External Education Policies and Tools

Developments, trends and opportunities in the internationalisation of education in the EU and its Member States

European Commission
Education and Culture

Policy brief based on the mapping study Mapping Member States' external Education & Training policies and tools (2010)

The contents of this publication do not necessarily reflect the position or opinion of the European Commission.

Contents

Introduction

While the European Commission has been heavily involved in the development of intra-EU internationalisation in education and in supporting education in countries surrounding the EU, including those that would become future Member States, its involvement in the globalisation of European education has so far been less prominent. Out of its growing interest in cooperation with countries outside the EU has grown the desire to inform the possible preparation of an external education policy by producing a mapping and summary overview of existing cooperation policies, structures and tools in the Member States and a selection of non-EU countries.

This mapping study, commissioned by the Directorate-General for Education and Culture (DG-EAC), was completed in 2010. It examined the external education policies, instruments and tools in the countries concerned, with particular attention to policies towards the EU candidate countries, the European Neighbourhood Policy (ENP) countries, emerging countries such as Brazil, Russia, India, China, South Africa, Mexico and Argentina, and industrialised countries including Canada, Japan, New Zealand, South Korea, Switzerland and the United States of America (USA).

The study identified 625 instruments: 487 in EU/EEA countries and 138 in Australia, Canada, Japan and the USA.

This policy brief is based on the results of this mapping study, brought up to date with the most recent developments. It offers both a summary of its results and conclusions drawn on the basis of these.

As an introduction, it is important to note that this study was a first mapping exercise, which provided a very first snapshot of national instruments and policies and which may not have identified all relevant instruments in each country. This was recognised as a shortcoming from the outset.

The study has therefore followed up by developing an online database on higher education external cooperation. This database contains introductory chapters on national policies aimed at supporting external cooperation in the field of higher education, a searchable database of national initiatives in EU/EEA countries and an extensive set of links to further reading on this topic. While still not entirely comprehensive, this database is much more detailed and up to date than the collected feedback from the original mapping study.

Finally, as there is much confusion on data and terminology in internationalisation statistics and references, this policy brief follows the UNESCO/OECD definitions: foreign students are students who hold a different passport than that of their host country (but may be long-term residents); and international students are ‘students who have crossed a national or territorial border for the purposes of education and are now enrolled outside their country of origin’.

Executive summary

Over the past 30 years internationalisation in education has evolved at a pace that no one had envisaged just half a century ago. Students study abroad in ever greater numbers, the world of learning recruits its students from ever greater distances, and adding an international dimension to education has moved from being the niche business of understaffed international offices to being fully mainstreamed in education strategies and policies.

This is not a short-lived trend. Internationalisation has accelerated even further in the past decade. In 2008 an estimated 3.3 million tertiary students were enrolled outside their country of citizenship. This represents an 8.4% increase compared to the year before. Between 2000 and 2008 the number of foreign tertiary students enrolled worldwide increased by 85%.

Up until the 1980s most international activities had a cooperative nature, be it as cultural exchanges, joint research or development cooperation. Often these followed geographical lines that were historically defined. Recently, particularly in higher education, international activities have increasingly taken on a more competitive character as universities vie for students and staff, seeking extra income and status across the borders of their constituencies and countries. Public authorities often support them in this task.

Drivers

(Section 2)

The internationalisation of education is propelled by six main drivers:

- development cooperation;
- the promotion of country and culture;
- political strategy;
- money;
- a desire to improve the home education system;
- human capital development.

Strategies

(Section 3)

While not all countries covered by the mapping study have clear policies on international cooperation in education, those that do employ a wide variety of strategies. The study divides these into three broad groups:

- countries that follow **a coordinated or integrated strategy** involving multiple sectors of society;

- countries that pursue **separate but linked policies**;
- countries that follow **individual policies**, specifically targeting the internationalisation of education.

Activities

(Section 4)

The study distinguishes between six fields of activity. These are: academic cooperation, capacity building, information and promotion, language teaching, mobility and policy dialogue. When looking at the six main fields of activity spread across the 487 identified instruments in the EU and EEA countries, the vast majority of instruments (74%) relate to mobility programmes. Other types of cooperation follow at quite some distance, with 40% of the instruments including academic and institutional cooperation, 30% addressing language teaching, 29% including an element of capacity building, 28% covering information and promotion, and 23% covering policy dialogue.

ISCED[1] levels 5 and 6 are targeted by 68% of the instruments. This is reflected in all types of activity, except in capacity building, where there is a higher proportion of other levels of education.

The 138 instruments identified in Australia, Canada, Japan and the USA have a similar focus on mobility, with Australia having the highest proportion (76%). Incoming students are also the primary target group, except in Canada, where programmes for outgoing students prevail.

While the international dimension in education is best developed in higher education, general education support relating to development cooperation has received a considerable boost from the Millennium Development Goals. These have affected national strategies and the way in which countries allocate financial resources to the instruments they implement.

Outlook and trends

(Sections 5 and 6)

Although for different reasons, universities share a common objective – that of attracting the best brains – with the private sector and policymakers in their home countries, and this alone provides ample reason to assume that the internationalisation of higher education in particular is a process that has not yet peaked.

Current growth areas include marketing and promotion (with the potential of the world wide web better exploited, and countries branding their entire education systems), the development of joint and double degrees, the development of transnational education (for example, through Erasmus Mundus), and the development of overseas and virtual campuses.

EU intervention in the promotion of an international dimension in education can be tremendously powerful, but must be carefully planned so as not to intrude in, or conflict with, national interests. The main focus of any new EU-level initiatives should therefore be on areas that provide a strong added value to individual Member States' own international cooperation initiatives and policies.

These can include the following:

[1] ISCED refers to UNESCO's classification of education levels, where 5 and 6 cover tertiary education. See www.unesco.org

- areas in which Member States are not in direct competition, but rather pursue common goals and interests;
- areas in which a high proportion of Member States do not already have highly developed internationalisation strategies and/or instruments;
- areas in which current EU policy provides for a strong rationale and mandate;
- areas in which the EU could provide specific support to certain groups of Member States;
- areas in which gaps or specific needs are emerging.

1. A brief historical perspective

The foundations

In the *Treaty of Rome* of 1957, education was one of the most significant absentees. Seen from a current perspective, this may seem odd, as today education is viewed as one of the cornerstones of economic development. But in the strongly patriot years that followed World War II, education was sharply defended as a national affair, and one in which no international meddling would be allowed to erode national cultures and languages.

European education systems remained the colourful patchwork of 'best systems in the world' during a time in history when globalisation was gathering pace and international links were forged along the lines of colonial heritage, new trade routes, military and ideological spheres of influence and a rapidly advancing world of science. Outside the Eastern Bloc and below the highest academic levels, international cooperation in education developed largely as bilateral (often cultural) exchange initiatives that took a number of forms that easily matched the variety of national education systems.

