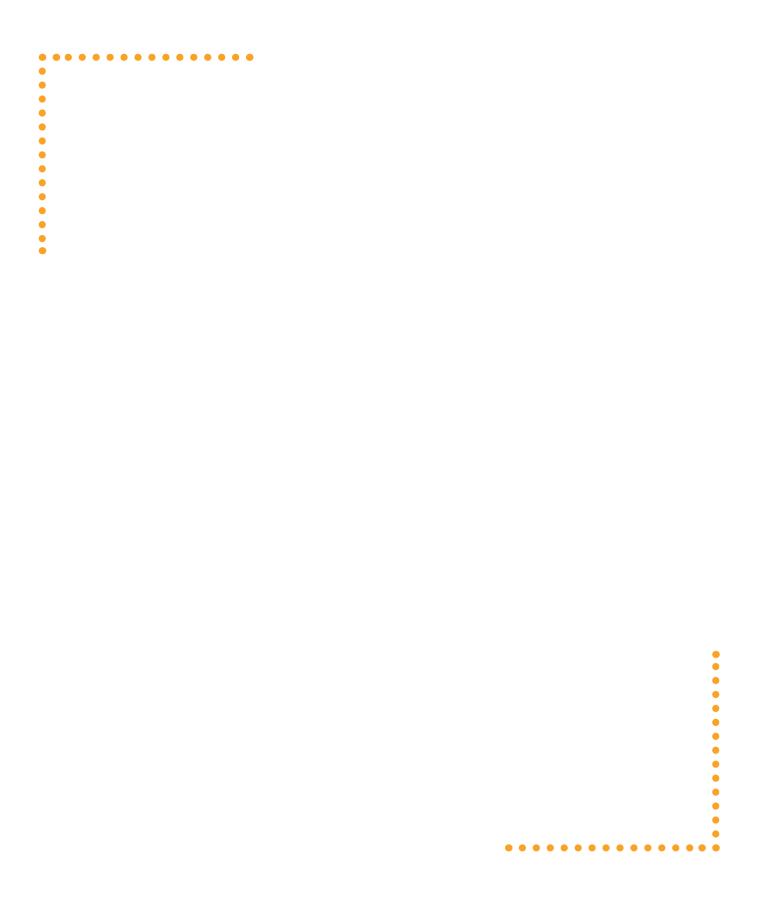


# International Trends in Higher Education 2016-17



## Introduction

Once considered a useful add-on, internationalisation has matured into a core strategic pillar for virtually all universities aspiring to global significance. Many institutions have moved from equating international strategy with international student recruitment to developing mature internationalisation agendas that incorporate recruitment, research collaborations, and capacity-building. At Oxford, expanding the University's Global Reach is an overarching priority of our strategic plan.

This *International Trends in Higher Education* report, our third, provides an overview of changes and broader developments in higher education (HE) around the world. We have selected the most significant changes affecting international student mobility, international research collaborations, the relationship between universities and governments, rankings, and international expansion in the form of branch campuses. While stories about international HE are frequently seen in media outlets and industry publications, none provide a periodic general overview of significant developments in the sector outside the UK. This report attempts to fill that gap.

This year's report focuses on the growing role of governments in driving HE internationalisation, the increasing emphasis in many countries on improving HE quality and graduate employability, and the growing confidence of leading universities in developing countries to build an international profile. It also includes an in-depth look at international student mobility and recruitment trends.

Based on a survey of a range of statistical tools and reports provided by UK and international organisations, university sector bodies, and media outlets, this report has been written by Katherine Benson and Loren Griffith, with editing by Nina Tomlin.

We have written with the interests of colleagues across Oxford University in mind, and where possible place Oxford in the context of these global trends. However, this report will also once again be posted publicly on the university's website, in the spirit of our strategy to increase Global Reach: 'To develop the University's position as a global forum for intellectual engagement, through the proactive communication of ideas generated at Oxford and through openness to new ideas generated elsewhere.'

Loren Griffith, Director of International Strategy



The International Strategy Office is responsible for developing a coherent strategy to promote Oxford's international relations, global profile and international competitiveness. The work of the office is broad and includes such issues as Oxford's approach to:

- Promoting deeper engagement with key countries/regions
- International collaborations (research and education)
- International educational experiences for all students
- Integration of international academic staff and students
- · International student recruitment and funding

International Strategy can provide information, advice and guidance to colleagues within the University on key countries and regions, existing collaborations with overseas institutions and opportunities being developed for international engagement.

The office provides information to outside contacts on Oxford's international links and often acts as a first point of contact for overseas institutions wishing to visit Oxford University in order to discuss potential future collaborations at the institutional level. The office also co-ordinates links with the international alliances of which Oxford University is a member.

\*References are provided in the notes, and the International Strategy Office would be happy to provide further details and analysis on any topic covered here. Requests for further information should be addressed to international.strategy@admin.ox.ac.uk.

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## National governments increasingly seek to drive internationalisation

The International Trends in Higher Education 2015
report highlighted the growing popularity of a range of internationalisation strategies – beyond the traditional emphasis on international student recruitment – and showcased examples of branch campuses, international research collaborations, and collaborations between universities and industry. As institutional internationalisation has become an embedded and widely accepted part of the higher education sector, the development of strategies to develop and manage international engagement is increasingly taking place at the national and regional level as well as at the level of individual universities.

The UK's research funding landscape reflects this shift toward driving international engagement. While Research Council funding has declined in real terms, two large sources of funding have been developed in recent years – the Global Challenges Research Fund and the Newton Fund. Both are funded by the UK government (Newton Fund monies are matched by partner country governments), and both are focused on research on international topics, undertaken through international collaboration.

More broadly, and aside from its role in developing and improving research, teaching and innovation, internationalisation in education is increasingly seen as means of improving institutional and national visibility and influence. A 2016 report by the British Council on national policies for international engagement in higher education found that the number of countries committed to internationalisation in HE is increasing; 23 of 26 countries studied, for example, now have effective policies to encourage student

mobility. The countries rated as most open (policies favouring exchange and internationalisation) were Australia, Germany, the UK, Malaysia, Germany, and China. on

Other countries, such as France, are scrambling to catch up. The French government has concluded that the country is behind peers on internationalisation, especially in providing transnational education (TNE).<sup>02</sup> The country's fragmented system of specialised institutions is seen as partly to blame. So in 2013, universities, grandes écoles and research centres (such as CNRS) were joined into research clusters with research policies, coordination and training decided at the regional rather than institutional level (so-called COMUE).03 Paris-Saclay is one well known knowledge hub, with a campus and concentration of institutions rivalling those of London and Boston. <sup>04</sup> Each of the 13 regions of metropolitan France now has at least one higher education and research cluster within its borders. 95 As part of the restructure, new visa regulations and easier administrative requirements for international students were implemented, as was an increase in the number of courses taught in English, and French lessons for non-Francophone international students.06

Brazil made a big splash in 2011 with Science without Borders, a government programme aiming to support 100,000 Brazilians on programmes abroad. The programme was suspended in 2015, amidst turmoil in Brazilian national politics. But Brazil's commitment to internationalisation has not waned – it has instead changed focus. In 2017 Brazil is launching a new programme, focused on supporting the internationalisation of Brazilian institutions rather than



international student mobility. Still under development, the new programme 'will require each individual university to form a coherent elaborated internationalisation strategy together with international partners in order to gain access to mobility funding.'97

The 2015 Trends report highlighted China's strategy of identifying leading universities through Project 985 and the C-9, and then dedicating the lion's share of resources to them: the C-9 universities receive ten percent of the entire national HE budget. China now has four universities in the Times High Education's top 200°8, up from two in 2011. Among developing countries, Russia is

also adding more universities to world-class ranks and seeing their best universities inch closer to the top. India's leading universities are also moving up the rankings, though none has yet broken into the top 200. Brazil and South Africa seem to be moving in the opposite direction: Brazil's leading university, São Paulo, and South Africa's leading university, Cape Town, fell in the rankings between 2012 and 2017.<sup>09</sup> (São Paulo is now ranked 251–300<sup>th</sup>). The positions of Korea's leading universities have bounced up and down, reflecting the fact that universities' positions in the rankings fluctuate more than their underlying quality.

Figure 1: Rank of universities in developing countries included in the Times Higher Education top 200, 2016-17<sup>10</sup>

	Peking (China)	Tsinghua (China)	South National (Korea)	KAIST (Korea)	POSTECH (Korea)	SKKU (Korea)
2017	29	35	72	89	104	137
2014	45	50	44	56	60	201–225
2011	37	58	109	79	28	Not ranked
	Cape Town (South Africa)	U of Science & Technology (China)	Fudan (China)	Witwatersrand (South Africa)	Lomonosov (Russia)	National Taiwan Univ (Taiwan)
2017	Cape Town (South Africa)	& Technology	Fudan (China)			Taiwan Univ
2017		& Technology (China)		(South Africa)	(Russia)	Taiwan Univ (Taiwan)

#### National focus on quality assurance

over the last decade, many countries have emphasised widening access to higher education, bringing rapid growth in the number of universities and degree programmes on offer. The global tertiary enrolment ratio (the share of the student-age population at university) increased from 14% to 32% in the two decades to 2012."Andreas Schleicher, the OECD's head of education, has written that China now opens the equivalent of a new university every week."

This rapid massification has in turn spawned a move in many countries to bolster higher education quality. In South Asia and Latin America in particular, few universities appear in the international rankings, there is a shortage of qualified faculty, and quality control and teaching methods are often outdated. The goal of providing high quality teaching and research through an internationally recognised higher education sector, which in turn produces graduates with the skills needed by local and regional employers, is shared by all national education reforms. But the manner in which countries aim to achieve that goal varies considerably.

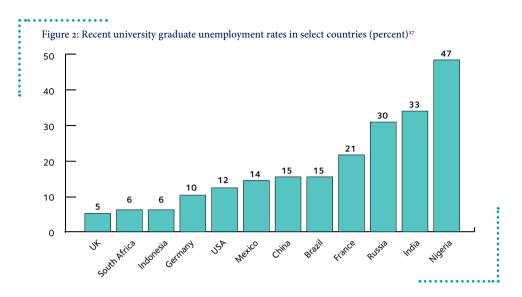
Turning to two specific examples, Ecuador and India have both recently launched programmes to reform their universities, with Ecuador focusing on measuring and evaluating learning outcomes for students, while India's Ministry of Education has chosen to begin with an overhaul of national and institutional higher education infrastructure. Launched officially in 2010, Ecuador's 71 universities (serving over 600,000 students between them) were evaluated and graded in 2009, with 14 institutions subsequently ordered to close, and a further 26 deemed in need of major improvement. 13 Reforms introduced included an admissions aptitude test for public universities - the first ever in Ecuador - and a new requirement for faculty to have at least a Masters and preferably a PhD. To improve teaching quality, government scholarships were made available for postgraduate study overseas, with 3,000 awarded in 2012.14 Since the reforms began, Ecuador's ranking across a range of higher education matrices in the World Economic Forum's Global Competitiveness Index has improved dramatically, with an overall improvement from 93-108 in 2012 to 73 in 2016-17.15



Participation in higher education in India has expanded enormously in the past decade, doubling from 14 million in 2007 to 28 million in 2013, and India is forecast to have the largest student-aged population in the world by 2025, of around 119 million.<sup>16</sup> Quality control in the Indian higher education sector has lagged behind institutional expansion however, with a British Council report highlighting overemphasis placed on rote learning, a shortage of qualified faculty, and outdated curricula, leading to students graduating unprepared for employment, and institutions which fail to be internationally ranked.<sup>17</sup>

The Indian government's Twelfth Five Year Plan, launched in 2012, emphasised the need to focus on excellence in teaching and research in order to improve the quality of India's graduates and research conducted within its universities, and aims for measurable outcomes in both learning and research, rather than continuing the historic focus on processes and absorbing rather than producing information. As part of these plans, a new quality assurance agency with a budget of US\$1.5 billion was announced in February 2016, and will work on a strengthened accreditation system, doubling the number of faculty, and will shift India's accreditation system to a credit-based and internationally recognised form of assessment. Some states have already begun to make changes, with developed states such as Gujurat and Tamil Nadu working to build employability skills for their students, and developing exchanges and international collaborations with partners in the UK and elsewhere.





### Graduate employability takes centre stage

In the UK there is growing concern about the employment prospects of recent university graduates. But while graduates' average earnings have declined a bit, UK graduates' unemployment rate remains relatively low, at just under five percent. In many countries, the problem is more severe: a larger and growing proportion of university graduates are languishing in unemployment, including in both developed and developing countries.

Student pressure on universities to help them get good jobs is not new, but it is becoming a greater priority of governments as well. Governments in many countries have for years put pressure on universities to be relevant and responsive to societal needs. This initially focused on applied research and expanding access, but recently, improving employability has been added to the list<sup>22</sup>.

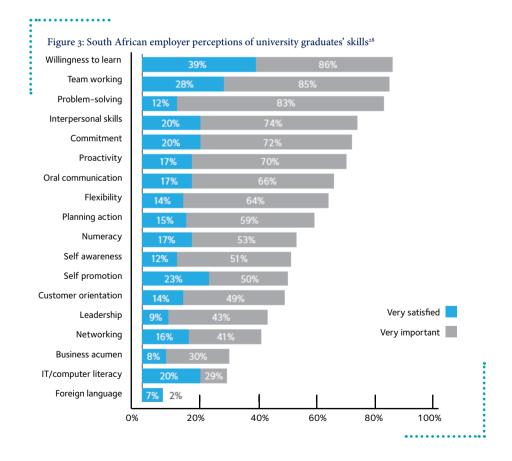
One might expect job markets with low proportions of university graduates to quickly absorb new graduates. But in many developing countries, the reverse is true: employers doubt the job-readiness of graduates, and as a result unemployment levels are high.

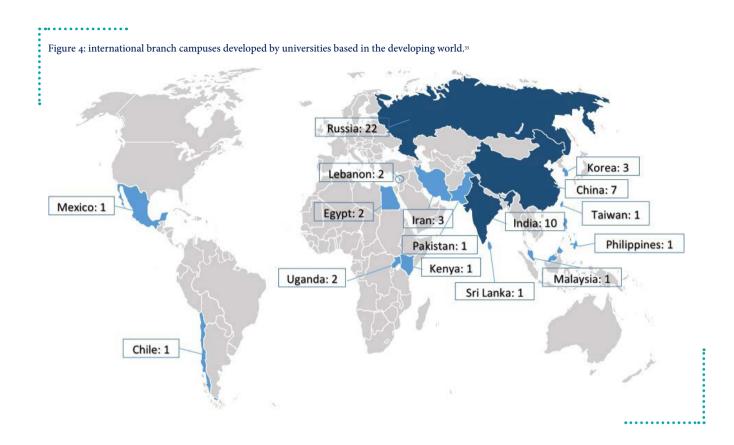
In India, for example, one survey of employers found that only 7% of India's engineering graduates (a field thought to develop good employment prospects) are job-ready. Skills found

particularly lacking include English language skills and the ability to innovate by applying conceptual learning to real-world problems. <sup>23</sup> A major British Council study of the employability of African university graduates found that 'employers across the region complain of a lack of basic, technical and transferable skills.' <sup>24</sup> Uneven and often poor quality teaching, resulting from underqualified staff, large class sizes, and outdated teaching methods, are held responsible.

In response to this concern, two new university league tables focused on employability have sprung up. The Times Higher Education now publishes a ranking based on a survey of employers,<sup>25</sup> while QS has developed an employability ranking based on five categories: employer reputation, alumni outcomes, employer partnerships, employer-student connections, and graduate employment rate.<sup>26</sup> Both methods result in a list of top performers strongly correlating with overall university league tables (Stanford, MIT, Oxford, Princeton, and Cambridge are in the top ten across the board). Particular standouts in employability include Tsinghua University (#3 in QS), Sydney University (#4 in QS), École Polytechnique ParisTech (#6 in QS), and the Technical University of Munich (#9 in THE).







## Universities in the developing world increasingly assume a regional or global role

ne of many signs of the increasing confidence and resourcefulness of universities in the developing world is the growing number of branch campuses they have established.<sup>29</sup> The first wave of branch campuses were created by Western universities as a way of globalising their student body and education. Now universities in Russia, India, China and other developing countries are spreading their wings, building branch campuses designed to bolster their reputation and attract new types of students. Many of these campuses are in the same region as the home campus. Russian universities, for example, have concentrated in former Soviet states. Xiamen University has recently become

the first Chinese university to open a campus in Malaysia, a popular location for foreign universities.<sup>30</sup>

Others are setting up in the developed world. Peking University's Peking HSBC Business School (PHBS) is developing a campus near Oxford in the UK.<sup>31</sup> Mumbai University is actively seeking a site for a new campus in the USA.<sup>32</sup> Overall 65 of the 310 international branch campuses catalogued by the Cross-Border Education Research Team (CBERT) at the State University of New York-Albany have been launched by developing country universities.<sup>34</sup>



### Patterns in student mobility

The number of students who choose to study at a university overseas has grown dramatically in recent decades, nearly quadrupling from 1.3 million in 1990 to 5 million in 2014.<sup>35</sup> As the 2015 Trends report highlighted, the composition of the globally mobile student body has changed significantly over the last decade, with student mobility shifting from a largely unidirectional east-west flow to a multidirectional movement and encompassing non-traditional sending and host countries.<sup>36</sup>

While 6% of students in higher education in OECD countries are international, the proportions vary greatly from country to country. Over a fifth (21.1%) of students in the UK are international – more than any other major country, though Australia follows closely at 20.7%. This compares to 8% in Germany, and 5% in the United States.<sup>37</sup>

However, the UK's population of international students is growing the slowest of any large country – up just 0.6% in 2015. Student mobility to North America is growing much faster (up 10.1% in Canada and 7.1% in the US) and in much of Europe (up 7.8% in Germany and 3.6% in France).<sup>38</sup>

The data confirms the acceleration of a relatively new trend in student mobility: the decision to study abroad but close to home. In Latin America, the percentage of students studying abroad in the region grew from 11% in 1999 to 23% in 2007, while the percentage of East Asian students studying abroad within ASEAN countries increased from 26% to 42% over the same time period.<sup>39</sup> No less than 91% of Japan's international students come from Asia.<sup>40</sup>

The continuation of growth in student mobility overall also camouflages the increasing capacity in higher education provision within certain countries. China, in particular, has invested significantly in its higher education sector in the last few years, and in parallel, the number of Chinese students applying to take postgraduate courses in US universities has declined year on year since 2012.<sup>41</sup> (Chinese student numbers at UK universities have continued to grow, though at a slower rate than previously: just two percent from 2014–15 to 2015–16. <sup>42</sup>) Excess university capacity in Japan has fed a growing appetite for international students. The country has set a national goal to increase the number of international students to 300,000 by 2024.<sup>42</sup>

At the same time, some countries find a large proportion of their student-aged population choosing to leave the country for tertiary education. A mismatch between rapidly growing demand for higher education and low domestic higher education capacity commonly leads to outbound movement of students.44 In Nigeria in 2015, the number of applicants for university places was twice as large as the number of available seats; partly as a result, the number of Nigerian students abroad increased by 164 percent in the decade between 2005 and 2015. This trend is set to continue, making Nigeria the fastest-growing source of mobile students: tertiary enrolment among Nigerians is projected to double from 2.3 million students in 2013 to 4.8 million in 2024.45 However, Nigerian students are increasingly staying close to home: Ghana recently passed the US as the second-most-popular destination country, behind the UK.46

Figure 5: Higher education students enrolled outside their home country (millions)<sup>47</sup>

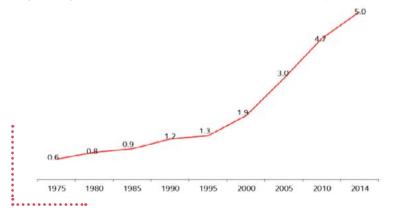


Figure 6 shows, on the left side, the number of nationals from the twenty largest source countries studying for higher education degrees in major host countries, according to the latest figures from Project Atlas, an Institute of International Education initiative. China is by far the largest source country, sending 758,000 students abroad to study in 2015. Other countries sending more than 50,000 students are an eclectic set: India, South Korea, the United States, Kazakhstan, France, and Saudi Arabia.

The right side of the figure shows the number of nationals from these countries studying at Oxford. Proportionally, Oxford has many more students than would be expected from the United States, Germany, Italy, Canada, France, and Hong Kong. This pattern is likely explained in large part by the relative prevalence of English in these countries, a historical pattern of sending students to Oxford and to the UK generally, and high quality educational systems. Conversely, Oxford has proportionally many fewer students than would be expected from China, India, South Korea, Kazakhstan, and Saudi Arabia (and, to a lesser degree, Vietnam, Morocco, Ukraine, and Taiwan). Students from these countries tend to study in countries other than the UK. The United States is the main choice for students from China, India, South Korea, Saudi Arabia, Vietnam, and Taiwan (Canada and Japan are also popular destinations for students from many of these countries). Where a second language other than English prevails, student mobility patterns are strongly affected.

Figure 6: Students studying in the top 10 host countries ('000) vs Students studying at Oxford<sup>48</sup> 758 China 991 300 India 390 166 South Korea 144 76 United States 1573 71 Kazakhstan 10 61 France 308 Saudi Arabia 21 61 45 Vietnam 30 Italy 42 385 Morocco 37 5 35 Malaysia 146 Germany 33 Japan 33 100 29 Pakistan 81 28 Nigeria 61 Ukraine 29 27 361 Canada Taiwan 54 68 Brazil Hong Kong 156

Russia is the overwhelming destination for Kazakh and Ukrainian students, and France is preferred by Moroccan students.

Government initiatives have also emerged to encourage domestic students to study abroad. Brazil's 'Science without Borders', Mexico's 'Proyecta 100,000', and Saudi Arabian government scholarships have all supported tens of thousands of scholarships for their students to study for a degree or a year abroad, as a means to develop a globally competent workforce while developing domestic capacity.

# Government and institutional initiatives to promote mobility

overnments – particularly those in non-traditional host countries – continue to develop a broad range of strategies to develop the appeal of their higher education sector to foreign students and scholars, and to develop research and teaching links with international partners with the aim of increasing institutional visibility. Japan and China, in particular, have targeted international students as a way to achieve a number of national aims, including encouraging the internationalisation of higher education in their countries (in part as a tool to drive up research and teaching standards), developing links between Japanese and Chinese universities and peer institutions overseas, and developing a workforce that meets the needs of their industries.

Japan has seen growth in the number of foreign students enrolled in its universities, with a 23% increase to 171,122 between 2014 and 2016. 49 Begun in 2009, the 'Global 30' programme aims to develop Japan's universities into global institutions, and includes the development of a number of courses taught wholly in English as a means to encourage international student enrollment. More recently, the Japanese government has directed funding to expand links between Japanese universities and those in ASEAN countries, particularly Vietnam and Indonesia. 50



Chinese universities are internationalising in many directions, but Africa has been a particular focus. China has funded more than 40,000 scholarships for African students over the last five years, and has announced plans to fund 30,000 more over the next three years. China's President Xi Jinping also launched a number of new international initiatives in 2015-16, reflecting a big push for China to develop closer links with Africa across a range of areas.51 In addition to the scholarships for African students mentioned above, China has created visiting placements for 200 African scholars and 40,000 training opportunities on offer in organisations and companies across China, specifically for African

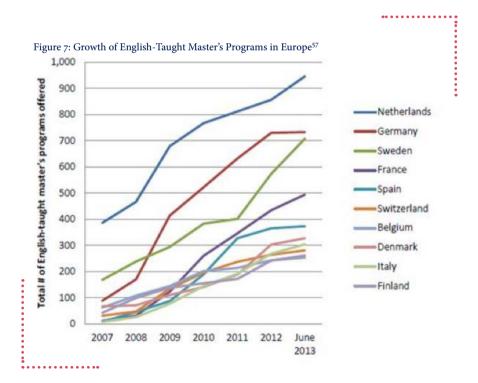
nationals.52 President Xi also plans to develop a network of Chinese training centres to provide vocational education in Africa for African technicians.53 The government of South Africa has already added Mandarin Chinese to the national curriculum, and there are 46 Confucius Institutes in over 30 countries across Africa.54 The benefits for China and Japan, and indeed, other countries employing similar methods to internationalise their student populations and workforce include an increase in soft power, alongside economic partnerships, human resource development and organizational and infrastructure capacity building in both the home and source countries.

## Use of English as a medium of instruction

Developing a range of courses taught in English continues to be a popular method of encouraging inbound students, with a recent Academic Cooperation Association report<sup>55</sup> discovering a rise of nearly tenfold in the number of degree programmes taught in English, in non-English speaking countries, since 2001. Approximately 8,100 courses were taught in English across a range of European countries in 2014, compared with 725

in 2001. The majority of English-taught courses in all countries are at the postgraduate level. Reported drivers for establishing these courses varied, with the Baltic States and Eastern Europe aiming to compensate for comparatively low numbers of domestic students, while northern European countries tend to focus on the benefits of improving English language abilities for domestic students. Nonetheless, students on English-taught

courses in the Baltics and South East Europe were likely to be domestic students (97% in Lithuania, 90% in Romania, 84% in Turkey), while international students choose more established providers in Poland, Belgium and Germany (51–54% international), indicating that while offering programmes in English has a wide range of benefits, it may not be a quick route to developing a more international student body.<sup>56</sup>







## