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TRENDS AND CHALLENGES IN HIGHER EDUCATION INTERNATIONALISATION

Abstract: *The author deals with higher education internationalisation as a worldwide process, which is connected with the development of knowledge-based economy. The purpose of the paper is to point out the major attributes of universities' internationalization process and their changes, to identify the trends in flows of higher education services exports and imports and describe the formats and international policy focus of the chosen countries as to the process in question. The paper was based mostly on the numerous journal and Internet publications of international higher education experts, reports and international organizations' statistics. In separate subchapters the author analyses specific aspects of this process, e.g. the flow of mobile foreign students to specific countries, legal framework for HEI internationalisation, or fields of study chosen by mobile students. These variables are used in the ranking of host countries. Despite obvious benefits of HEI internationalisation, the author warns that copying other countries' systems, and other universities' measures and fully implementing them in a completely different environment may prove ineffective and inefficient. On the other hand, the best method of reaching the goals of HEI is in monitoring the environment, analyzing the benchmarks, understanding trends and challenges, and then determining the right strategy.*

Keywords: *education market, higher education, higher education institution (HEI), internationalisation, globalisation, international student factor, knowledge-based economy, mobile students, regression analysis, North America, Latin America, Poland, Slovakia*

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Introduction

The concept of knowledge-based economies raised the importance of education, particularly the higher education. In January this year Irina Bokova, UNESCO Director General declared "In our knowledge-based global economy, future prosperity and security will depend more than ever on being equipped with the right skills", suggesting that these skills are obtained through education [UNESCO, 2011]. Policy makers started to understand that only educated societies can build

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knowledge-based economies and challenge problems faced by the countries, regions and the whole world. Recently higher education is coming back to the agenda of international organizations, and new topics concerning its development gain interest. One of them is the process of universities' internationalization enhanced by economic and socio-political globalization. "As a result of globalization 20 percent of students now spend some time studying in a country other that their own." [10]

The words *globalisation* and *internationalisation* are sometimes treated as synonymous in publications. This article is not the case. Internationalization and globalization are considered different concepts. This attitude is shared by other authors. According to Altbach and Knight internationalisation includes "...the policies and practices undertaken by academic environment in order to gain"...commercial advantage, knowledge and language acquisition, enhancing curriculum with international content. "While globalisation is "...the content of economic and academic trends that are part of the reality of the 21ˢᵗ century." [4, p. 270] Globalisation, a mix of processes resulting" from social interaction on a world scale, such as the development of an increasingly integrated global economy and the explosion of worldwide telecommunications" [(25, p. 321] created the ideal environment for increasing the flows of people and information. The world economy and the world human resources market globalisation together with Internet mass implementation were the major stimuli for education to internationalise.

Internationalisation of companies has been a subject of research and numerous considerations for many years. Internationalization of higher education is a relatively new scientific debate topic. The purpose of the paper is to point out the major attributes of universities' internationalisation process and their changes, to identify the trends in flows of higher education services exports and imports and to describe the formats and international policy focus of the chosen countries as to the process in question. An article was based mostly on the numerous journal and Internet publications of international higher education experts, reports and international organizations' statistics.

Universities of Central and Eastern Europe have recently entered the international education market hoping not only to defend their local positions, but also to attract substantial numbers of the mobile students. Their governments started to implement administrative measures aimed at strengthening their best universities and promote excellence in research and teaching. The article supplies some information on higher education international market trends which can help to understand the environment in which these reforms are being implemented.

The Phases of Higher Education Institutions (HEIs) Internationalisation

A definition cited in a report illustrating internationalisation of higher education of SANORD (Southern African-Nordic Centre) countries captures the scope and the crucial aspects of the concept, by describing university internationalization as "The process of developing, implementing and integrating an international, intercultural

and global dimension into the purpose, functions and delivery of higher education" [Soersen, 2009, p. 8].

According to Ayoubi and Massoud the process of HEIs internationalization can be divided into three main phases [(5, p.329-330)]. In the first phase HEIs identify internationalization role and importance. They determine the model of internationalization to be adopted. Within this phase the HEIs include internationalization into their mission statements and strategic visions, and eventually to their corporate strategies and strategic plans. This phase can be called setting up "the design for internationalization" [(5, p.329)]. The next phase consists of the activities aimed at implementing the accepted earlier design. The final phase is characterized by the actions monitoring implementation of HEIs internationalization, investigating its obstacles and advantages.

The mentioned authors classified the literature on the universities internationalization into three groups of studies reflecting the three phases of the process described above. The three categories of studies are briefly presented in Table 1.

Table 1

Categories of studies on universities' internationalisation

Phase	Examples of content
First	**What the strategy of internationalization should be** Necessary components of a process Factors of the international strategy Importance of customer care, marketing skills, centralized management, risk management, cost benefit analysis, application of modern technology, specialization, reputation and branding, certification, decision making and governance Necessity of collaboration and consolidation Motives and objectives (joint educational projects, student exchange, staff exchange, curriculum development, administrative cooperation) Incentives (faculty development, financial advantages, international reputation) for international activities
Second	**How universities manage and organize their international activities** Selecting foreign partners Selecting target markets and customers Quality in managing and arranging the internationalization process (the mechanisms carried out during and after selecting partners, markets and customers)
Third	**Investigating whether the design is right and the implementation of the internationalisation process is properly done** Obstacles to internationalization (financial problems, cultural difficulties, development problems, language barriers) Benefits of internationalization (increasing market profile, diversification, reputation, opportunities for new income, interdisciplinary research and staff experience enhancement, opportunities to get professional knowledge and experience for students)

Source: based on: [(5, pp. 320-331)]

The first phase consists of researching the possibilities, determining and establishing the norms. The second one starts usually from what is called an internationalisation at home. It includes "attracting students from abroad, by offering international elements in their curricula and classes in English." [Adolphus, 2009 b]. Also faculty from various countries may be invited to teach. During this phase universities establish partnerships with institutions in which they look for support and assistance. The partnership with a first class university may bring the newly internationalising institution a lot of benefits. For example an alliance between MIT and a few Chinese universities in 1996, named the MIT-China Management Education Project improved the Chinese MBA education.

