Internationalization of Higher Education: Current Trends and Future Scenarios

6th IAU Global Survey on Internationalization of Higher Education
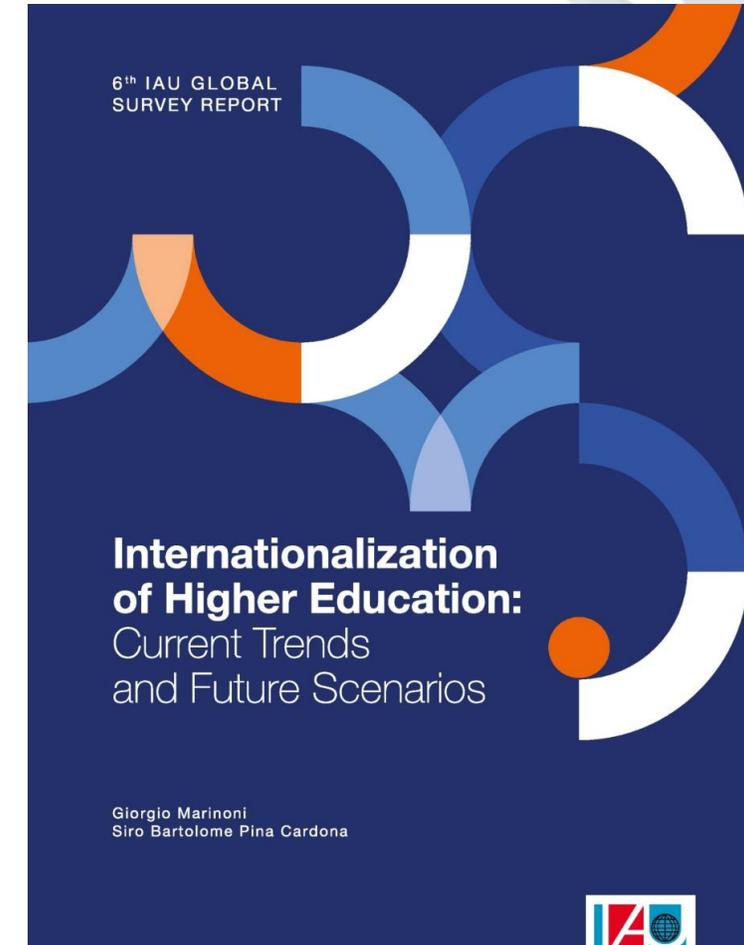
Giorgio Marinoni, Manager HE and Internationalization,
International Association of Universities

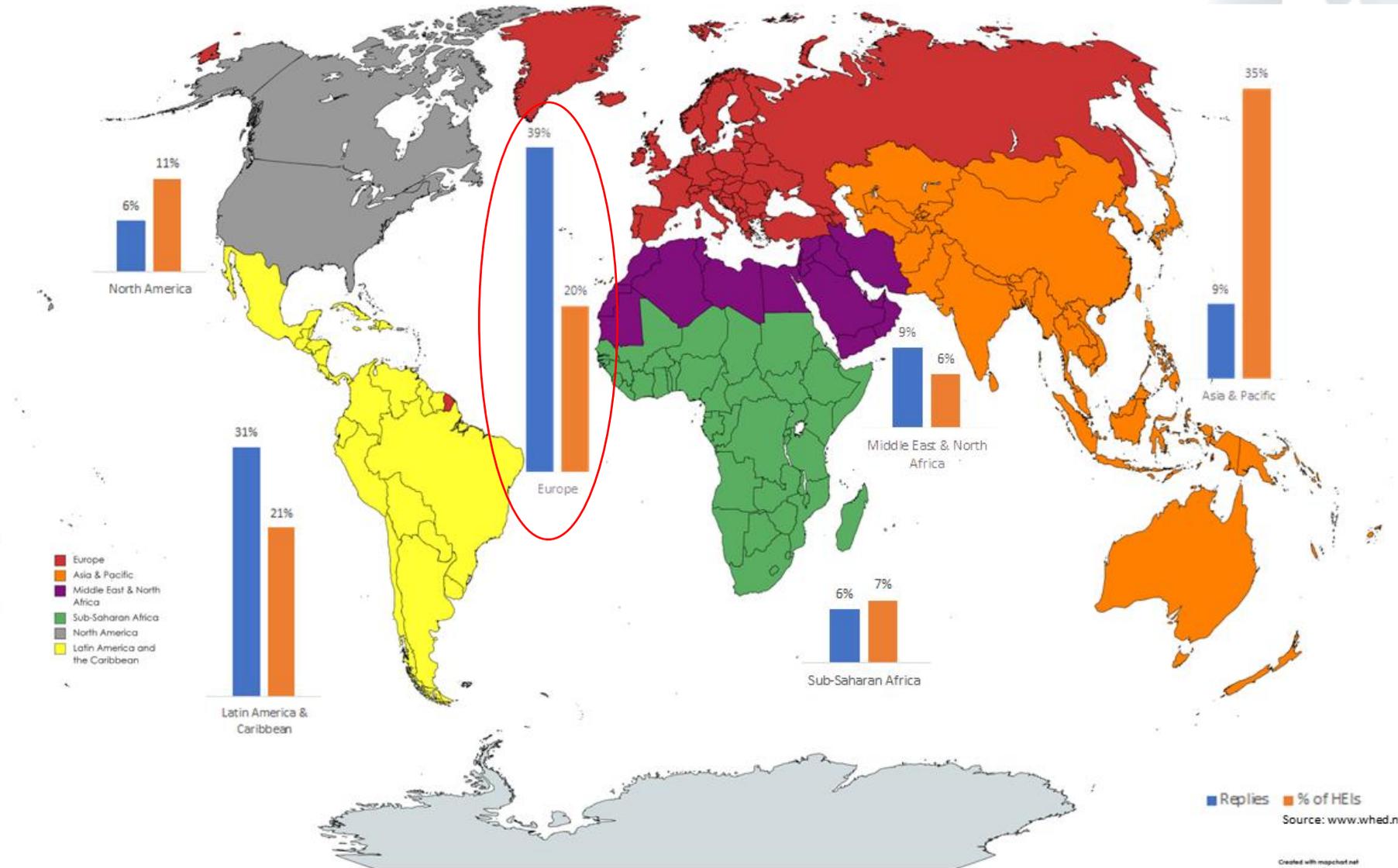*UNICA IRO meeting, Bucharest, Thursday, 14 November 2024*