The second half of the 1980s brought a change of climate that was favourable to bringing the European Community closer to its citizens. This allowed the first Community actions to take off. During the same period the Eastern Bloc began to crumble. EU countries were forced to take a position on the future of the eastern neighbours with whom they shared a continent, and they did so eagerly. While the Tempus programme was conceived and launched at a speed that had not been witnessed previously, bilateral initiatives in support of Hungary and Poland in particular sprung up even faster.

The Tempus programme in its 20 years of existence went on to reach out well beyond Europe, and the Erasmus programme, which was originally a strictly European affair, would eventually extend to a global audience when the time was ripe for such a global outreach.

Recent developments

▶ EU-supported activity

With its focus on the development of a knowledge economy, the Lisbon Treaty of 2000 placed education centre stage in further European development and gave international cooperation in education another massive impetus, while at the same time opening the way for an increased mandate for the European Commission in this field.

The Commission's Education and Training 2010 Work Programme of 2002[2] specified increased mobility and the strengthening of European cooperation among its objectives.

[2] Detailed work programme on the follow-up of the objectives of education and training systems in Europe.

In recent years the European Commission has developed a series of initiatives aimed at improving cooperation in the field of education and training with countries outside the EU. These include:

- the Tempus programme for cooperation among the Western Balkans, Eastern Europe and Central Asia, North Africa and Middle Eastern countries in the area of higher education;
- the AlBan and ALFA programmes to reinforce cooperation in higher education among EU and Latin American countries;
- the Asia Link and the ASEAN-EU University Network Programme to promote cooperation between higher education institutions in Europe and South East Asia;
- Edulink, which aims to foster capacity building and regional integration in the field of higher education among EU countries and countries in Africa, the Caribbean and the Pacific;
- the Erasmus Mundus programme, which promotes cooperation and mobility with non-EU countries in particular, supporting top-quality master's and doctoral programmes as well as the mobility of students and higher education staff within Europe and mobility towards and from non-EU countries.

In addition, in 1995 the first formal agreements were signed with the USA and Canada, stressing the need for balanced cooperation in higher education and vocational training. These were renewed in 2006, providing a legal framework up to 2013. The renewal brought a substantial increase in funds to consolidate and expand transatlantic education cooperation. Other initiatives address cooperation with other industrialised countries, notably Australia, Japan, New Zealand and South Korea. Their main activities include joint and double degree projects, joint mobility projects and policy-oriented dialogue, as well as projects to address strategic issues relating to education and training systems and policies of the EU and its partner countries. Specific programmes linked to these agreements include:

- the Atlantis programme for EU–US cooperation in higher education and vocational education and training (VET);
- the EU–Canada programme for higher education, training and youth;
- the EU–Japan pilot cooperation in higher education;
- the EU–Australia cooperation in higher education and VET;
- the EU–New Zealand pilot cooperation in higher education.

Other bilateral and multilateral activities

Broader cooperation outside the direct sphere of influence of the European institutions also began to yield important results. Multilateral initiatives led to great strides being made in areas that had previously been considered sensitive, such as the evaluation of diplomas and degrees and the development of indicators. The Bologna Process, the initiative for which came entirely from individual Member States, became a globally unprecedented drive towards the development of an international platform for higher education. The 'rolling agenda' reflected the desire for greater continuity. The ingenuities of subsidiarity and the open method of coordination offered a way around prickly issues and were applied in this field well before the terms were coined and became common practice.

In VET, where legal wrangling had always been less of an issue because the Treaty of Rome had referred to it specifically, the Copenhagen Process (2002) led to the creation of the ambitious European Qualifications Framework, which shone as an example of a balance between the common

European needs and the sovereignty of each country, and which has gradually also become a model for cooperation with and among countries outside the EU.

From the very same developments that have driven European cooperation, namely globalisation and the needs of a knowledge society, a new form of internal and international competition has grown. In very recent years a battle for brains has realigned the focus of many national initiatives towards attracting high-potential students. Faced with national competition as a consequence of dwindling funds, widespread decentralisation, and a liberalisation of the right to provide higher education, individual universities have also started looking abroad, both for faculty and for students.

As a result, there now co-exist a myriad of policies, strategies, tools and instruments in the field of international education. It is the diversity among these and how this diversity can be best capitalised on within a European framework that was the subject of the DG-EAC study *Mapping Member States' External Education Policies and Tools* and its follow-up actions, which in turn led to the formulation of this paper.

2. Reasons for looking abroad

Countries and individual universities have a wide variety of reasons for engaging in international cooperation. Many initiatives co-exist, sometimes in unison and defined in complex policies, at other times as a loose collection of programmes and projects. In order to formulate rational policies for individual states and meaningful proposals for European intervention in this field, it is important to know the different factors that drive cooperation in individual Member States, to look at current initiatives and to analyse trends and the expected lines of development.

Sections 3, 4 and 5 attempt to do this. The current section starts with a discussion of the drivers of cooperation, taking the mapping study as a starting point. While these drivers are dealt with separately here for the sake of clarity, in practice they often appear in a variety of combinations that differ from country to country.

Strategic drivers

Development cooperation

When looking at differences between EU and EEA countries in terms of target regions for their internationalisation efforts, one key driving factor that emerged was the historical ties and traditional cooperation patterns that date back to colonial times and that have evolved into communities such as the Commonwealth and Francophonie.

France focuses on the primary education systems in sub-Saharan Africa (including Senegal, Burkina Faso, Mali and Madagascar).

***Portugal** seeks to assist its ex-colonies in improving primary and secondary education.*

Generally, countries with a strong focus on development aid also aim to encourage general political and systemic improvements in the countries with which they cooperate. Germany's foreign and cultural policy emphasises the need to intensify cooperation with developing countries in order to stimulate their growth and to reduce poverty. Denmark's support to education in its partner countries addresses all levels of education, from early childhood care and development to tertiary education.

Several countries place particular emphasis on developing academic capacity in non-EU countries. In Norway, for example, international cooperation in higher education has for a long time played a key role in international development policy. Overall, such cooperation mainly consists of capacity building through networking, partnerships and other forms of institutional exchanges and learning. Spain's development policy also directly refers to improving higher education systems in non-EU countries.

The promotion of country and culture

A number of countries have significant communities abroad. In the early 20th century Italy and Ireland experienced high levels of emigration for economic reasons. In Poland it is said that the second largest Polish city is Chicago. Other countries, such as Romania, Hungary, Slovakia, Greece and Cyprus, witnessed similar outflows of their national population in search of a better future. International cooperation in education and training is used by several of these countries as a means of reaching out to their diasporas and ensuring that first-generation and subsequent migrants maintain an awareness of their origins, sometimes with the explicit aim of attracting them back to their country of origin.

Elsewhere, attracting international students has an added missionary rationale in which promoting the culture and language of the country plays an important role. While education ministries are often involved in these promotional activities, such measures may also be linked to encouraging tourism; as will be seen later when discussing students, this can make sense.

Political strategy

In some countries the choice of target countries for development-driven cooperation depends largely on the perceived development potential of these countries and the chances that investments will actually make a change. In other countries there is a clearer link between general foreign economic or strategic policy and diplomacy.

Many European countries also primarily target countries that are prioritised for strategic and political reasons. The Nordic and Baltic countries, for example, are rapidly expanding their activities in Russia, while Greece and Austria are working intensively in the young Balkan republics. Emerging countries are the focus of many of the instruments identified. In terms of numbers of instruments, the countries most targeted were Russia (114) and China (106). Other countries covered by 60 or more different instruments included Egypt, Morocco, India, Vietnam, Albania, Croatia, the former Yugoslav Republic of Macedonia, Moldova, Serbia, Turkey, Ukraine, Canada, Mexico, the USA, Argentina and Brazil.

*In the **USA**, USAID runs a range of education programmes covering basic and higher education and workforce development in developing countries. Its activities have an overarching foreign policy goal of advancing US national security, foreign policy and the 'War on Terror', by addressing poverty that is fuelled by a lack of economic opportunity.*

Most of these instruments are naturally targeted at regions of particular relevance to US foreign policy, such as the Middle East, Central and South Asia, and the Balkans, and cover a whole range of educational topics and sectors.

Strategic reasons often include the strengthening of ties between neighbouring countries. Much of this type of cooperation is orchestrated by the EU, but individual groups of countries have also developed their own networks within and beyond the EU. For decades now the Nordic countries have operated their Nordplus scheme and employed their own multilateral agreements on the free mobility of students. In the years leading up to the enlargement of the EU in 2004 they focused much of their support on the Baltic countries. Countries in southern Europe are strengthening their links with nations across the Mediterranean Basin. Many East Asian countries also prioritise cooperation with their immediate neighbours.

Money

There are a few European countries for which international students constitute an important source of income. The United Kingdom (UK) is a classic example. This objective is more difficult to pursue in countries where education is free and open to all, or is subject to much lower fixed tuition fees, typically to promote access for disadvantaged groups. However, in many of these countries international sales, particularly of postgraduate programmes, are being increasingly liberalised. Many of the smaller countries offer a wide variety of programmes taught in English. The Netherlands and Denmark have in recent years allowed substantial tuition fees to be charged to students from outside the EU; even Sweden, one of the last EU countries in which, until recently, all education was free for all regardless of nationality, has now introduced tuition fees for non-EU international students. But charging tuition fees alone is no proof that a country pursues monetary gains. Some countries may originally have subsidised foreign students and are now moving towards a situation where foreign students are self-financing.

*The **United Kingdom** is the leading destination for international students in Europe and ranks second in the world. International students generate billions of pounds for universities each year and spend multiples of that on housing, food and clothing in the country. Education is thus an important export product, and substantial promotion and marketing activities are key elements of the overall strategy to promote education in the UK.*

Universities in Australia, Canada and the USA also earn significant proportions of their budgets from incoming international students. The education and training industry is now Australia's largest export service and third-largest export earner. Fee income from international students accounted for 15% of total revenue for the sector as a whole in 2004. The government has put a great deal of effort into monitoring this export, facilitating incoming and outgoing flows of students, and improving the conditions for Australian education abroad. Visa regulations were relaxed in 2008, and information and promotion activities are also a prominent feature of the government's strategy.

In Canada international students provide an important source of income for national universities, where the fees charged to international students are not only higher than those charged to national students, but also relatively high in comparison with other OECD countries.

A desire to improve the home education system

Since the numbers of incoming students have dwindled in recent years, the USA has been trying to firm up its leading role in science and technology by reinvigorating its efforts to attract the best students from abroad. Other countries use international cooperation as a development tool for their own education system too, adding an element of capacity building and making the necessary improvements, for example to the curriculum offered.

Malta is working on the benchmarking of educational provision to ensure that this is in line with, or exceeds, international standards. Spain also wants to modernise its higher education system by making it more international, thus attracting knowledge, creativity and innovation.

In Norway internationalisation was one of the key elements of the 2003 Quality Reform, encompassing even the management and administration functions. Scandinavian countries have also led the way in attracting temporary foreign teaching staff. Ironically, this has grown out of a tradition where money was rarely a limiting factor, and has become a very rational

way of developing an international outlook among students. In Sweden, attracting foreign faculty is standard practice; it has tremendous potential.

Human capital development

Another important objective for many countries is the broader need to enhance their skills and knowledge base.

One strategy targets national students, with the most talented of these being encouraged to study at high-profile universities abroad. This practice is most prolific in small countries that may not be able to provide a comprehensive and competitive offer to their students. Slovenia, for example, awards scholarships to students with high grades to enable them to enrol in courses abroad that are not provided in the country itself. This adds value both to the students' personal development and to the Slovenian labour market. Mobility programmes in Slovakia also focus on sending students and researchers abroad to improve their employability and career development prospects. In Liechtenstein nearly all individuals wishing to attend university will have to enrol in programmes in neighbouring countries.

Moreover, larger countries also apply these principles successfully. Norway is a large country with a low population density. This makes the establishment of certain equipment-intensive study centres (such as those required for medicine and veterinary sciences) a challenge that is better addressed by fully funding the training of students abroad, rather than extending capacity at home. Strictly speaking such cooperation is economically driven, though with a clear view to improving education opportunities for home students.

A completely opposite strategy that is gaining widespread currency is that of attracting international students with a view to supplementing skills and competences that are in short supply in the home country.

In European countries there is also an increased focus on ensuring that the educational offer provided to home and international students matches the current demands for skills. In the UK the Prime Minister's Initiative of 1999[3] already contained strong elements of this, and these were only strengthened in its second phase. Denmark also seeks to attract first-class international students and academic staff, hoping that they will settle in the country for a longer period of time, also after their studies. In Belgium the Walloon region promotes cooperation and mobility of students within fields that relate to the competitiveness clusters identified by the Marshall Plan (e.g. agro-industry).

*In **Canada** there is a shortage of technical and higher skills. The main priority is to attract more international students, and to retain these highly educated students who have been trained in Canada, in order to respond to Canada's labour market needs. In 2008 the government introduced changes to work permits for international students, making Canada more attractive for skilled individuals. Alleviating skills shortages is also a priority in Australia.*

[3] In 1999 the UK Prime Minister announced a new initiative (PMI) to increase the number of international students choosing to study in the UK. The initiative covered targeted marketing activities (including the EducationUK website), increased support for scholarships offered by the Foreign and Commonwealth Office (Chevening Scholarships), and measures to improve the operation of visa and entry requirements and to ease restrictions on work while in the UK. The strategy successfully achieved its targets to recruit 75 000 additional international students between 2001 and 2005. It is estimated that the PMI has brought an additional £1 billion revenue to the UK.