In the second phase of internationalization universities choose various methods of approaching and entering the foreign markets. Sometimes the methods change over time and the universities become more and more devoted to their international presence.

The third, advanced phase of HEIs internationalisation is focused on increasing the effectiveness and efficiency of activities by diversifying the offer, deepening the partnerships, and fighting the obstacles.

International Rankings Position vs Higher Education Services Exports

The knowledge metrics systems are quite new. Shanghai Jiao Tong University research university ranking was first published in 2003, The Times in 2007, research ranking by the Higher Education Evaluation and Accreditation Council of Taiwan in 2007, the Webometrics (ranking of universities presence on the Internet) in 2008. [(20, p.24)] They were, however, adopted very quickly as an instrument of measuring the institutions' performance and therefore evaluating the universities' reputation. Currently they strongly influence the number of applications from foreign students. According to some experts the rankings do not mirror the situation adequately: Chinese and Russian Science Academies, which consist of the numerous scientific institutes should not be presented in the same ranking with the individual universities, as there is no fair comparison of these two completely different categories of institutions ([34], p. 47). It would be much more rational to compare the universities with each of the institutes separately.

Leading the world rankings HEIs find it natural to go international, basing on their reputation. Such institutions are usually located in the countries which attract the big numbers of international degree students, as the international higher education export is very concentrated. (See Tables 2 and 3)

Table 2

Distribution of world top 500 research universities according to the Shanghai Jiao Tong ranking, 2008

Country	Number	Country	Number	Country	Number
United States	159	Italy	22	Belgium	7
United Kingdom	42	Canada	21	Austria	7
Germany	40	Australia	15	Israel	6
Japan	31	Netherlands	12	Finland	6
France	23	Sweden	11	Brazil	6
China mainland	18	Spain	9	New Zealand	5
China Hong Kong	5	Switzerland	8	Others	35
China Taiwan	7	Korea	8	including Poland, Russia, Singapore, Greece, Hungary, India. Chile, Portugal	2 each

Source: [(20, p. 46)]

The USA leading the ranking is the largest provider of international higher education. The major host countries group also include the UK, Australia, France Germany, and Japan. But there are the new countries (like China) which started strengthening their positions on the international higher education market, in line with their improved research rankings. The dynamics of international flows of mobile students between 2003 and 2009 to selected countries listed by regions is illustrated by the data in Table 3.

Table 3

International flows of mobile students to selected host countries, 2003-2009

Host country	2003	2004	2005	2006	2007	2008	2009
Saudi Arabia	11046	12199	12999	13687	17716	18725	19906
Czech Rep.	10338	14923	18522	21395	24483	27907	.
Hungary	12226	12913	13601	14491	15110	15459	.
Poland	7608	81118	10185	11365	13021	14965	.
Romania	9730	10486	10812	8587	9383	13857	.
Russian Fed.	68602	75786	90450	77438	60288	136791	.
Slovakia	1651	1548	1607	1613	1901	5197	.
Turkey	12729	15298	18166	19079	19257	20219	.
Ukraine	18170	15622	23259	26623	29614	32573	35780
Australia	188160	166954	177034	184710	211526	230635	.
China	.	.	.	36386	42138	51038	61211
China Hong Kong	2657	3270	3817	4905	6274	7362	9245
China Macao	17541	14627	12711	12087	11930	12648	14358
Japan	86505	117003	125917	130124	125877	126568	.
Malaysia	30407	23441	.	24404	30581	45383	.
New Zealand	26359	41422	40774	.	33047	31565	.
Philippines	4744	3495	4836	5136	.	2665	.
Rep. of Korea	7843	10778	15497	22260	31943	40322	.
Singapore	.	.	.	.	.	.	40401
Thailand	.	4170	4334	5601	8534	10915	16361

Source: International flows of mobile students at the tertiary level (ISCED 5 and 6); Table 18, available at: http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx [accessed March 6, 2011]

The number of international students attracted by the USA, the world leader in higher education exports, did not change much between 2003–2007. In 2008 a 4.8% growth was observed in comparison with 2007. In the UK, which ranked second in attracting overseas students, their number fell by almost 3% in 2008. There was a stabilisation of students' flow to France and a constant decrease of students' flow to Germany. Since 2005 there were no substantial changes in students' flow to Japan. In the same period of time, the numbers of students visiting Australia grew continuously by 4 up to 15% yearly. Also Italy managed to attract more and more international students each year, joining the segment of the Western European leaders in internationalization of HEIs. It is also worth noticing the consequent improvement of positions of Austria and the Netherlands. Some other countries, like Spain, Portugal, Sweden, Belgium, Denmark or Switzerland were not so successful in attracting the growing numbers of incoming students. The Russian Federation with over 130 thousand of mobile students in 2008 improved substantially its world position. However, in the whole analysed period the dynamics was not stable, both increases and decreases were observed. Russian universities target mostly the young people who speak Russian. They originate from the former Soviet republics. The same language suitability reasons make Ukraine an attractive destination for several thousand students from the region. In this context it should be mentioned that despite being the most popular in the internationalising universities, English is not the only language used in internationalising HEIs. For example, the students from Spanish speaking countries are the target for international universities in Spain.