INTERNATIONAL
ASSOCIATION OF
UNIVERSITIES
INTERNATIONAL UNIVERSITIES BUREAU

6ᵗʰ Global Survey

- Trilingual online survey (EN, ES, FR) open 15/1 - 15/6/2023

- Institutional survey: only one response per institution

- Responses from 722 HEIs in 110 countries and territories around the world

- Sufficient number of responses for a statistically relevant analysis at global and regional levels (6 world regions)

- Report and executive summary freely available on IAU website

Regional distribution of replies

- **Europe** and Latin America & the Caribbean are **overrepresented**

- North America and Asia & Pacific are underrepresented

- Middle East & North Africa is slightly overrepresented

- Sub-Saharan Africa is in line with its weight

35%

11%

6%

North America

39%

20%

Europe

9%
6%

Middle East & North Africa

9%

Asia & Pacific

31%

21%

Latin America & Caribbean

6%
7%

Sub-Saharan Africa

Europe
Asia & Pacific
Middle East & North Africa
Sub-Saharan Africa
North America
Latin America and the Caribbean

Replies ■ % of HEIs

Source: www.whed.net

INTERNATIONAL ASSOCIATION OF UNIVERSITIES
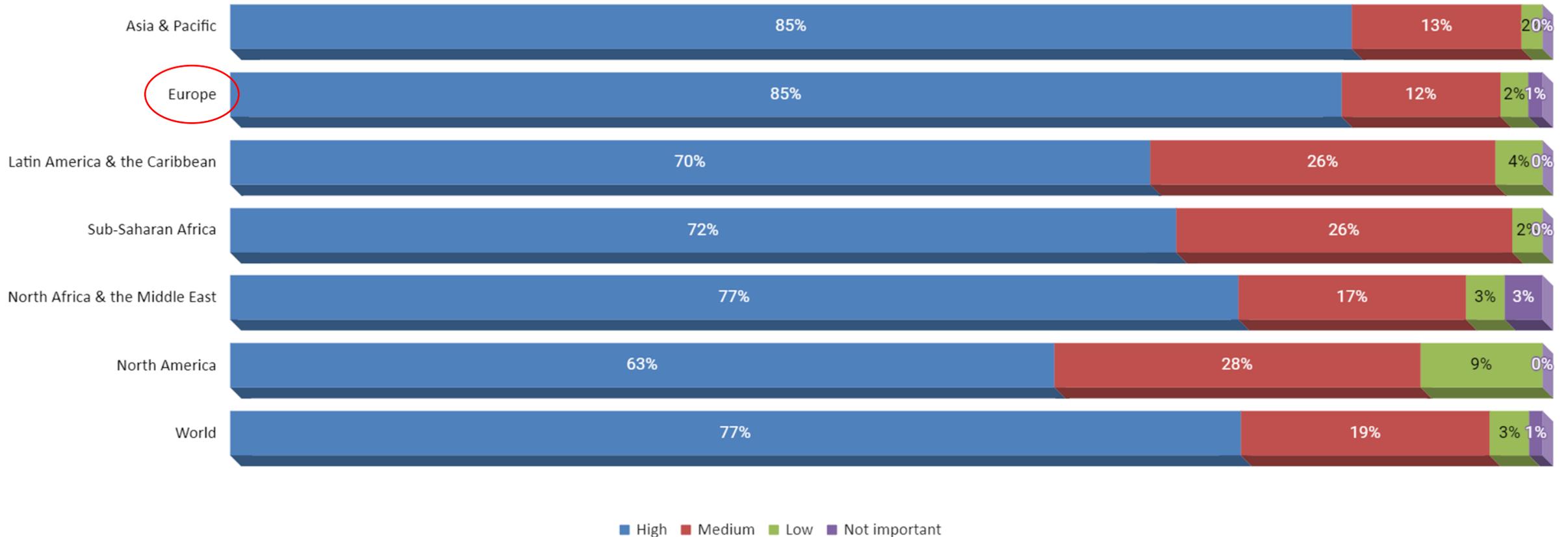INTERNATIONAL UNIVERSITIES BUREAU

A. Importance, benefits and challenges to internationalization

Level of importance of internationalization

Internationalization is of high importance in all regions of the world

LEVEL OF IMPORTANCE OF INTERNATIONALIZATION FOR THE INSTITUTIONAL LEADERSHIP

Region	High	Medium	Low	Not important
Asia & Pacific	85%	13%	2%	0%
Europe	85%	12%	2%	1%
Latin America & the Caribbean	70%	26%	4%	0%
Sub-Saharan Africa	72%	26%	2%	0%
North Africa & the Middle East	77%	17%	3%	3%
North America	63%	28%	9%	0%
World	77%	19%	3%	1%

Level of importance of internationalization

In the last 5 years internationalization has become more important in all regions of the world

Change in the level of importance of internationalization over the last five years by region

Region	Substantially increased	Increased	Stayed the same	Decreased	Substantially decreased
Asia & Pacific	34%	53%	6%	5%	2%
Europe	31%	52%	13%	1%	2%
Latin America & the Caribbean	33%	48%	14%	4%	0%
Sub-Saharan Africa	35%	49%	12%	5%	0%
North Africa & the Middle East	33%	51%	14%	0%	1
North America	28%	40%	19%	12%	2%
World	32%	50%	13%	3%	1%

■ Substantially increased ■ Increased ■ Stayed the same ■ Decreased ■ Substantially decreased

Level of importance of internationalization

Need to strategically connect with other HEIs globally -> internationalization as a strategic choice

Factors/reasons most responsible for the increase in the level of importance of internationalization

Factor	Percentage
Increased need to strategically connect with other HEIs globally	70%
Increased interest/demand by students at our institution	44%
Increased interest/demand by academic staff at our institution	39%
Increased demand and/or support by government or governmental organisations (national, regional, etc.) to focus on internationalization	31%
Shift of priorities at institutional level	24%
Requirement from international rankings	19%
Requirement for international accreditation	19%
Increased need for income generation through internationalization	18%

Internal drivers of internationalization

International office and academic leadership are the key internal drivers in all regions of the world

Most important institutional key internal drivers of internationalization

	Very important	Important	Somewhat important	Not important
International Office (at central/institutional level)	81%	14%	3%	2%
Head of institution (President / Rector / Vice Chancellor)	79%	16%	4%	1%
Deputy Head of Institution (Vice-President/ Vice-Rector /Deputy Vice-Chancellor / Chief Academic Officer /Provost)	67%	26%	6%	2%
Deans	44%	39%	13%	4%
Academic staff (teachers and researchers)	35%	47%	16%	1%
Academic Department Heads	35%	42%	21%	3%
Heads of research laboratories	33%	39%	20%	8%
Individual students	31%	39%	25%	4%
Student unions/student organisations	21%	35%	31%	13%
Administrative staff	16%	36%	37%	10%

■ Very important   ■ Important   ■ Somewhat important   ■ Not important
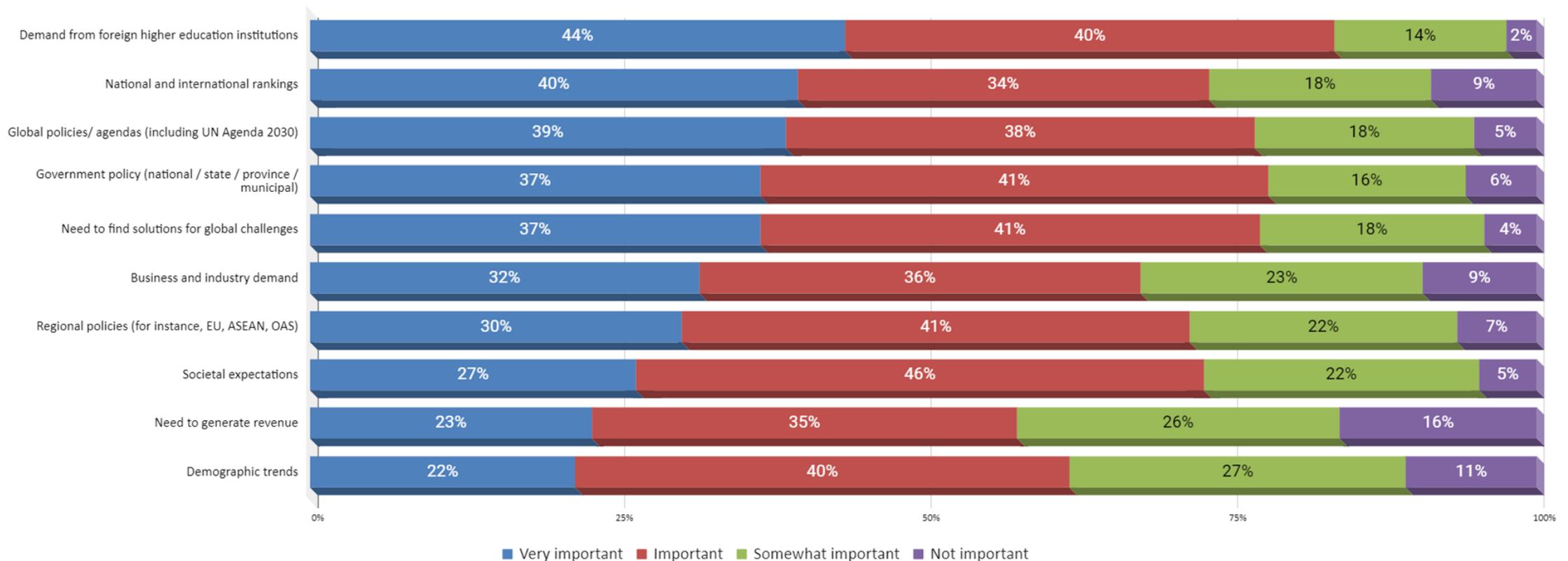
External drivers of internationalization

Several external drivers are of high importance, in Europe after Demand from foreign HEIs also