Student-driven mobility?

What about students themselves? After all, they play a quite significant role in international education.

Since the current study focuses on policies and instruments, it ignores the fact that much student mobility today takes place outside the framework of support programmes. In technical discussions on drivers affecting international education, such as the OECD's widely quoted and influential *Education at a Glance,* there is a tendency towards an excessive focus on what is measurable. This is unhelpful. Students have an increased international perspective and many actually *want* to study abroad.

The classic image of a student who chooses a destination because it offers him or her a better future is incomplete at best, and is often outdated. Between 1998 and 2003 polls by journalists from the Scandinavian magazine *Study Abroad* consistently found that for the sizeable cohorts of Norwegian students who studied abroad on state support, climate and lifestyle were the top factors when deciding on a final destination. The main reasons for studying abroad in general were the opportunities to live in a different culture and meet new people. This explains the huge popularity enjoyed by Australia. Nordic student numbers in New Zealand, which at one point branded itself in the country as 'Norway with a better climate', doubled in five consecutive years. In the same years Spain was one of the top destinations for Swedish students, who were much less generously supported. Both examples also suggest that a trigger as mundane as flock behaviour is also important, particularly in undergraduate higher education.

Such arguments may not apply to Chinese students, although for them too, London undoubtedly has a different ring to it than Lund, and for them too, cities with a large Chinese community may offer a lower threshold.

3. Priorities and policies

While not all countries covered by the mapping study have clear policies on international cooperation in education, those that do employ a wide variety of strategies. The study divides these into three broad groups. These are briefly discussed below.

A coordinated or integrated strategy towards external cooperation that encompasses the field of education.	**Separate but linked policies in relation to external cooperation in education and linked policy areas, such as development.**	**Individual policies in relation to external cooperation in education and training that are not necessarily linked to general external cooperation policies**.
(E.g. France, Germany, Norway, Poland, Portugal and the UK)	(E.g. Spain, Denmark and Estonia)	(E.g. Sweden, Finland and Italy)

A coordinated or integrated strategy

Only a few countries have adopted a strategy that combines more than one policy area (France, Germany, Norway, Poland, Portugal and the UK). In most cases this includes international education and training and development policy.

Portugal has adopted an integrated framework, with international cooperation in education and training forming part of the country's overall external cooperation policy. The main ministry responsible for cooperation is the Ministry of Foreign Affairs. There is a second level of responsibility consisting of the Ministry of Education and the Ministry of Science, Technology and Higher Education, while the Ministry of Labour and Social Solidarity is at the third level.

France's education cooperation strategy is part of an inter-ministerial process involving the foreign affairs, education, agriculture and immigration authorities. Through this process the various stakeholders involved coordinate French initiatives, ensuring that France's

*In the **UK** the Prime Minister's Initiative shows a high degree of integration and centralisation, as it addresses all relevant government departments. The focus of the strategy is mainly on confirming the country's position as a leader in the education market and on sustaining managed growth of UK international education, delivered both in-country and overseas. In this sense it is linked more closely to economic policy than to development. At the same time the Department for International Development also pursues international cooperation with developing countries, in the context of their commitment to the Millennium Development Goals, in particular the goal of achieving universal primary education.*

offer is in line with the needs expressed by foreign partners.

The Foreign Cultural Policy of **Germany** focuses on the promotion of German interests in terms of cultural and educational policy, the communication of a contemporary image of Germany, dialogue and the prevention of conflict, and the promotion of the European integration process. Specific attention is also given to the prevention of 'brain drain' from both non-EU countries and Germany itself, for example to the USA.

In **Poland** an integrated framework in the area of education and science is based on a policy document shared by the Ministry of National Education and the Ministry of Science and Higher Education. The document refers to links with several other ministries.

In **Australia**, although states and territories are responsible for education, the federal government plays a leading role in policy development, particularly international education policy development.

Finally, **Japan**, with its highly centralised system, has a clearly integrated policy, led by the education ministry. This policy is implemented in close cooperation with other key ministries, such as those for foreign affairs and for information and communication. In January 2008 the Prime Minister of Japan announced an ambitious strategy to increase the numbers of international students studying in Japan in future years. The target of this plan is to attract 300 000 international students to Japan each year.

Separate but linked policies

A number of countries have adopted separate but clearly defined policies focusing on international cooperation in education and on the role of education and training in development aid.

Spain, for example, has a specific *University Strategy 2015*, which focuses on the modernisation of its universities through internationalisation. At the same time the country's *Master Plan for Spanish Cooperation*, which focuses on development aid, has allocated some 20% of its substantial budget to basic social services, including education.

In **Denmark** the government's policy for enhanced internationalisation of education focuses primarily on vocational and higher education, supporting mobility and aiming to attract not only qualified students, researchers and teachers but also highly skilled workers in general. The latter is indeed a global priority and is linked to the country's overall strategy to increase its competitiveness. The Danish development policy also supports education at all levels, from early childhood care and development to tertiary education.

Estonia has also developed clear policies in the area of education and development aid. It is interesting to note that most instruments are implemented jointly by the education and foreign affairs ministries, or envisage an important role for the education ministry in development cooperation.

Individual policies

Several countries have elaborate policies outlining their objectives and actions specifically in relation to external cooperation in education and training.

Sweden's national strategy for internationalisation in higher education reflects its desire to increase the competitiveness of Swedish industry abroad and to promote active solidarity with cultures and countries in the non-industrialised world.

In **Italy** the education authorities have developed a political approach that prioritises cooperation with Mediterranean countries in order to build a Euro-Mediterranean Area of Higher Education and Research. The foreign affairs ministry, on the other hand, promotes the education of foreign citizens coming from developing countries and development aid in general.

In **Finland** the government's *Development Plan for Education and Research* (2007–2012) identifies the internationalisation of education and international research cooperation as key factors for success in global competition.

A national or federal approach

Most external cooperation that is not instigated by individual training institutions is developed, led and coordinated nationally. The only exceptions in the EU and EEA are Belgium, Germany, Italy and Spain.

In **Germany** responsibilities for education and culture are decentralised to the *Länder*, but the federal government is responsible for foreign affairs and thus for cultivating international relations in the field of education and training. The *Länder* are represented in the Standing Conference of the Ministers of Education and Cultural Affairs, a consultative forum in which they can provide joint opinions, statements and positions. It reality the role of the federal authorities is limited to establishing the overall strategic direction of international cooperation in education and training, leaving the implementation to the *Länder*, with a great deal of guidance and support from the non-governmental (but operating nation-wide) DAAD.

In **Italy** the national authorities define the general principles and minimum standards for education. The regions are responsible for putting these principles into practice. In international cooperation the majority of instruments identified in the study are led and managed nationally, though some 20% fall under the responsibility of regional authorities. In addition, national-level instruments often involve regional bodies, such as the regional school offices, particularly in providing support to international students during their stay in Italy.

Education and training in **Belgium** falls under the responsibility of the Flemish- and French-speaking communities. The federal authorities coordinate development aid. The two regional approaches are markedly different, with the French-speaking community focusing mainly on francophone countries and the Flemish-speaking community concentrating on some of the countries of origin of its migrant population.

Spain also has a decentralised administration system, with responsibilities for education shared between the state and 17 autonomous communities. These communities are quite active in international cooperation in education and training, both financing and directly implementing programmes.

Education in **Canada** is the responsibility of each province and territory. There is no federal department of education and no integrated national system of education. Universities also depend on the provinces for their funding. Some provinces are very active in the field of international

cooperation in education. Quebec, for instance, implements numerous programmes with French-speaking countries.

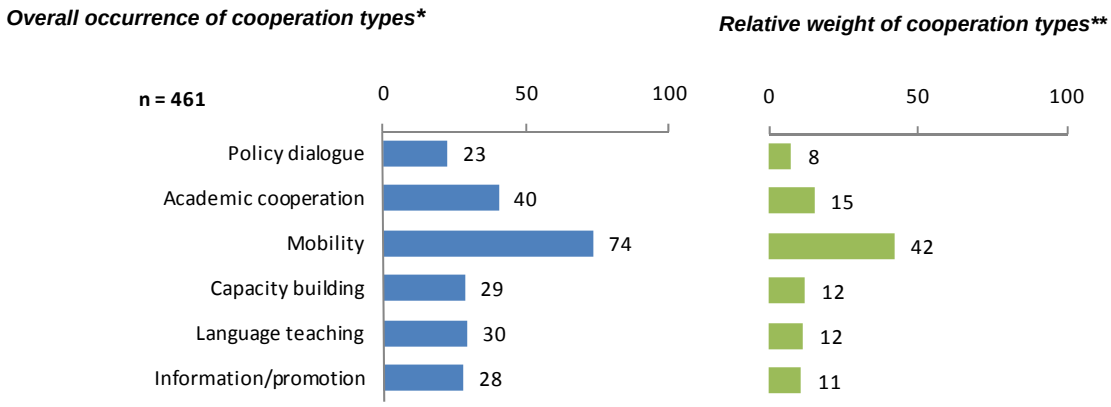
The **US** education and governance systems are also highly decentralised. Local initiatives can be composed of intertwined elements of several federal, state and local programmes. In addition, given the structure of the higher education sector, many universities, community colleges and other post-secondary education institutions have their own programmes and contacts for reaching out to international students and for sending their own students abroad.

4. Activities

EU and EEA countries

The study distinguishes between six fields of activity. These are: academic cooperation, capacity building, information and promotion, language teaching, mobility and policy dialogue.

Figure 4.1 Main types of cooperation (EU and EEA) [4]



** Proportion of instruments that address individual cooperation types (figures add up to more than 100% where multi-cooperation instruments exist in the country)*

*** Proportionate share of multi-cooperation instruments attributed to individual cooperation types they cover (figures add up to 100%)*

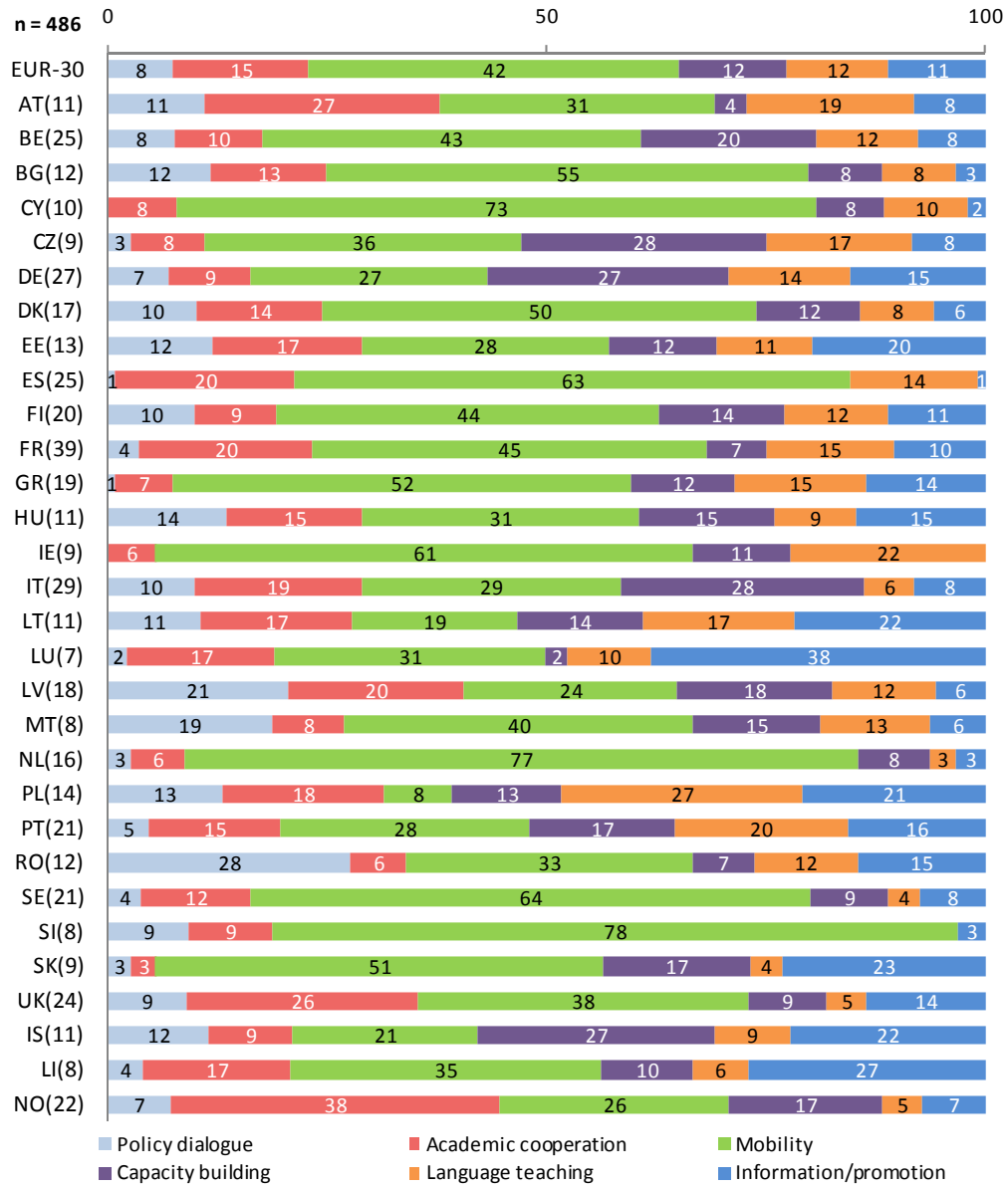
While most of these fields are fairly self-explanatory, 'information and promotion' is anomalous as it concerns not so much direct cooperation or support but rather support measures such as the development of websites, presence at education fairs, online courses and programme databases.

When looking at the six main fields of activity spread across the 487 identified instruments in the EU and EEA countries as presented in Figure 4.1, the vast majority of instruments (74%) relate to mobility programmes. Other types of cooperation follow at quite some distance, with 40% of the instruments including academic and institutional cooperation, 30% addressing language teaching, 29% including an element of capacity building, 28% covering information and promotion, and 23% covering policy dialogue.

[4] In the graph on the left-hand side (overall occurrence), an instrument covering several types of cooperation is counted as one instrument for *each* type of cooperation. Therefore it is counted several times ('duplication effect'). An instrument covering three types of cooperation will have been counted three times. On the right-hand side (relative weight), such an instrument is only counted once (its weight being 0.33 for each type of cooperation covered, regardless of its prominence in the overall project), to avoid the duplication effect.

Figure 4.2 below presents the main types of cooperation by EU and EEA country. The numbers in brackets represent the total number of instruments identified in each country. The numbers in the coloured blocks on the chart represent the relative weight of each type of cooperation in these instruments.

Figure 4.2 Main types of cooperation in each country



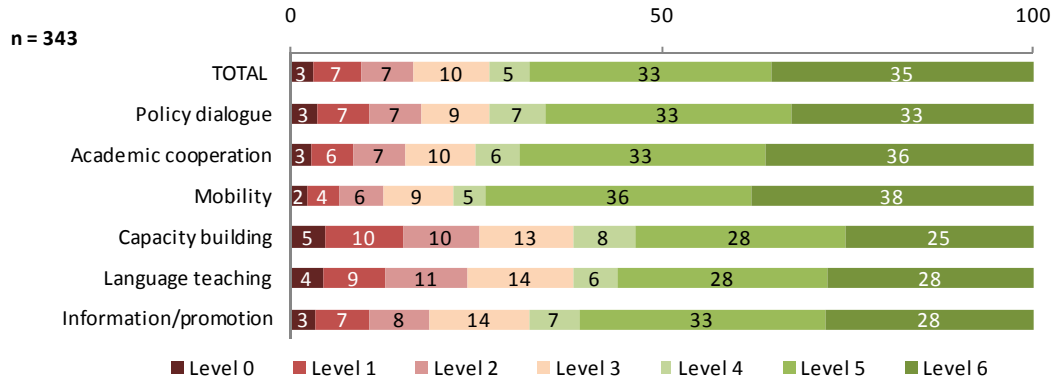
Levels of education

In terms of the levels of education targeted in the beneficiary country (or countries), ISCED levels 5 and 6 together account for 68% of the instruments, as can be seen in Figure 4.3. This general

distribution is reflected in all types of activity, except in capacity-building programmes, in which there is a somewhat higher proportion of other levels of education.

Although most countries showed similar distributions, countries that went against this trend include the UK (with a much more even spread across the different education levels), Austria (where lower levels were also targeted, particularly in language teaching and capacity building), Denmark (with many instruments also addressing ISCED levels 3 and 4) and Cyprus (with a fair share of instruments also addressing levels 0 and 1).

Figure 4.3 Level of education by type of cooperation in non-EU countries



Comparative analysis with Australia, Canada, Japan and the USA

A similar picture emerges when the EU and EEA countries are compared with Australia, Canada, Japan and USA. The 138 instruments identified here had a similar focus on mobility, with Australia having the highest proportion of mobility instruments (76%). Incoming students are also the main target group (particularly in Japan, where 76% of instruments target international students), except in Canada, where programmes for outgoing students prevail.

The patterns observed for institutional cooperation were also similar, with joint programmes and the development of partnerships the most frequent types of activity. In Japan the priority is clearly on promoting networks in East Asia, while quality assurance and the recognition of qualifications, courses and diplomas play an important role in Australia.

Capacity building was the second most important activity in Canada and the USA. The overall objectives in capacity building were quite similar to the ones identified in EU and EEA countries, not least because of the adoption of the Millennium Development Goals. As in Europe, these instruments were often part of wider development cooperation policies managed by the key development agencies.

A notable difference between the two groups of countries concerns language teaching. This appeared less prominently among the four non-European countries, three of which are

predominantly anglophone, whereas it was a very important aspect of external cooperation outside the anglophone countries, such as in France, Germany, Poland and Portugal.

In terms of geographical coverage, Asia was the main region targeted, except in Canada, where North America was the preferred region. Europe as a whole was the second most important target for Australia, Japan and the USA. Interestingly, however, in Japan the EU is more important, while in the USA, Europe outside the EU comes fourth *after* North America, and *before* the EU. In Canada, Europe outside and Europe inside the EU are the last two regions targeted.

5. Future outlook and trends

As global competition increases and most OECD countries can no longer compete on the price of labour, high-level R&D and innovation become their most obvious export areas. This requires brains, and as long as developed countries have an economic edge they will use financial leverage to attract students from abroad.

At the same time almost all universities in these countries suffer from the consequences of decades of expansion in higher education. Public funds are dwindling, but in many countries the level of fees for home students is still set by national authorities in order to keep higher education accessible to all. Fees for international students, on the other hand, are often not regulated, and therefore represent a welcome source of extra revenue that is eagerly exploited.

Universities thus increasingly compete in an international arena. They will more actively seek to recruit high-level staff to profile themselves in an environment where international rankings are standard benchmarking tools.

Finally, globalisation affects the recruitment needs and policies of a private sector that increasingly operates internationally, whose need for multicultural skills and polyglots is unlikely to diminish in the near future.

Hence, although their motivations may be slightly different, universities share a common objective with the private sector and policymakers in their home countries: they all want to attract the best brains. This alone provides ample reason to assume that the internationalisation of higher education in particular is a process that has not yet peaked.

Ambiguous data and definitions

International mobility statistics are notorious for their unreliability. Everybody wants them, but nobody has them. The OECD and UNESCO make reasonable efforts, but as long as data for entire countries are missing, and indicator definitions differ among countries and change from one year to the next[5], the complete picture is unreliable.

[5] As an example: large cohorts of German citizens with Turkish passports persistently put Germany in the absolute top among education exporters. Trend analysts would benefit greatly from having a picture that distinguishes between such students and actively recruited international students. In 2005 the OECD, Eurostat and the UNESCO Institute for Statistics started to differentiate between foreign students (students with a different nationality than the host country) and international students (using the current UNESCO definition), but sudden, inexplicable adjustments in the figures of individual countries still suggest changes to data collection methods or definitions.

The UNESCO definition of international students is clear: 'students who have crossed a national or territorial border for the purposes of education and are now enrolled outside their country of origin'. But individual countries measure differently; moreover, they do not always filter their data to fit the UNESCO definition, or they suddenly start to do so in a particular year, resulting in quite dramatic variations that cannot be explained otherwise. Free mobility within the EU adds to this problem by being quite difficult to keep track of.

As a result, genuine evidence of global trends remains fairly anecdotal. However, even such anecdotal evidence, together with comparisons of poor-quality data from the past two decades, suggests some very distinct trends.

Rapid growth for shifting reasons

The first reason for the rapid growth is simply that the international dimension in higher education has grown explosively in the past 30 years and, importantly, has further accelerated over the past decade, moving from simple student exchanges towards intricate forms of deep collaboration. In 2008 an estimated 3.3 million tertiary students were enrolled outside their country of citizenship. This represented an 8.4% increase compared to the previous year. Between 2000 and 2008 the number of foreign tertiary students enrolled worldwide increased by 85%[6].

There has been a gradual shift of perception from viewing international education as a means of development cooperation and cultural exchange to considering international education as an industry. The figures demonstrate this: education has now become Australia's largest services export sector (at AU$18.6 (€13.5) billion), having overtaken tourism (AU$12.1 (€8.8) billion)[7]. By 2005 the annual earnings of the five leading exporters of higher education were ten times the country's annual commitments for multilateral and bilateral aid for higher education[8].

OECD countries have long been the main exporters of education, but the balance of importing countries has changed in recent years and continues to shift from countries with which the exporting countries had historical ties, such as former colonies, towards emerging countries, particularly in Asia, but also including Brazil, Russia and Turkey. In most countries the emphasis is on China, while in the UK it is on India. The Nordic and Baltic countries are developing stronger links with Russia and Austria and Greece mainly target countries in the Western Balkans. As one can only export so much knowledge until it has been transferred, this is likely to change; indeed, there are signs that Asian universities in particular are beginning to claim their share of the spoils, as they are now entering the international education market.

Increasing efforts are being made towards the internationalisation of national education and training systems in new EU Member States such as the Czech Republic, Romania and Poland. This is reflected in their strategies and investments in new instruments. Estonia uses cooperation as a means to improve the national higher education system. In general, new Member States are also particularly

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[6] *Education at a Glance*, OECD, 2010.

[7] Figures for 2009 (source: Australian Government, 2010). Please note that these are figures are strongly contested. In *Australian Universities Review*, demographer Bob Birrell last year argued that the figures are based on extrapolated 2004 figures, when a much larger share of the student population still came from far more affluent countries than from the currently dominant China and India. He estimated that the figure is nearer half the amount.

[8] *Trends in International Trade in Higher Education: Implications and Options for Developing Countries*, Sajitha Bashir, World Bank, 2007.

active in the recognition of qualifications, with a view to fostering mobility and adapting to new procedures and credit systems. Quality assurance is an important aspect of their cooperation priorities. In these countries there is a clear shift in international cooperation from bilateral to multilateral cooperation, with an increased interest in multilateral programmes.

The focus on promotion and marketing activities is steadily increasing. Many countries have branded their education systems. They have opened offices abroad, and actively participate in fairs around the world. Countries such as the UK (often through the British Council), Netherlands, Germany and Australia have done so for many years, but other countries, including some in Central and Eastern Europe, have recently followed their example, or are intending to do so.

While traditional mobility is not yet on the wane in absolute terms, growth in the offshore provision of education is accelerating. This can be seen most clearly in the rapid evolution of Asian campuses of Australian universities and in the mushrooming branches of the cream of European and North American business schools in the same region.

Growth in the development of joint and double degrees is also accelerating. Much of the international research on current trends[9] indicates that this is likely to become a focal area in the next decade or two.

Distance learning across borders has also become exponentially more accessible with the growth of the internet, and although there exist no supporting data as yet, this is likely to affect the future of cross-border education to an even greater extent.

Education support relating to development cooperation has received a considerable boost from the Millennium Development Goals and the Education for All Fast Track Initiative[10]. These have affected national strategies and the way in which countries allocate financial resources to the instruments they implement. This shift to align national strategies to the Millennium Development Goals has also produced a stronger focus on primary education in many countries in recent years, and this is bound to be sustained in the immediate future.

[9] See, for example, the conclusions of the March 2011 British Council conference *Going Global 2011* in Hong Kong (**www.britishcouncil.org/goingglobal.htm**), where much of the debate focused on the development of Transnational Education (TNE).

[10] Rooted in the Millennium Development Goals, the Education for All Fast-track Initiative helps low-income countries to achieve free and universal basic education. It was launched in 2002 as a global partnership between donor and developing country partners to ensure accelerated progress towards universal primary education by 2015. See **www.educationfasttrack.org**

6. An added-value role for the EU

It is interesting to see how the fragile balance between national sovereignty and added value through common interest has always dominated the discussions on EU interference in international education, and to a considerable extent it even continues to do so today, particularly in primary and general secondary education.

Perhaps it was a good thing that a non-EU initiative, the Programme for International Student Assessment (PISA), eventually heralded a change by feeding the media in countries around Europe with hard facts that forced their introspective authorities to raise their view across their borders. PISA certainly caused a great change in attitude and increased the willingness of many Member States to glean solutions to domestic problems from other countries.

Similarly, it was probably both necessary and advantageous that the Bologna Process was an initiative that came from the Member States themselves and was adopted fully by the European Commission rather than vice versa, and today it extends its reach and influence well beyond the EU.

One of the lessons that the history of international cooperation in European education teaches is that EU initiatives that were long delayed by Member States for fear that they would reduce national sovereignty in education eventually turned out to be resounding successes. It could be argued that this success was a direct consequence of the prolonged dialogue, and to some extent this is undoubtedly true. But ultimately the programmes that were launched in the 1980s and 1990s were not radically different from the proposals that preceded them by decades. In other words, there seems to be more reason to assume that international cooperation among a broad spectrum of partners of all types struck one of the core potentials of European cooperation: adding value through diversity.

Creativity is one of the cornerstones of economic development for societies that lack the advantage of cheap labour. Creativity – be it in the arts, in culture or in science – feeds on diversity. Continued intense cooperation, both within the EU and with non-EU countries, is therefore essential to the development of the knowledge societies we seek to establish.

The challenge will be to further intensify cooperation beyond the EU's borders, while fully respecting diversity, recognising it not as a barrier but as a strength.

It is here that a united Europe can play a crucial role: as a facilitator, promoting a framework that addresses common needs in a global environment, while leaving the content to those who are best suited to developing it, be they schools, universities, national authorities, social partners or private sector providers. Recent examples of such forms of 'forced voluntary' cooperation within the EU, most notably through the Copenhagen Process, have proven their worth in a variety of ways in cooperation with countries outside the EU. This is clearly exemplified through the work of the European Training Foundation in Turin, which supports the development of technical and vocational education in countries around the EU, with a strong emphasis on EU expertise and experiences.

Moreover, when it comes to recruiting brains there is much to be gained from solidarity among EU Member States. Alone, many of them do not stand a chance in the global arena. China and India both have more citizens than the entire EU. Europe has a rich academic history and a strong recent history of international collaboration. It can capitalise on both of these if it is able to overcome fragmentation without surrendering its diversity.

Where can EU intervention succeed without being seen as intruding in or conflicting with national interests? Looking at the recent past, there have been many examples of successful EU support programmes that were initially eyed with suspicion, but that eventually offered tremendous added value for all involved. The main focus of any new EU-level initiatives should therefore be on providing strong added value to individual Member States' own international cooperation initiatives and policies.

This includes the following options:

- Areas in which Member States are not in direct competition but rather pursue common goals and interests

One obvious area would be preventing a 'brain drain' of bright young Europeans to other parts of the world, for example by better promoting opportunities inside the EU that students would otherwise seek in other parts of the world.

Another obvious area is in development cooperation, where the Millennium Development Goals have already achieved considerable convergence (and in some cases even coordination) among the activities of individual Member States.

A third area of interest could be support for attracting temporary foreign staff to consortia of universities, perhaps simply as an extension to existing exchange programmes. The mapping study identified that only the UK, Italy and Slovakia had substantial programmes for visiting staff, although this image may be distorted because in some countries (e.g. Sweden) parts of the lump-sum public funding for universities would be earmarked for this.

A fourth area would be the development of world-class transnational degrees or master's programmes that individual Member States do not have the capacity to provide, or that would be enriched by the involvement of more than one country.

Finally, the joint promotion of Europe as a study destination, such as through the Study in Europe[11] initiative, is also an obvious spearhead.

In general, helping to strengthen the European Area for Higher Education and other focal points of the Bologna Process would be natural areas in which common ground could be found for new EU-wide initiatives, as these are areas in which the individual Member States, the European universities and European students have collectively agreed that international cooperation adds value to their own activities.

[11] See http://ec.europa.eu/education/study-in-europe

Areas in which a high proportion of Member States do not already have highly developed internationalisation strategies and/or instruments

In recent years the European Commission has been the engine behind some cutting-edge developments that have contributed greatly to the international attractiveness of European higher education. Perhaps the most notable of these is Erasmus Mundus, which has helped universities in various groups of countries to develop joint elite programmes. The impetus for this action came at a time when joint programmes were a relatively new phenomenon on the international scene.

The lesson drawn from this should be that it is of crucial importance for the European Commission to keep abreast with current developments and to initiate support and promotion measures before larger and perhaps dominant individual Member States or universities have developed new initiatives in detail at great expense, at which time EU support could be perceived as anti-competitive.

Another area that is underdeveloped is cooperation at levels other than ISCED 5 and 6, (i.e. anything below higher education). For example, under the direction of the Commission considerable experience has been gained in developing an international dimension in labour-market-related education and training. This can be extended to countries outside the EU, both to develop their own economy and labour markets and to tackle future labour shortages within the EU.

The financial benefit of attracting university students and human resources in general is one of the key drivers for the development of policies, strategies and instruments. Fields in which an immediate financial benefit is not evident, such as general development in low-income countries and strategic development in neighbouring countries and in those seen as future trading partners in the long term, may lag behind; as such, these deserve extra attention from EU policy planning.

Areas in which current EU policy provides for a strong rationale and mandate

This would most obviously include humanitarian aid and cooperation with non-EU countries. However, general skill needs have also been addressed successfully in the past, for example through the EU promotion of key competences and the various adaptations of these to the needs of partner countries outside the EU.

Newly recognised universal skills and competences that are indisputably within the core mandate of the EU, such as entrepreneurship, will require universal approaches, in the development of which the EU can take a leading role.

Areas in which the EU could provide specific support to certain groups of Member States

An example here would be specific support to the new Member States in expanding the current levels of international cooperation, possibly also covering other regions of the world. Intra-EU policy learning would have considerable potential in this regard as there is a demonstrable gap between the traditions of some Member States in Western Europe and many of the new Member States. Moreover, the EU has a proven track record in linking East and West through Tempus, and the credit and experience gained through this ought to be exploited.

Another obvious area that has emerged from the mapping study and that has been hinted at previously is that of pooling the resources of smaller countries who individually may not be able to

compete with top-quality programmes internationally, but who might be able to do so in groups of countries.

Areas in which gaps or specific needs are emerging

A common characteristic in relation to emerging needs is that they do not yet exist and are therefore hard to predict. However, one area that is bound to see considerable expansion in the near future is the off-campus delivery, and particularly digital delivery, of education and training. While national promotion offices, 'offshore' university branches and joint degrees are now well-developed areas in which many Member States feel that they are in direct competition with one another, the natural extension of these – virtual campuses – are not. Information is widely available on the world wide web, but entire programmes are not. This is an interesting area with much potential, not only for European collaboration but also for collaboration between the public and private sectors. It is also an area that will demand some form of supranational regulation, as 'degree mills' and 'academic cowboys' are already an issue in the virtual world today. A central, trusted and neutral clearing house or accreditation point for online degrees would benefit all partners, and a one-stop shop for Europe would provide tremendous benefits for international students wading through the current jumble of international degrees.

Another, slightly more controversial issue is the possibility that, even without direct EU intervention, the fading European borders will lead to the development of academic centres of excellence where research and education in narrow fields will amass in order to better keep up with the rapid pace of developments and ever higher levels of specialisation. This is currently happening in the healthcare systems of many EU countries and even in some fields of R&D that are closely connected to universities. In strictly academic terms, such centres of excellence would be tremendously beneficial to higher learning, and would be magnets for students and staff from outside the EU, though they could further marginalise more outlying regions. Anticipating such consequences deserves EU-wide focus.

A number of countries outsource certain parts of their education provision to others that can more efficiently develop the facilities for them (see Section 3). If economic pressure on education systems increases further, this is a model that may well become beneficial for, and more widely used by, other countries.

European Commission
Directorate-General for Education and Culture

B-1049 Brussels
32 - (0)2 299 1111
32 - (0)2 295 5719
eac-info@ec.europa.eu