Although still the USA, Australia, Japan, and a few Western European countries host the bulk of the international students, the new countries are just about to join the league. The data shows that in 2009 China, including Hong Kong and Macao attracted almost 85 thousand of overseas students. China wants to build its own educational brands basing on the foreign expertise. China Europe International Business School still relies heavily on foreign faculty [1]. Aware of the necessity of increasing the numbers of educated workforce, India, China and South Korea spend a lot of money on HE.

As previously mentioned, the countries of Central and Eastern Europe have recently begun their universities' internationalisation, therefore the numbers of foreign students who visit their HEIs are not substantial. The Czech Republic ranks first within the group, but also some other countries witnessed a rapid growth in foreign student numbers. According to the data in Table 3, between 2003 and 2008 they grew: in the Czech Republic by 270 percent, in Poland by 200 percent, and in Slovakia by over 300 percent.

In order to attract the foreign students, universities should develop good quality programmes in the carefully chosen disciplines. A distribution of international students by field of education in Poland and the Slovak Republic is illustrated in Table 4.

Table 4

Foreign students in Poland and the Slovak Republic by field of education in 2006 (%)

	Agriculture	Education	Engineering, Construction	Health & Welfare	Humanities & Arts	Sciences	Services	Social Sciences Business and Law
Poland	0.7	5.4	4.3	26	20	5.03	3.6	14.08
Slovak Republic	9.8	4.7	11.4	30.5	14.8	7.3	5.4	16.3

Source: [11]

In both countries, i.e. in Poland and in the Slovak Republic, the major mobile students' preferences were health and welfare sciences, followed by social sciences, business, law and humanities and arts. However, there are also structural differences between the two countries. In Slovakia agriculture gained a relatively big share of the foreign students population, while in Poland this field of education played a marginal role. Also relatively many students in Slovakia studied engineering and construction, while they found Polish polytechnics relatively less attractive.

It is interesting to compare the structure of students in Poland and Slovakia with the data on the fields of study chosen by the local students and the mobile students worldwide. The latter are presented in Table 5.

Table 5

Fields of study chosen by local students and mobile students worldwide, 2007 (%)

	Agriculture	Education	Engineering, Construction	Health & Welfare	Humanities & Arts	Sciences	Services	Social Sciences Business and Law
Local students	1	9	10	9	12	9	2	17
Mobile students	1	3	14	13	14	15	5	23

Source: Van der Pol, H.: New Trends in international student mobility, July 6, 2009, available at: http://www.uis.unesco.org/template/pdf/ged/2009/UIS_press_conference_presentation.pdf [accessed March 13, 2011]

It is easy to notice that the structure of mobile students in Poland and Slovakia differs from the world average. Both of these countries attract comparatively big numbers of students for health and welfare programmes. It is probably the result of their relative good value for the money attractiveness. At the same time, studies in the field of agriculture seem to be Slovakia's specialty. They attract about 10 percent of the total number of mobile students, while the world average is only 1 percent.

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The level of higher education internationalization can be estimated not only in terms of mobile student numbers hosted by a certain country, but also in terms of foreigners' shares in the total number of students. (See Table 6)

Table 6

Shares of cross-border students in their total number by host countries

Country	%	Country	%
United States	21	Japan	4
United Kingdom	12	Singapore	3
Australia	10	Malaysia	2
France	9	New Zealand	2
Germany	9	Canada	2
China	5	Others	21

Source: [20]

In 2007 in the US every fifth student was a foreign citizen, and in Australia every tenth student came from overseas. The share of the foreign students in the total number of students in China was relatively lower, but as indicated earlier, the number of foreign students attracted by this country was substantial.

Rationales and Benefits

Each year the International Association of Universities surveys higher education institutions from around the world on their internationalisation. The surveys trace the progress in perception of internationalization as an important aspect of HEI missions and strategies. The results show the rationales for internationalization and benefits of internationalisation as perceived by the universities. The survey conducted in 2009 among 745 universities from all the regions of the world identified top five rationales to go international [13]. They included:
1. student preparedness (29.96 percent)
2. curriculum and quality (16.80 percent)
3. profile and reputation (15.08 percent)
4. research and knowledge production (14.23 percent)
5. increase and diversity of students (9.31 percent).

The rankings of rationales in the universities established in various regions were not identical. For example, in North America and Latin America the student preparedness was more important than in Europe, as European students travel abroad more often than their American colleagues anyway. On the other hand,

increasing international profile and reputation was more important for European universities than for the institutions from North America, which take advantage of the relatively big local educational market [(19, p. 1)]. What was new in 2009 results in comparison to the ones published some years ago was a high position of reputation among the top reasons for HEIs to internationalize.

The same sample of HEIs declared the benefits of internationalisation they considered the most important [13]. The benefits included:

1. international awareness of students (24.05 percent)
2. strengthened research and knowledge production (15.93 percent)
3. cooperation and solidarity (12.46 percent)
4. internationalised curriculum (11.01 percent)
5. enhanced profile (10.65 percent)

An international students' awareness, getting them ready to live and work in intercultural environments was perceived as the most important benefit, while enhanced prestige/profile ranked fifth. According to Marmelejo, the only worrying difference between the regions was the fifth place of cooperation and solidarity in the ranking of benefits as perceived by the North American universities [(19, p. 1)].

The results of the survey made it also possible to identify the risks and obstacles for internationalization perceived by HEIs. Commercialization of education programmes seemed to be the crucial risk according to the universities from many continents. Not sufficient financial support was considered by the HEIs the major obstacle from all the regions of the world. [(19, p. 1)]

Activities vs Intentions to Internationalise

Even in the countries, which are major higher education exporters not all of the universities rely heavily on foreign students' flows. In each country there are some obvious leaders and the laggards, i.e. those only marginally involved in internationalisation processes. The United Kingdom is a good example of this situation. As many as 117 British higher education institutions were researched to determine to what extent UK universities' international achievements corresponded with their strategic intent of internationalisation. [5] An *international student factor* was built to serve as a proxy for the international achievements. It was constructed of the three components: a *percentage of overseas students to the total number of students* (EU students were included in the category of overseas students like other overseas students), a *percentage of overseas income to the total income of a university* (the income included the fees, research sources and other non-research sources outside the EU), *a percentage of market share of overseas first year students to the total overseas market share. International student factor* was identified by applying the factor analysis technique, and the regression method was used to calculate factor scores. Unfortunately, the available data were not recent, so the results reflected the situation in 2001 which may have changed since then. As expected, there are still today segments of universities characterised by the very different levels of

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internationalisation. The ten leaders and ten laggards of internationalisation in the UK in 2001 are indicated in Table 7.

Table 7

Leaders and laggards in internationalisation activities in UK

Leaders	*Int. student factor*	Laggards	*Int. student factor*
London School of Economics and Political Science	4.97	The North-East Wales Institute of Higher Education	-1.47
The School of Oriental and African Studies	4.21	Swansea Institute of Higher Education	-1.44
London Business School	2.89	Trinity College Carmarthen	-1.44
London School of Hygiene and Tropical Medicine	1.77	The University of Paisley	-1.24
Royal Academy of Music	1.76	University of Wales College, Newport	-1.22
Middlesex University	1.76	Glasgow Caledonian University	-1.17
The University of Westminster	1.46	The University of Teesside	-1.13
The University of Nottingham	1.37	Welsh College of Music and Drama	-1.1
Manchester Institute of Science and Technology	1.36	University of Gloucestershire	-1.08
University of Essex	1.32	St George's Hospital Medical School	-1.06

Numbers were rounded
Source: based on [(5, p. 334-341)]

There were big differences between British HEIs in the intensity of their internationalisation activities. The leaders were usually situated in big cities, while the segment of laggards consisted mostly of the local universities and colleges. Even such respected institutions as The University of Oxford (0.54558) and The University of Cambridge (0.87493) were not included in the top ten internationalised group.

To build the second construct describing the universities' strategic intent as to internationalisation, Ayoubi and Massoud applied a content analysis technique. They decided to find out whether certain words and concepts could be found in the strategic HEIs' documents. They restricted the analysis to universities' missions statements, as strategies, or vision statements were unavailable or non existent in many institutions [(5, p. 341, 342)]. The scores used to estimate the universities international strategic intent are described in Table 8.

Table 8

Scores used to determine the level of universities' international strategic intent

Scores	Description of wording used as interpretation of scores
0	No words or concepts connected with internationalization
1	The words mentioned: "international, global, overseas, worldwide..." or words having the same meaning as the indicated ones
2	"Either one of the following concepts mentioned: international partnership, agreement with overseas universities, overseas student recruitment, overseas staff exchange, overseas academic cooperation, joint degrees"
4	Two or more of the concepts mentioned above were indicated

Source: based on [(5, p. 342)]

The comparison of the declared UK universities' internationalisation intent with their actual activities enabled to divide them into clusters. The first one was named *International losers group* and consisted of 15 percent of all UK universities who showed low *strategic international intent factor* and also low *international student factor*. The second cluster named *International speakers group* included 37 percent of higher education institutions and was characterized by high *strategic international intent factor*, but low *international student factor*. The third group of *International winners* including also 37 percent of the total UK universities' population, recorded high loadings of both factors (*strategic international intent and international activities*). Finally, the fourth cluster of *International actors* including 11 percent of the UK universities were identified as characterized by high *strategic international intent factor* and low actual internationalization activities factor.

The results showed that slightly below 50 percent of British universities have been considerably engaged in some internationalisation processes, while only little above one third of them were undertaking these activities consciously considering them the instruments of their mission implementation. The research proved that not all the intentions demonstrated in the universities' missions, especially the ones concerning internationalisation have been reflected in the real world activities undertaken by them.

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Sources of Students in International Students' Flows

44 percent of the world's mobile students in 2007 originated from 15 countries. They were: China (leader of a group), India, the Republic of Korea, Germany, Japan, France, United States, Malaysia, Canada, the Russian Federation, Morocco, Turkey, Italy, Poland, Hong Kong SAR of China [33].

The Asian countries play a major role in sourcing the universities with overseas students worldwide. The structure of the student population by region of origin in the leading host countries is presented in Table 9.

Table 9

Distribution of foreign students in top eight host countries according to region of origin in 2004 as % of world total by regions, (excluding intra-EU students)

Regions of origin	Australia	New Zealand	Canada (2002)	UK	US	France	Germany	Japan
N.America	7.6	2.8	11.5	20	31.3	4.6	4.6	1.7
L.America & the Caribbean	1.3	0.1	5.4	5.4	44.4	6.3	5	0.8
EU-15	5.2	1.6	12.2	.	39.4	.	.	1.4
CEE	0.5	0.1	1.4	3.1	12	6.9	35	0.4
Arab States	1.3	0.1	6.5	7.1	9.4	40.6	8.8	0.3
Central Asia	0.2	0	0.3	1.2	4.2	1.6	9.6	1.2
S.&W. Asia	11.8	0.9	2.6	12.7	50.2	1.3	6.2	1.3
E. Asia &Pacific	14.3	4.2	2.8	13	32	3	5.6	15
Sub Saharan Africa	3.4	0.1	4.7	14.8	21.2	26.1	6.8	0.3
Other	6.5	0.6	2.2	20.4	14.4	4.9	7.6	0.2

Figures exclude intra-EU flows but includes students financed by other aid programs financed by the governments. Data were rounded. [6]

Leading host countries target students originating from various regions and countries. It is the language reasons that decide that the most important market for France is North Africa (Morocco, Algeria, and Tunisia), while for Germany it is Turkey. The UK and Canada, alike the US, attract many Asian students (China, India, Hong Kong, Malaysia, and Philippines). For example, at Michigan Technological University during Fall semester of 2010 there were 896 international students registered. The total number included 227 persons form India and 493 persons from China [MTU student enrollment 2010]. US universities are also the most important target for the students from EU-15, North America, Latin America

and the Caribbean. Students from the Central and Eastern Europe chose to study first of all in Western Europe and the US.

New Methods of Universities' Internationalisation

There were some signs of maturing the international higher education market in the nineties of the 20th century. It was believed that they were caused by the development of the local universities in the source countries, so more and more students could get a good quality education at home. Another cause was the increased cost of studying abroad, as a consequence of raising tuition fees [(17, p. 2)] Recently again the statistics show the growing numbers of students' flows between the countries, even though they might have been restricted to some extent by new phenomena. Some universities managed to apply a new concept of getting international position, other than bringing the foreign students to their campuses. They managed to reach them in places where they actually were. They did it by "establishing portal or satellite campuses in other countries …mostly…in the Middle East and East Asia" [Adolphus, 2009 b] The headquarters of the largest university in the world are situated near New Delhi. Indira Gandhi National Open University (IGNOU), the world leader in distance learning, has almost 3 million students in India and in 33 other countries. IGNOU established 52 overseas learner support centers and offers 175 certificate, diploma, degree and doctoral programmes in the countries of students' origin [UNESCO, 2011].

Some institutions decided for a physical presence abroad. For example, a British University of Nottingham created "an entire replica university, offering *the Nottingham experience* in China and Malaysia with the same system of quality assurance as in the UK" [Adolphus, 2009 b]. To heavily invest in the foreign educational markets a university must be devoted to the idea of internationalization and consequently implement it in practice. Investments in bricks-and-mortar campuses require substantial resources. The numbers of branch campuses established abroad by institutions from the selected countries are presented in Table 8. The US universities established the biggest number of foreign campuses. According to the presented data, they were running 44 transnational branches, including 5 in Qatar, 4 in China, 3 in Canada and 3 in Emirates. The mentioned countries plus Singapore seemed to be the most attractive markets for higher education providers. As many as 14 offshore branches of foreign universities were established in Emirates, 7 in Qatar, 6 in Singapore and 5 in China. [(20, p. 22)] According to Marginson India became recently a target market for numerous foreign universities, even though foreign education institutions are prohibited by law in most of India [(20, p. 21)]. Table 10 includes both campuses owned by the foreign universities and campuses functioning under the franchising agreements. Both of them are subject to local laws concerning registration and quality assurance norms, but in the case of the branches owned by the foreign HEIs relatively stronger quality control measures are implemented by the providers [(20, p. 21)].

Table 10

Branch universities' campuses abroad by provider countries, 2006

Provider country	Number of campuses abroad	Locations of campuses
USA	44	Qatar, China, Canada, Emirates, Jordan, Mexico, Netherlands, Singapore, UK, Czech Rep., Ecuador, France, Germany, Greece, Hungary, Israel, Italy, Jamaica, Japan, Panama, Poland, Puerto Rico, Switzerland, Thailand
Australia	10	Malaysia, Singapore, Canada, Emirates, Fiji, South Africa, Vietnam
India	5	Emirates, Singapore
United Kingdom	4	Emirates, China, Malaysia
Canada	3	Emirates, Qatar
Ireland	2	Malaysia, Pakistan
Netherlands	2	Qatar, South Africa
Pakistan	2	Emirates, Kenya
Philippines	2	Vietnam, Indonesia
Belgium	1	Emirates
Chile	1	Ecuador
France	1	Singapore
Italy	1	Argentina
Korea	1	Vietnam
Sweden	1	Russia

Source: [(20, pp. 25-30)]

Even Pakistan and Philippines had in 2006 two foreign campuses each. The portfolio of 44 American universities' campuses consisted of branches functioning in 24 countries.

Some host countries willing to attract top league universities to establish physical presence on their markets offer the ideal, ready to use infrastructure conditions. This eliminates the burden of investing universities' own money in the campuses. Education City financed by the Qatar Foundation is one of such

projects. There "… students can study medicine at Cornell, international affairs at Georgetown, computer science and business at Carnegie Mellon, fine arts at Virginia Commonwealth, and engineering at Texas A&M"[Adolphus, 2009 b].

Another example of implementing the described concept is a project the final result of which is to be the Songdo Global University Campus. It is being constructed in a new Songdo City on a man-made island, about 50 km from South Korean capital, Soeul. The venue is expected to attract best universities worldwide to set their branches [Adolphus, 2009 a].

Qatar, South Korean and also Chinese giant institutions can be considered born global organizations, dedicated from the start to serve an international audience with the international programmes. But also some smaller universities should be included in this category of HEIs. One of them is IEDC-Bled School of Management in Slovenia with the majority of foreign faculty and foreign students. Another well-established university of this kind is INSEAD operating in France and Singapore.

Some Criticism of Universities Internationalisation

In spite of the obvious benefits of HEIs internationalization, some researchers criticize the process [1]. They point out that, not all the universities can afford new methods of internationalisation, as they are very expensive. Secondly, sharing the faculty between mother institution and foreign campus may cause problems (divided loyalty). Another threat connected with the process is a brain drain of the less developed countries. Many students who travel abroad to study never come back to the country of origin. So the source countries do not increase their human capital. [Adolphus, 2009 b]

Another risk perceived is a result of not properly designed internationalisation is ghettoisation of foreigners. Some universities invite mobile students but do not take the proper care of them, which makes the mentioned danger very real. It is not enough to offer certain programmes; the whole experience should be carefully designed [Adolphus, 2009 b citing [15]. Education is a service and like in the case of all the other services, the quality is perceived not only on the basis of final results (what you get), but also by taking into consideration the attributes of a process (how you get it). There are many instruments aimed at making the foreign student enjoy their studies and letting them feel comfortable in the new environment (international events, competitions, and clubs). Unfortunately, some universities do not bother to use them, lacking understanding that the foreign students should become valuable participants of the student life in class and outside.

The world higher education market has been changing within the last decades, causing the bigger and smaller players to face new challenges. There are more challenges to face in the future in the still changing environment. It may be worthwhile to get to know how these challenges were met by the university systems of selected countries. Australia and Hong-Kong may be interesting example of success stories.

The Case of Australia

In the late eighties of the 20th century international education turned to be a major export industry in Australia attracting students from Asian countries, mainly Hong-Kong, Malaysia and Singapore. In 1987 the government abandoned Higher Education Contribution Scheme, an aid provided earlier to almost all overseas students. That move resulted in a sudden increase in export revenues. At the same time higher education commercialisation threatened the quality of services rendered. In this situation the quantifiable performance indicators were introduced by the federal government to monitor quality maintenance and enhancement. The quality audits examined research, teaching and learning and community service contributions. Bigger governmental funds were then allocated to those HEIs which ranked high in quality rankings. Other universities, especially the newer ones and therefore unable to prove the major advancements to the auditors perceived the funding principles unfair and reinforcing the traditional hierarchy of the system [Mazzarol, Hosie, 1996, pp. 37-50].

Data on the students enrolled by Australian universities in 1993 showed that about half of them chose business administration and economics. Other programmes were much less popular. The most important reasons indicated by the students to choose Western Australia a place to study were its closeness to home (many students had families in Western Australia) and nice climate and weather. Some experts doubted whether Australia could keep its position on the world high education market relying only on climate and lifestyle, and being perceived as the place of "fun". There was no high quality reasoning among the top causes of studying in Australia. "Korean student advisers were …critical of Australia's level of quality, which they viewed as "low to middling"…not better than that available in Korea" [Mazzarol, Hosie, 1996, p. 43].

International Competitiveness Study prepared for the International Development Programme of Australian Universities and Colleges pointed out that hoping to stay an important higher education services exporter Australia could not rely on the fact that it was a more accessible and cheaper destination for some Asian students than the US or Europe. Australia was not considered a centre of excellence in any particular discipline. Therefore it was advised that it should have differentiated its offer, and the Australian universities should have gained the quality reputation, just like the American ones gained reputation of centres of excellence in business studies, computer science and engineering. International Competitiveness Study required "uniformly high standards in education" and at the same time "an increase of international awareness of the country's commitment to it" [Mazzarol, Hosie, 1996, p. 45]. The latter needed a new promotional policy concentrating the efforts on presenting an expertise in selected fields of science. It questioned the beneficial effect of the aggressive promotion of Australian educational institutions abroad, as not based on the market research. As a result "too much emphasis on glossy images and inadequate, unnecessary detail" harmed the image of Australia as educational

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hub. Promotion should have been more informative, increasing the future students awareness of the educational process and results. The Study suggested that the achievements to be promoted would be more convincing if actions were undertaken in strategic alliances with first class partners. It also advised to differentiate ways of serving particular markets pointing out that the Asian market was entirely different from European and American ones [Mazzarol, Hosie, 1996, p. 49].

In short, the Study recommended the market segmentation and quality differentiation as the instruments of increasing the added value perceived by the students and therefore willing to come to study to Australia. (Such strategy would prove also beneficial for other countries intending to enter international higher education market or reposition themselves on it).

Basing on the mentioned Study, the literature review and their own research Mazzarol and Hosie formed some suggestions and observations addressed to higher education policy makers [Mazzarol, Hosie, 1996, pp. 46-48].

- They suggested to undertake an effective marketing activities on behalf of higher education institutions, supported be a reliable and timely research results.
- They found out that private recruitment agents employed in many markets were of little value, just like trade fairs.
- According to them, Australian Education Centers established in key markets did not assure unbiased information to the visiting students. The reason was the remuneration system of the local staff based on a commission.
- They called for strategic coordination of international education marketing.
- They were convinced that higher education internationalisation needed employing the newest technologies which could be cost-effective in the case of distant students and at the same time could ensure control over the service quality, though at a start they required investments in equipment and staff training.
- They added that to be internationally competitive, the higher education needed increased government financing.

The above cited suggestions are usually addressed by experts to all newcomers to the world market. That they must work hard to find themselves on a list considered by the relatively big numbers of mobile students. Cost leadership may not be the strategy promising a success. A diversification strategy is advised to be much better way to reach the ambitious goals. However, its implementation needs meeting some crucial conditions. They include:

- choosing the major disciplines to be promoted internationally (brand positioning)
- proving excellence, not only in teaching but also in finances, administration, governance and leadership
- offering curricula, which prepare the students to work in a globalised environment
- cooperate with global companies in the educational processes. [23]

Moreover, it is widely believed, that to successfully compete on the global higher education market universities should also prove their good research reputation by participating in the major international programmes. These suggestions should be carefully considered by the HEI in Central and Eastern Europe.

As illustrated by the data on top exporters of high education services, Australia managed to not only keep, but also strengthen its very good position on the world market. The country succeeded in building several university discipline groups included in the world top 100 by Shanghai Jiao Tong rankings [(20, p.54)]. The major disciplines in 2008 were: physical sciences, engineering, life sciences, medicine, social sciences. ANU (physical science, life science, social science), University of Melbourne (engineering, life science, medicine), University of Queensland (life science, medicine), University of Western Australia (life science, medicine), University of Sydney (engineering), University of New South Wales (engineering) became the centers of excellence. [(20, p. 63)]. The growth in revenues earned by Australian HEIs in 1995–2006 is presented in Table 11.