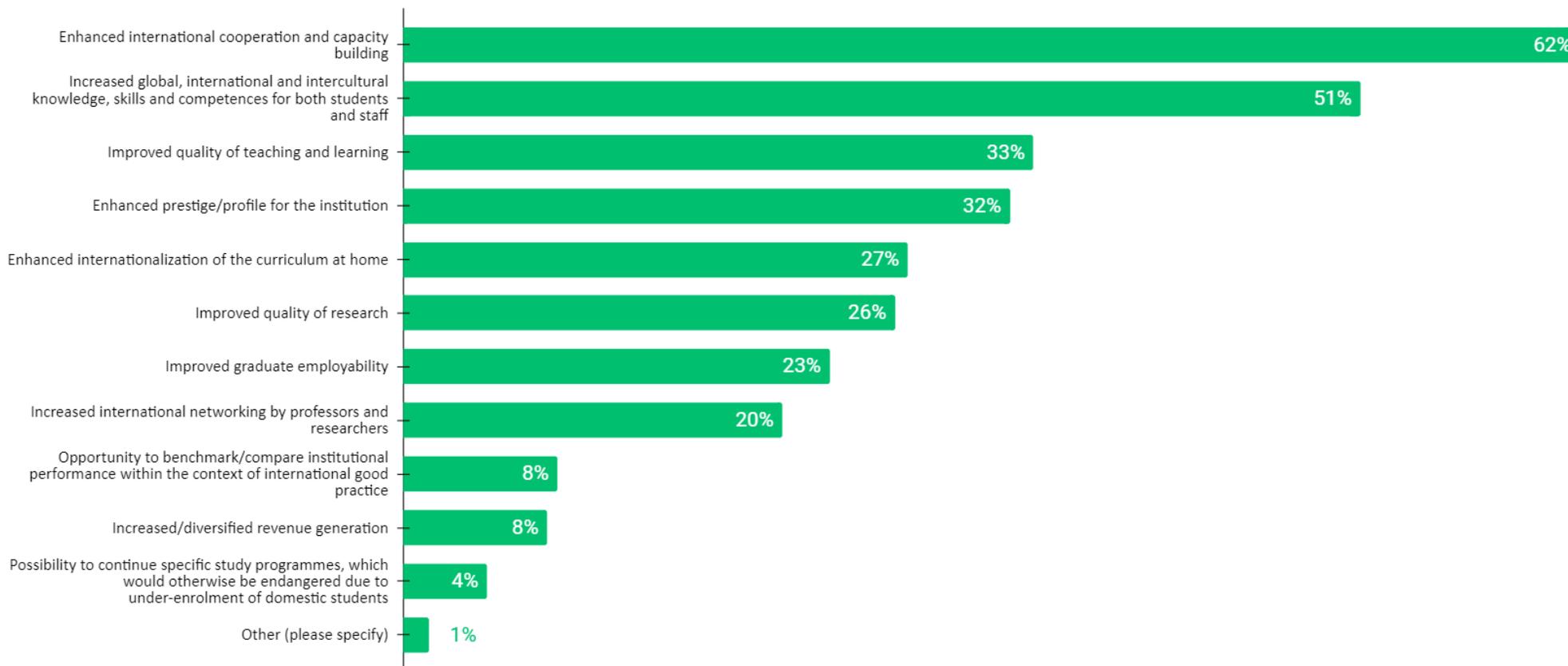- Government policy
- Regional policies

Most important key external drivers of internationalization

Driver	Very important	Important	Somewhat important	Not important
Demand from foreign higher education institutions	44%	40%	14%	2%
National and international rankings	40%	34%	18%	9%
Global policies/ agendas (including UN Agenda 2030)	39%	38%	18%	5%
Government policy (national / state / province / municipal)	37%	41%	16%	6%
Need to find solutions for global challenges	37%	41%	18%	4%
Business and industry demand	32%	36%	23%	9%
Regional policies (for instance, EU, ASEAN, OAS)	30%	41%	22%	7%
Societal expectations	27%	46%	22%	5%
Need to generate revenue	23%	35%	26%	16%
Demographic trends	22%	40%	27%	11%

Benefits of internationalization

Enhanced international cooperation and capacity building is the most significant benefit in all regions of the world
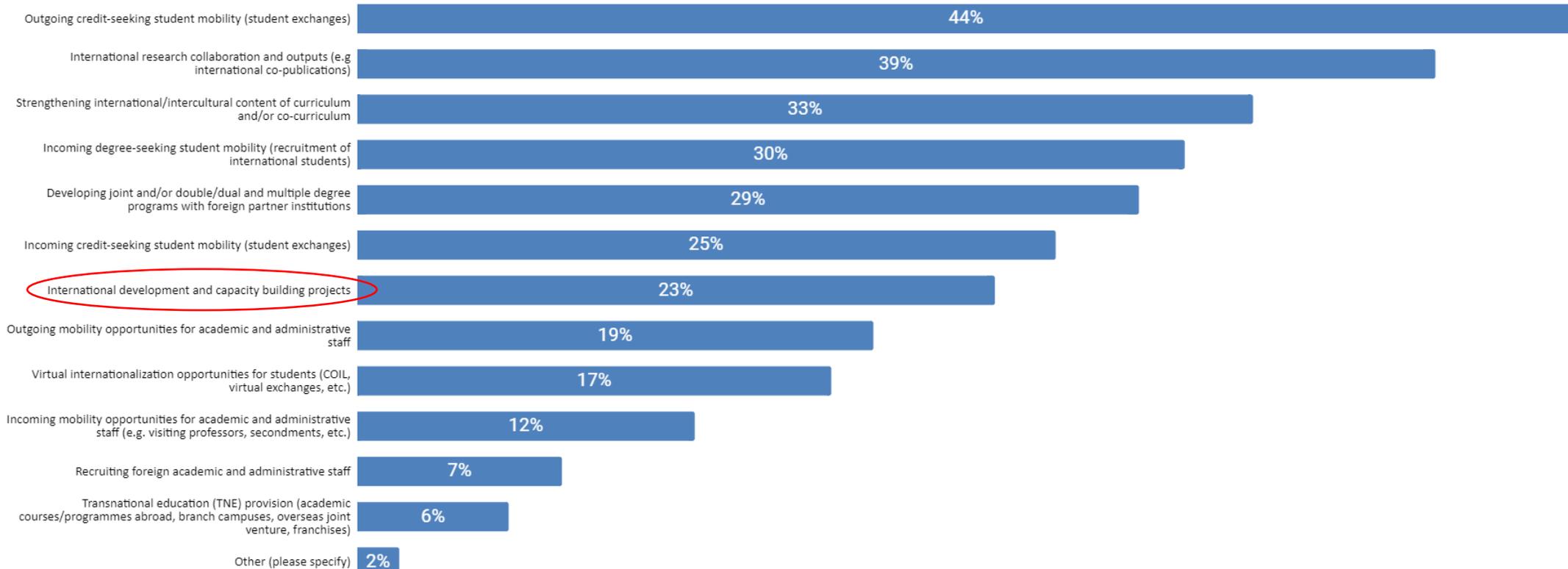

Most significant institutional benefits of internationalization

Benefit	Percentage
Enhanced international cooperation and capacity building	62%
Increased global, international and intercultural knowledge, skills and competences for both students and staff	51%
Improved quality of teaching and learning	33%
Enhanced prestige/profile for the institution	32%
Enhanced internationalization of the curriculum at home	27%
Improved quality of research	26%
Improved graduate employability	23%
Increased international networking by professors and researchers	20%
Opportunity to benchmark/compare institutional performance within the context of international good practice	8%
Increased/diversified revenue generation	8%
Possibility to continue specific study programmes, which would otherwise be endangered due to under-enrolment of domestic students	4%
Other (please specify)	1%

Internationalization activities

There is no common prioritised activity at global level, but mobility is more important than international development and capacity building projects…

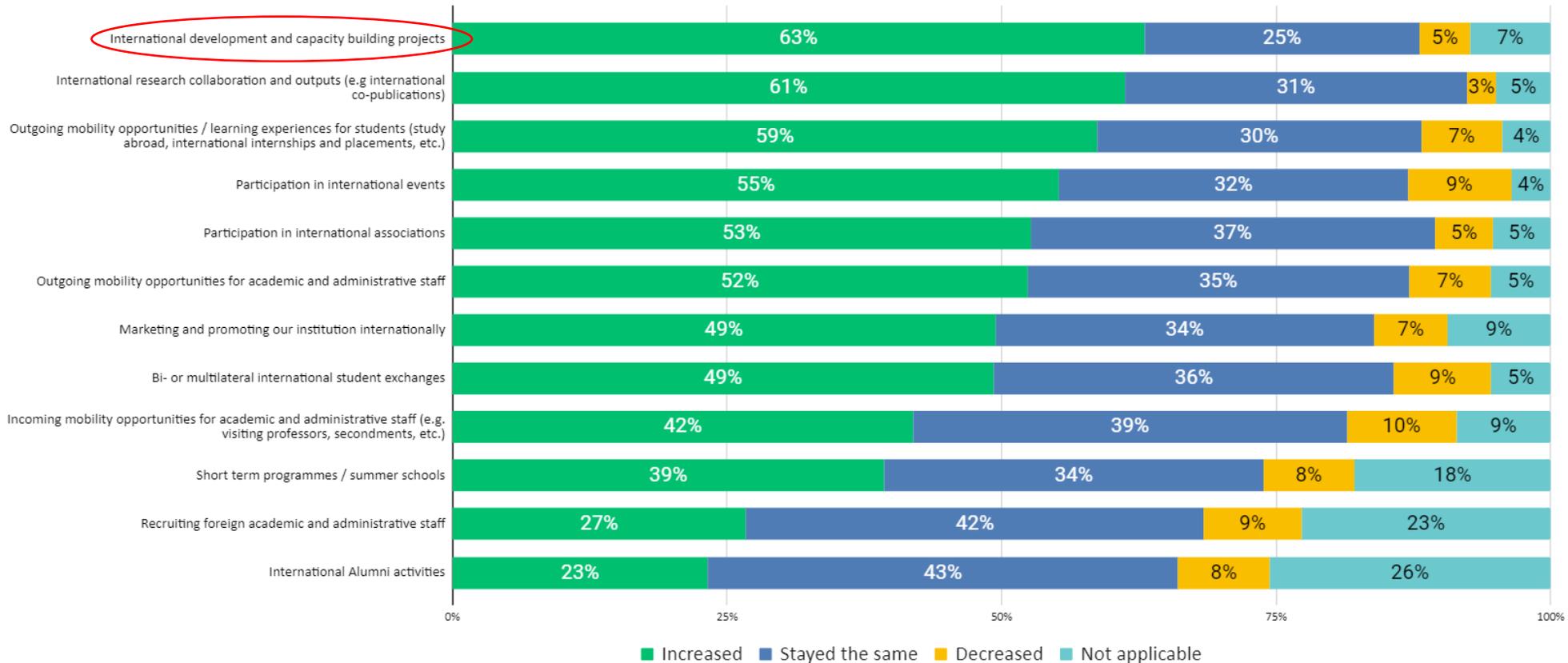**Priority of internationalization activities**

Activity	Percentage
Outgoing credit-seeking student mobility (student exchanges)	44%
International research collaboration and outputs (e.g international co-publications)	39%
Strengthening international/intercultural content of curriculum and/or co-curriculum	33%
Incoming degree-seeking student mobility (recruitment of international students)	30%
Developing joint and/or double/dual and multiple degree programs with foreign partner institutions	29%
Incoming credit-seeking student mobility (student exchanges)	25%
International development and capacity building projects	23%
Outgoing mobility opportunities for academic and administrative staff	19%
Virtual internationalization opportunities for students (COIL, virtual exchanges, etc.)	17%
Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)	12%
Recruiting foreign academic and administrative staff	7%
Transnational education (TNE) provision (academic courses/programmes abroad, branch campuses, overseas joint venture, franchises)	6%
Other (please specify)	2%

Internationalization activities

...however, international development and capacity building projects are the activity that increased the most in importance in the last 5 years

Change in importance of internationalization activities in the last five years

Activity	Increased	Stayed the same	Decreased	Not applicable
International development and capacity building projects	63%	25%	5%	7%
International research collaboration and outputs (e.g international co-publications)	61%	31%	3%	5%
Outgoing mobility opportunities / learning experiences for students (study abroad, international internships and placements, etc.)	59%	30%	7%	4%
Participation in international events	55%	32%	9%	4%
Participation in international associations	53%	37%	5%	5%
Outgoing mobility opportunities for academic and administrative staff	52%	35%	7%	5%
Marketing and promoting our institution internationally	49%	34%	7%	9%
Bi- or multilateral international student exchanges	49%	36%	9%	5%
Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)	42%	39%	10%	9%
Short term programmes / summer schools	39%	34%	8%	18%
Recruiting foreign academic and administrative staff	27%	42%	9%	23%
International Alumni activities	23%	43%	8%	26%

Legend: ■ Increased ■ Stayed the same ■ Decreased ■ Not applicable

Internationalization risks

- Institutional and societal risks of internationalization are very diverse

- There is no common risk for the majority of HEIs at global level

- **Europe** and North America are the only two regions where a clear institutional risk (**Increased workload for academic and administrative staff**) emerges as the most important

- "Brain drain" is clearly the most important risk in Sub-Saharan Africa, where it was selected by three quarters of HEIs

INTERNATIONAL
ASSOCIATION OF
UNIVERSITIES
INTERNATIONAL UNIVERSITIES BUREAU

B. Internationalization governance

Policy/strategy for internationalization

- Over three quarters of respondents **(77%) have elaborated a strategy for internationalization**

- **Europe** has the highest percentage of HEIs indicating the presence of a policy/strategy (85%)

- Sub-Saharan Africa has the lowest percentage of HEIs indicating the presence of a policy/strategy (61%), with a substantial portion of HEIs in the latter (28%) in the process of preparing it

- 42% of respondents recently revised or issued their policy/strategy for internationalization, with an additional 29% currently undergoing revision

- The vast majority (71%) of HEIs indicated that the revision of their internationalization strategy was **not due to the COVID-19 crisis**

Policy/strategy for internationalization

Figure 33

Internationalization policy/strategy and activities

- In Europe students are involved in the design, evaluation and implementation of the internationalization policy/strategy/plan at 63% of HEIs

UNIVERSITIES
INTERNATIONAL UNIVERSITIES BUREAU

Geographic priorities for internationalization

- Globally (59%) the majority of HEIs have geographic priorities for internationalization

Level of priority of each region

Region	Very important	Important	Somewhat important	Not important
Europe	75%	20%	4%	0%
North America	43%	34%	18%	5%
Latin America & Caribbean	38%	26%	27%	10%
Asia & Pacific	32%	34%	26%	9%
Sub-Saharan Africa	18%	24%	36%	22%
North Africa & the Middle East	18%	28%	39%	16%

■ Very important ■ Important ■ Somewhat important ■ Not important

Geographic priorities for internationalization

- **Regionalisation trend** in Asia & Pacific, **Europe,** LAC and at a lower extent also in Sub-Saharan Africa
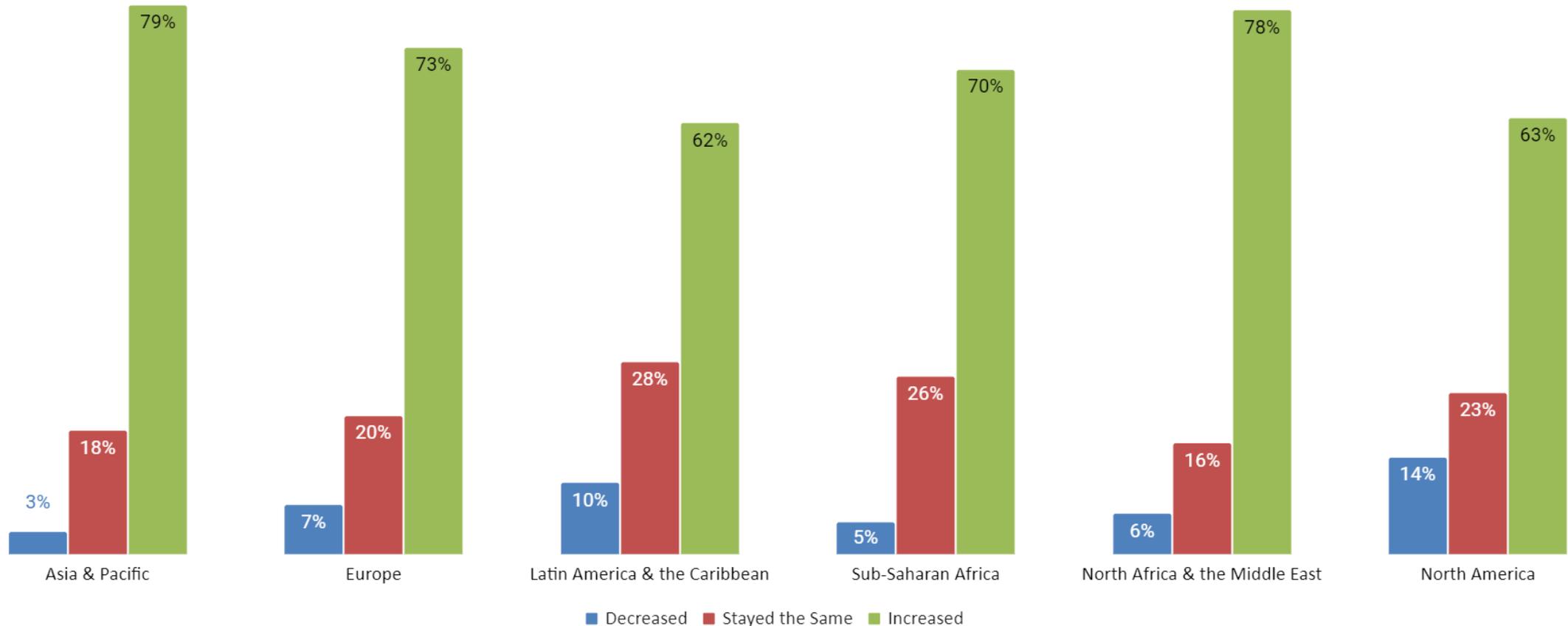
Table 21

Rows: geographical level of importance for internationalization (only "very important" %) Columns: regions of respondents	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Asia & Pacific	71%	28%	17%	37%	33%	71%
Europe	55%	90%	69%	63%	79%	39%
Latin America & the Caribbean	19%	17%	75%	16%	18%	43%
Sub-Saharan Africa	19%	17%	4%	58%	33%	43%
North Africa & the Middle East	23%	18%	6%	26%	44%	29%
North America	48%	34%	56%	37%	49%	21%

Geographic priorities for internationalization

- South – South cooperation beside intra-regional one is not a priority. The South looks North but the North does not look South

Table 21

Rows: geographical level of importance for internationalization (only "very important" %) Columns: regions of respondents	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Asia & Pacific	71%	28%	17%	37%	33%	71%
Europe	55%	90%	69%	63%	79%	39%
Latin America & the Caribbean	19%	17%	75%	16%	18%	43%
Sub-Saharan Africa	19%	17%	4%	58%	33%	43%
North Africa & the Middle East	23%	18%	6%	26%	44%	29%
North America	48%	34%	56%	37%	49%	21%

INTERNA
ASSOCIA
UNIVERS
INTERNATIONAL UN

International partnerships

- The number of international partnerships in the last five years has increased at the majority of HEIs in all regions of the world

Change in the number of institutional international partnerships over the last five years by region

Region	Decreased	Stayed the Same	Increased
Asia & Pacific	3%	18%	79%
Europe	7%	20%	73%
Latin America & the Caribbean	10%	28%	62%
Sub-Saharan Africa	5%	26%	70%
North Africa & the Middle East	6%	16%	78%
North America	14%	23%	63%

■ Decreased ■ Stayed the Same ■ Increased

International partnerships

- Globally, half the respondents (50%) indicated that changes in international partnerships were not primarily a result of the COVID-19 crisis
- Substantial regional differences

The role of COVID-19 on the changes in international partnerships by region

Legend: ■ Yes, definitely ■ Yes, to a large extent ■ Yes, but only to some extent ■ No

Asia & the Pacific: 10%, 14%, 24%, 53%
Europe: 4%, 5%, 27%, 64%
Latin America & the Caribbean: 4%, 20%, 43%, 33%
Sub-Saharan Africa: 13%, 13%, 31%, 44%
North Africa & the Middle East: 7%, 7%, 47%, 40%
North America: 0%, 6%, 36%, 58%

C. Internationalization of teaching and learning: activities

Virtual internationalization

- The majority of HEIs engage in virtual internationalization in all regions

Does your institution engage in virtual internationalization opportunities? (Regional results)

Region	Yes	No
Asia & Pacific	82%	18%
Europe	72%	28%
Latin America & the Caribbean	91%	9%
Sub-Saharan Africa	70%	30%
North Africa & the Middle East	58%	42%
North America	70%	30%

■ Yes ■ No

Virtual internationalization

- Globally, the majority of all HEIs that replied to the survey offer virtual exchanges (69%), COIL (60%) and online preparatory courses (56%), but not MOOCs (46%) and online degree programmes offered by institution to students in other countries (45%)

- Virtual exchanges are the most common activity in all regions, offered by a minimum of 53% of HEIs in North America to a maximum of 84% of HEIs in Latin America & the Caribbean

Table 31

Engagement in different virtual internationalization activities	Asia & Pacific	Europe	Latin America & the Caribbean	North America	North Africa & the Middle East	Sub-Saharan Africa
Online preparatory courses (language training, etc.) offered by our institution to students in other countries	60%	54%	64%	53%	51%	40%
MOOCs offered by our institution to students in other countries	55%	44%	54%	26%	45%	30%
Online degree programmes offered by our institution to students in other countries	48%	40%	54%	47%	42%	26%
Collaborative Online International Learning (COIL)	68%	50%	77%	51%	49%	49%
Virtual exchanges	79%	63%	84%	53%	57%	60%

Change in importance of virtual internationalization opportunities over the past five years

- All activities increased in importance over the past five years with virtual exchanges being the activity that increased in importance at the highest percentage of HEIs (80%)
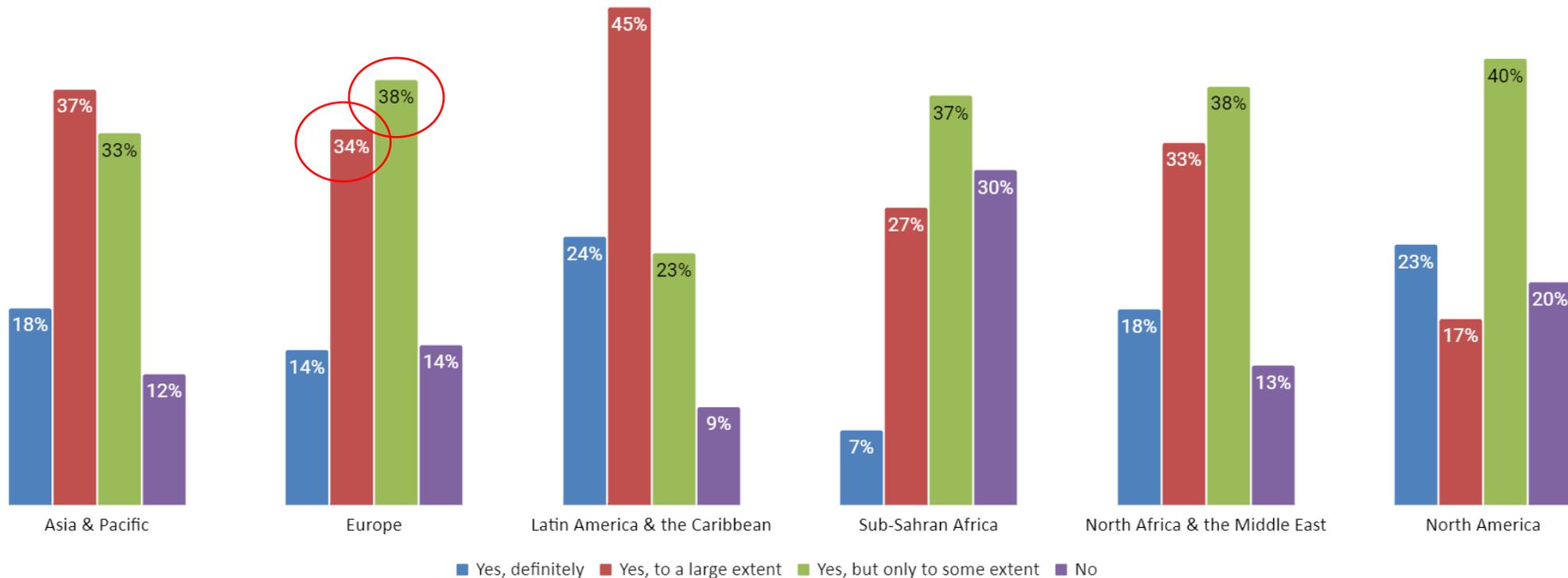
Change in importance of virtual internationalization opportunities over the last five years

	Increased	Stayed the same	Decreased
Virtual exchanges	80%	16%	3%
Collaborative Online International Learning (COIL)	76%	22%	2%
Online preparatory courses (language training, etc.) offered by our institution to students in other countries	74%	24%	2%
MOOCs offered by our institution to students in other countries	57%	40%	3%
Online degree programmes offered by our institution to students in other countries	54%	45%	1%

The role of COVID-19 on changes in importance of virtual internationalization opportunities

- In all regions the majority of HEIs reported that changes in importance of virtual internationalization opportunities and COVID-19 are linked to different degrees

Were the changes in importance in virtual internationalization opportunities due to COVID-19? (Regional results)

	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Sahran Africa	North Africa & the Middle East	North America
Yes, definitely	18%	14%	24%	7%	18%	23%
Yes, to a large extent	37%	34%	45%	27%	33%	17%
Yes, but only to some extent	33%	38%	23%	37%	38%	40%
No	12%	14%	9%	30%	13%	20%

G. Emerging issues and the future of internationalization

Diversity, equity and inclusion

- Internationalization policy/strategy and related activities take into account diversity, equity and inclusion at 80% or more HEIs in all regions of the world

- However, the target group is different in different regions:
    - **People with disabilities** are the most important target group in **Europe** (at 73% of HEIs) and North Africa & the Middle East (64%) and also important in sub-Saharan Africa (62%)
    - **People from low economic background** are the most important target group in Latin America & the Caribbean (71% of HEIs), sub-Saharan Africa (65%) and Asia & Pacific (63%)
    - **Ethnic/cultural minorities** are the most important target group in North America (78%) but not so important in any of all other regions

Most pressing future priorities for internationalization

- There is **no common pressing future priority** for internationalization at global level

At regional level:

- In Asia & Pacific and **Europe** priorities are very diverse and there is not a common one

- **Academic staff training in international, intercultural and global competencies** is clearly the most pressing priority in sub-Saharan Africa (81% of HEIs) and in North Africa & the Middle East (67%) and also at half of HEIs in Latin America & the Caribbean

- **Internationalization and interculturalization of the curriculum at home for all students** is the most pressing priority at more than half of HEIs in Latin America & the Caribbean

- **Increasing the number of incoming degree-seeking international students** is the most pressing priority at more than half of HEIs in North America

Further considerations

- The survey reflects the institutional perspective

- There can be a self-selection bias

- HEIs are the main but not the only actor in internationalization –> interesting to investigate the perception of other actors both internal (e.g. staff and students) and external (e.g. governments, businesses and civil society)

INTERNATIONAL
ASSOCIATION OF
UNIVERSITIES
INTERNATIONAL UNIVERSITIES BUREAU

Thank you very much!

Download the full report and its executive summary from the IAU website

6th IAU GLOBAL SURVEY REPORT

Internationalization of Higher Education: Current Trends and Future Scenarios

Giorgio Marinoni
Siro Bartolome Pina Cardona

INTERNATIONAL ASSOCIATION OF UNIVERSITIES
INTERNATIONAL UNIVERSITIES BUREAU