, public-private
  - Education Hubs
  - Online Education

• **Dynamic Regions**

• **Other issues...**
Foreign students enrolled outside country of origin, by region of destination, 2000 and 2010

<table>
<thead>
<tr>
<th>Region</th>
<th>Worldwide</th>
<th>Europe</th>
<th>North America</th>
<th>Asia</th>
<th>Oceania</th>
<th>Africa</th>
<th>Latin America and the Caribbean</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>2,071,963</td>
<td>920,140</td>
<td>569,640</td>
<td>214,744</td>
<td>118,646</td>
<td>99,117</td>
<td>31,058</td>
</tr>
<tr>
<td>2010</td>
<td>4,119,002</td>
<td>1,968,418</td>
<td>880,427</td>
<td>486,076</td>
<td>350,013</td>
<td>155,293</td>
<td>77,735</td>
</tr>
<tr>
<td>Percentage increase</td>
<td>98.8%</td>
<td>113.9%</td>
<td>54.6%</td>
<td>126.4%</td>
<td>195.0%</td>
<td>56.7%</td>
<td>150.3%</td>
</tr>
</tbody>
</table>

International Students

International students as a proportion of all students within higher education systems, 2010

- Australia: 21.2%
- Switzerland: 15.4%
- Denmark: 7.5%
- Canada: 6.6%
- Finland: 4.1%
- Japan: 3.4%
- Portugal: 2.9%
- Norway: 1.5%
- United Kingdom: 16.0%
- New Zealand: 14.2%
- Ireland: 7.0%
- Iceland: 4.9%
- Hungary: 4.0%
- United States: 3.4%
- Estonia: 1.8%
- Poland: 0.9%
- Austria: 15.4%
- Belgium: 8.8%
- Sweden: 6.9%
- Netherlands: 4.3%
- Slovak Republic: 3.4%
- Spain: 3.0%
- Slovenia: 1.7%
- Chile: 0.7%

International student market shares 2010

Market share 2010

Trends in international student market shares, 2000 and 2010

Change in market share 2000-2010

Australia: -6.3
Austria: 0.2
Canada: 0.0
China: 0.2
France: -0.3
Germany: -2.6
Italy: 0.5
Japan: 0.2
New Zealand: 1.3
Russian Federation: 1.9
South Africa: -0.7
Korea: 1.3
Spain: 1.2
United Kingdom: 2.2
United States: 1.5

A first federal-level strategy?

Figure 1: Framework for the U.S. Department of Education International Strategy

- **GOALS**
  - Strengthen U.S. education
  - Advance U.S. international priorities

- **OBJECTIVES**
  1. Increase global competencies
  2. Learn from other countries
  3. Engage in education diplomacy
  4. Integrated and coordinated activities and programs
European Mobility

Share of EU mobile student market, by EU country, 2010

- United Kingdom: 28.6% (123,192)
- Germany: 14.2% (60,998)
- Austria: 10.1% (46,618)
- France: 10.8% (43,341)
- Czech Republic: 5.9% (25,369)
- Netherlands: 5.1% (22,049)
- Greece: 3.5% (15,067)
- Italy: 3.3% (14,491)
- Spain: 3.4% (14,053)
- Belgium: 2.7% (11,526)
- Denmark: 1.9% (9,283)
- Hungary: 1.5% (8,112)
- Slovakia: 1.0% (6,459)
- Others: 2.2% (30,106)

Total EU mobile students: 430,664

Source: UNESCO Institute for Statistics
The number of English-language study programmes offered by Dutch universities has risen to more than 1,000.

The Netherlands is the biggest provider of English-language higher education in Europe (Nuffic, 2012).
Branch Campuses

• 200 degree-awarding IBCs worldwide + 37 over next 2 years
• Shift in activity from Middle East to Far East
• US universities have greatest number (78) but developing world expanding
• Trend towards more ‘niche campuses’

(OBHE 2012)
Laureate International Universities

- **United States**: Walden University, Kendall College, NewSchool of Architecture and Design, National Hispanic University (NHU) and Santa Fe University of Art and Design
- **UK/Netherlands**: University of Liverpool Online and University of Roehampton Online
- **Spain**: Universidad Europea de Madrid (UEM), Les Roches Marbella and Universidad Europea de Canarias (UEC)
- **France**: École Supérieure du Commerce Extérieur (ESCE), École Centrale d'Électronique (ECE) and Institut Français de Gestion (IFG)
- **Switzerland**: Glion Institute of Higher Education (Glion), Les Roches International School of Hotel Management and Les Roches Gruyère (LIG)
- **Germany**: Bits - Business and Information Technology School and BTG Group
- **China**: Hunan International Economics University (HIEU) and Les Roches Jinjiang
- **Japan**: St. Thomas
- **Thailand**: Stamford International University
- **Malaysia & Indonesia**: InteDucation Group
- **Australia**: Blue Mountains International Hotel Management School
- **New Zealand**: Media Design School
- **Brazil**: Universidade Anhembi Morumbi (UAM), Universidade Potiguar (UP), Universidade Federal do Rio Grande do Sul (UFRGS), School of Business Administration
- **Chile**: Universidad de Las Américas (ULA), Universidad Andrés Bello (UNAB), Instituto Profesional AIEP (AIEP), Escuela Moderna de Música (EMM), IEDE Escuela de Negocios and Universidad del Vina del Mar (UVVM)
- **Italy**: Università degli Studi di Milano (Bocconi), Università di Bologna (UNIBO), Università di Roma "La Sapienza" (Sapienza), Università di Padova (PD)
- **Cyprus**: European University Cyprus (EUC)
- **Turkey**: Istanbul Bilgi University
- **Jordan**: Royal Academy of Culinary Arts
- **India**: Pearl Academy of Fashion
- **Saudi Arabia**: Riyadh Polytechnic Institute (RPI) and The Higher Institute for Power and Water Technologies (HMPT)
- **Morocco**: Université Internationale de Casablanca (UIC)
- **Portugal**: Instituto Superior de Línguas e Administração (ISLA)
- **Central America**: Universidad Interamericana, Universidad Latinoamericana de Ciencia y Tecnología (ULACT), Universidad Tecnológica Centroamericana (UNITEC), Universidad Americana (UAM) and Universidad Latina
- **Ecuador**: Universidad de las Américas (UDLA)
- **Peru**: Universidad Peruana de Ciencias Aplicadas (UPC), Universidad Privada del Norte (UPN), CIBERT and Instituto Tecnológico del Norte
- **United States**: Baltimore, MD Worldwide Headquarters
NEW YORK UNIVERSITY BECOMES A GLOBAL NETWORK UNIVERSITY
Christopher Connell
International Educator, Jan/Feb 2012; 21, 1; Docatoe
pg. 46

NEW YORK UNIVERSITY BECOMES A GLOBAL NETWORK UNIVERSITY
Text and photography by Christopher Connell

President John Sexton says that NYU’s global network of campuses is building bridges across cultures and helping to ensure that all students have access to a full range of human experience.

NEW YORK UNIVERSITY'S prodigious number of international students (7,200) and participation in education abroad (4,300) have long solidified its place among the most international U.S. universities. Now it has laid claim to the title of the world’s first “global network university,” with a new liberal arts college open in Abu Dhabi, a second in the works for Shanghai, and nearly a dozen other sites around the world where NYU students go to study. Most of its 43,000 students still throng the buildings with their signature violet flags that surround Washington Square. Amending the 1831 pronouncement by Albert Gallatin and other founders that they were creating a university “in and of the city,” President John Sexton describes today’s NYU as “in and of the world.”
Education Hubs

UAE:
Abu Dhabi
Dubai
Ras-Al-Khaimah

Kuala Lumpur Education City
Iskandar

Bahrain

Singapore’s Global Schoolhouse

Education City, Qatar

South Korea: Incheon Free Economic Zone, Jeju Global Education City

Republic of Panama, City of Knowledge

Sri Lanka?
“On-line education is critical to the long-term strategy of my HEI” (69.1% of CAAs)

(Babson Survey, 2012)
## Total and Online Enrollment in Degree-granting Postsecondary Institutions – Fall 2002 through Fall 2011

<table>
<thead>
<tr>
<th></th>
<th>Total Enrollment</th>
<th>Annual Growth Rate</th>
<th>Total Enrollment</th>
<th>Students Taking at Least One Online Course</th>
<th>Online Enrollment Increase over Previous Year</th>
<th>Annual Growth Rate Online Enrollment</th>
<th>Online Enrollment as a Percent of Total Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2002</td>
<td>16,611,710</td>
<td>NA</td>
<td>1,602,970</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>9.6%</td>
</tr>
<tr>
<td>Fall 2003</td>
<td>16,911,481</td>
<td>1.8%</td>
<td>1,971,397</td>
<td>368,427</td>
<td>23.0%</td>
<td>11.7%</td>
<td></td>
</tr>
<tr>
<td>Fall 2004</td>
<td>17,272,043</td>
<td>2.1%</td>
<td>2,329,783</td>
<td>358,386</td>
<td>18.2%</td>
<td>13.5%</td>
<td></td>
</tr>
<tr>
<td>Fall 2005</td>
<td>17,487,481</td>
<td>1.2%</td>
<td>3,180,050</td>
<td>850,267</td>
<td>36.5%</td>
<td>18.2%</td>
<td></td>
</tr>
<tr>
<td>Fall 2006</td>
<td>17,758,872</td>
<td>1.6%</td>
<td>3,488,381</td>
<td>308,331</td>
<td>9.7%</td>
<td>19.6%</td>
<td></td>
</tr>
<tr>
<td>Fall 2007</td>
<td>18,248,133</td>
<td>2.8%</td>
<td>3,938,111</td>
<td>449,730</td>
<td>12.9%</td>
<td>21.6%</td>
<td></td>
</tr>
<tr>
<td>Fall 2008</td>
<td>19,102,811</td>
<td>4.7%</td>
<td>4,606,353</td>
<td>668,242</td>
<td>16.9%</td>
<td>24.1%</td>
<td></td>
</tr>
<tr>
<td>Fall 2009</td>
<td>20,427,711</td>
<td>6.9%</td>
<td>5,579,022</td>
<td>972,669</td>
<td>21.1%</td>
<td>27.3%</td>
<td></td>
</tr>
<tr>
<td>Fall 2010</td>
<td>21,016,126</td>
<td>2.9%</td>
<td>6,142,280</td>
<td>563,258</td>
<td>10.1%</td>
<td>29.2%</td>
<td></td>
</tr>
<tr>
<td>Fall 2011</td>
<td>20,994,113</td>
<td>-0.1%</td>
<td>6,714,792</td>
<td>572,512</td>
<td>9.3%</td>
<td>32.0%</td>
<td></td>
</tr>
</tbody>
</table>
Students taking 1+ online course
Growth in full on-line programmes

Type of Online Offerings - 2002 and 2012

- Public
  - 2002
  - 2012

- Private nonprofit
  - 2002
  - 2012

- Private for-profit
  - 2002
  - 2012

Legend:
- Online Courses and Full Programs
- Online Courses Only
- 2.6% US HEIs offer MOOCs
- 9.4% have plans to offer them
- 32.7% no plans for adding MOOCs
- 54% undecided
- Public universities have higher rates - 4.7% - than privates, for-profits (15% planning)
- Research universities twice as likely to be offering or planning MOOCs
- (N=2,800 colleges & universities)

(Babson Survey, 2013)
The strengthening of Asia Pacific

Chart 2: Journal Articles in All Fields, 1981 to 2009

Science papers per year, 1995-2009
China, Japan, Australia & India

US National Science Foundation data

(Marginson, 2012)
CIVETS countries
Focus on Outcomes

Leadership Foundation for Higher Education

Focus on Outcomes:

- Learning
- Undergraduate service-learning
- Community-based participatory research
- Experiential learning
- Qualitative
- Quantitative
- Student outcomes
- Graduate
- Research
- Experiences
- Graduate-level education
- Undergraduate
- Service-learning
- Students
- Fieldwork
- Programs
- Research
- Outcomes
- Service
**Employability**

Exhibit 2

**NEET rates among youth in OECD countries, 2011**

% of population aged 15-24

<table>
<thead>
<tr>
<th>Country</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>4</td>
</tr>
<tr>
<td>Denmark</td>
<td>6</td>
</tr>
<tr>
<td>Iceland</td>
<td>6</td>
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<td>Switzerland</td>
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<tr>
<td>Sweden</td>
<td>7</td>
</tr>
<tr>
<td>Austria</td>
<td>7</td>
</tr>
<tr>
<td>Slovenia</td>
<td>7</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>8</td>
</tr>
<tr>
<td>Finland</td>
<td>9</td>
</tr>
<tr>
<td>Norway</td>
<td>9</td>
</tr>
<tr>
<td>Germany</td>
<td>10</td>
</tr>
<tr>
<td>Japan</td>
<td>10</td>
</tr>
<tr>
<td>Canada</td>
<td>11</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>11</td>
</tr>
<tr>
<td>Estonia</td>
<td>11</td>
</tr>
<tr>
<td>Poland</td>
<td>11</td>
</tr>
<tr>
<td>Australia</td>
<td>11</td>
</tr>
<tr>
<td>France</td>
<td>12</td>
</tr>
<tr>
<td>Portugal</td>
<td>13</td>
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<tr>
<td>United Kingdom</td>
<td>13</td>
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<tr>
<td>Hungary</td>
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<tr>
<td>New Zealand</td>
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<tr>
<td>United States</td>
<td>15</td>
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<td>Slovak Republic</td>
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<td>Belgium</td>
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<tr>
<td>OECD</td>
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<tr>
<td>Ireland</td>
<td>18</td>
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<tr>
<td>Spain</td>
<td>18</td>
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<tr>
<td>Greece</td>
<td>18</td>
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<tr>
<td>Italy</td>
<td>19</td>
</tr>
<tr>
<td>Mexico</td>
<td>23</td>
</tr>
<tr>
<td>Turkey</td>
<td>30</td>
</tr>
</tbody>
</table>

1 OECD represents weighted averages. Q2 2011 for Australia; all others represent Q1 2011.
Exhibit 2

39% of employers say a skills shortage is a leading reason for entry-level vacancies

Lack of skills is a common reason for entry-level vacancies

% of employer respondents

36% of employers also reported a lack of skills caused “significant problems in terms of cost, quality, and time” or worse

<table>
<thead>
<tr>
<th>Country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>56</td>
</tr>
<tr>
<td>India</td>
<td>53</td>
</tr>
<tr>
<td>Brazil</td>
<td>48</td>
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<tr>
<td>United States</td>
<td>45</td>
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<tr>
<td>Mexico</td>
<td>40</td>
</tr>
<tr>
<td>Saudi Arabia</td>
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</tr>
<tr>
<td>Germany</td>
<td>32</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>30</td>
</tr>
<tr>
<td>Morocco</td>
<td>12</td>
</tr>
</tbody>
</table>
Other issues...

- Big data
- League Tables
- VFM
- ROI
- Impact
REPUTATION

We will be known forever by the tracks we leave.

-American Indian Proverb