Table 11

Annual revenues generated by Australian HEIs from international students' fees between 1995 and 2006 (in $ million)

Year	Revenues	Year	Revenues
1995	441.2	2001	1163.5
1996	531.7	2002	1449.8
1997	627.3	2003	1700.9
1998	701.0	2004	1946.6
1999	791.7	2005	2168.5
2000	947.1	2006	2375.4

Source: [(20, p. 68)]

According to the Review of Australian Higher Education Final Report, "The policy directions in higher education in Australia over the last two decades can be summarized as:
- "increasing the percentage of the population participating in higher education
- increasing the diversity of university income sources, including from international students
- increasing the contribution by students to the costs of their education
- improving productivity and efficiency in higher education
- introducing competitive or performance-based funding; and
- diversifying higher education by government support for private provision." [(8, p.4)]

- In experts' opinion there is much more to do to face a new competition on the world market. Particularly the focus should be on "accreditation, quality assurance, evaluation of standards and use of outcome measures" [(8, pp. xi-xxix)].

The case of Hong Kong (based on [22], pp. 277-304)

Hong-Kong was the first country (region) in East Asia to impose quality monitoring in higher education institutions funded by the government. The measures applied in the nineties of the 20th century included research assessment exercises, teaching and learning process reviews, and management reviews. The first ones were conducted to decide on the research grants value eligible for departments. There were also special funds offered to the institutions intending to build centres of excellence in the fields in which the private sector and public sector organizations were interested. In assessing the teaching and learning performance not only self-monitoring and self-evaluation procedures were practised. The assessment visits were conducted by panels of local and foreign experts. The reviews were also implemented in order to evaluate the effectiveness of management and governance ("development of a strategic plan, resource allocation, implementation of plans, roles, responsibilities and training, service delivery and management information systems"). Hong Kong is a good example of the place where reforms aimed at increasing the international competitiveness of universities were initiated and consequently implemented by the government of special administrative region (HKSAR). The management-oriented reforms were in line with the general phenomenon of altering the philosophy of governing in the public sector. It was believed that higher education required strength and flexibility in the governance and management.

Major changes are usually initiated by leaders. This was also the case of Hong Kong educational system. A new chief executive of HKSAR government, visioning Hong Kong an educational hub of the region started his work from ordering in 2000 a comprehensive review of the local education system with the focus on regional and global trends influencing the sector. The report, published in 2002 suggested that Hong Kong needed urgent actions to provide its inhabitants new opportunities and strengthen its competitive edge. One of major tasks was connected with enhancing international competitiveness in the global marketplace. The sharp quantitative goals were put forward to be reached by 2010. The working groups responsible for dealing with various aspects of a reform were established. In 2003 a new task on the government-funded higher education institutions was imposed. Universities were asked to conduct a self-evaluation with reference to their missions and visions and then to declare their strategic roles in the sector. They were expected to become mission-and-vision clear by identifying their specialisations. They were also supposed to review their governance and management practices and structures and to prove their fitness for purpose. The same year all these institutions were expected to present the 5-year academic development plans. They were to describe the

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planned roles and priorities changes which were to result in the final differentiation. The Differentiation Committee was to estimate which universities' profiles promised the high world class performance and deserved high levels of public and private support. The substantial government funds were to be directed to a small number institutions of strategic international importance. The document published in early 2004 entitled *Hong Kong Higher Education: To Make a Difference. To Move with the Times* underlined the necessity of differentiating the roles of the universities. The idea was to form an integrated system of unique institutions. The same year the new document entitled *Hong Kong Higher Education: Integration Matters* was issued. It suggested that the universities should engage in the various forms of close collaboration, which was expected to increase their strengths against competitors. It was expected that collaboration would include universities in Mainland China and abroad. It suggested that HEIs should start cooperating also with other partners. The report reviewed various forms and models of collaboration, including strategic alliances. To increase the universities' interest in collaboration a Restructuring and Collaboration Fund was made available for 2004/2005. The programme proved effective as many institutions started to explore collaboration opportunities and next they launched numerous programmes with the new partners. To make higher education institutions more entrepreneurial in financing sources diversification, certain measures were undertaken encouraging them to strengthen their relationships with business. For example public-private partnership was supported.

The both cases, of Australia and Hong Kong proved the effectiveness of the well designed and implemented higher education government policy aimed at establishing the world standards and the centres of excellence in the distinguished fields of knowledge. Monitoring performance and motivating the faculty to follow the policies were the right stimuli targeted at enhancing the higher education quality and consequently attracting the international students.

HEIs Internationalization in the Years to Come

The participants of the 2009 World Higher Education Conference in Paris admitted that "Higher education is undergoing transition and rapid change with the 21st century university likely to be a hybrid of public and private enterprise with a fluid global student population."[(18, p. 1)]. The private HEIs account for about 30 percent of enrollment worldwide, while in such Asian countries as Japan, Korea, Philippines and India for around 80 percent [(18, p. 2)]. In Central and Eastern European Countries also many new, private HEIs were established during the last two decades. In Poland for example, the private universities' share reaches 70 percent of the total number of HEIs. In this situation Western Europe is the region relying most heavily on public universities.

The growing numbers of mobile students make this segment very attractive to both well established and new international higher education market providers. Though the biggest growth in demand for higher education is observed in East Asia and

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the Pacific countries, not all the universities worldwide should count on attracting many students from there, as majority of mobile students move within their regions of origin. [(18, p. 2)] According to the same data, the range of destinations is expanding, and the new countries enter the league, causing the leaders to gradually attract fewer foreign students.

Basing on the analysis of long-term demographic, economic and technological trends and forecasts D. P. Snyder suggested that well established American and Western European universities should abandon their old curricula to offer a new education dimension. In his opinion, industrial era universities in the western countries ignore important changes in their environments. The migration of labour-intensive information work from high labour cost countries to low labour cost countries decreases the demand for graduates with traditional skills in the advanced countries. At the same time, educators from the less developed countries imitate industrial era curricula contents and teaching methods to supply the world economy with the workforce skilled to exploit the information technology [(28, pp. 43-61)]. Some experts expect that in the near future the increased levels of education in the developing countries will entirely eliminate the western workforce skills advantage [(7, pp. 49, 47)]. According to Snyder, "educators in the industrialized nations should be developing new curricula in order to prepare their students for a future workplace that has not yet been invented" [(28, p. 44)]. Also Brunstain called the American universities to respond to the changes and redefine the curricula, internationalize campuses and rethink teaching foreign languages [(8, pp. 382-391)]. Stohl noticed however, that the major obstacle for some American universities to internationalise was teachers' lack of interest and commitment to it. So the academic staff engagement in mobility programmes was considered the crucial challenge [(30, pp. 359-372]. Reaching the new segments of foreign and mature adult students would be easier if western universities took fully advantage of distant learning. On the other hand, facing the low-cost competition from the Chinese or Indian institutions which, as previously indicated, currently offer online programmes in many countries addressing the same target markets, is not easy. E-learning can be the major strategic instrument of Central and Eastern European universities' internationalisation, after they carefully determine the regions they want to operate on. At the same time e-learning wide implementation will require solving numerous problems, such as quality assurance, work-load measuring, compensation systems [(21, 2006, pp. 270-282]. Morrison expects that in the future "many colleges and universities will be completely virtual, while residential campuses will offer predominantly hybrid courses: face-to-face classes supplemented by individual and collaborative online projects" [24, p. 9].

Traditional western universities are threatened not only by the competitors from the developing countries, but also by the for-profit institutions functioning on their own markets. The aggressive, low-cost, for-profit schools' positions on the higher education market is rapidly growing. This trend is particularly strong in the USA. The networks of numerous local outlets established by such HEIs offer the students

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affordability and convenience. For example, the University of Phoenix promotes its locations available within 10 miles of 87 millions of Americans. Its portfolio includes many online programmes [University of Phoenix web page].

Higher education traditionalists usually complain that universities are losing their academic qualities and their original purpose. Their opponents argue that the traditional universities are not adjusted to play a required role in the contemporary world. They quote the results of 1500 college seniors and recent graduates from the US, UK, France, Germany and Spain survey conducted by Accenture. It suggested that the final product of the western HEIs fell far below expectations. "24 percent of the respondents felt that they possessed communication skills necessary for the workplace, and only 16 percent were satisfied that they had the right computer or technical skills. Most important of all, only 20 percent of those surveyed felt they had *the ability to produce high quality work* or *a strong knowledge of their field*". The majority of the respondents reported that their current career plans involved *finding an employer with a good training programme*. [Green, 2004 cited by Snyder, 2006, p. 50]. These results are worrying and should not be ignored by the HEIs in the western countries.

D. P. Snyder identified three new dimensions of higher education metamorphosis in the years to come.

1. **A longer education.** The technological progress and environment transformation require an on-going learning to keep jobs of all kinds. "By 2015, most post-secondary institutions will no longer be primarily engaged in front-loading a lifetime's knowledge on students in their 20's. Instead, they will be engaged in a life-time of mutual learning by both their faculty and their students" [(27, p. 1-4)], cited by [(28, p. 54)]. Higher education will be offered to students in various age groups.

2. **A fuller education.** Solving various social and corporate problems requires knowledge from various fields "... giving rise to a rapidly growing demand for people with combinations of skills…" It is expected that the boundaries between the traditional scholarly disciplines will disappear. In this situation, universities should work hard to compete on offering a trans-disciplinary degree programmes. At the same time the scholars should create new disciplines and constantly enrich the existing ones thanks to their discoveries [(28, p. 55)].

3. **A further education.** D. P. Snyder expects a major change in a doctoral education and the process of earning PhD's. He suggests that in the coming information era the candidates will be "posting and defending a Web log (blog) to the general community of peer scholars…" [(28, p. 55)]. Then a few months' "record of such a *dialogue* would be subject to review and critique by a university-endorsed panel of *fair witnesses* who would attest to the rigor of the discourse and the evolution of the original hypothesis" [(28, p. 55)]. More and more doctoral candidates will propose trans-disciplinary hypotheses. Additionally, dissertations will have to be updated every 10 years in order to keep the degree current. Also PhD's earning process will be open to non-academic candidates, who can meet the described standards without

attending any formal education. The described changes will support the idea of open knowledge policies, and open-market innovations.

Conclusion

The transition of higher education is a worldwide phenomenon. It is supported by rapid demographic changes as well as technological achievements in communication. The fluid global population of students has never been as numerous as it is now. The majority of universities see this market potential and try to start or to continue the process of internationalization. There is no one way which fits all, therefore HEIs choose various instruments to internationalise. Also the legal framework for HEIs may vary from country to country. There are many lessons to be learned for decision makers at the government level and at the universities' level basing on the current trends, the experiences and performance of higher education systems and organizations in various countries. Copying other countries' systems and other universities' measures and fully implementing them in a different environment may prove ineffective and inefficient. Monitoring the environment, analysing the benchmarks, understanding trends and challenges and then determining the unique strategy is the best method of reaching the goals on every market, including an international higher education one.

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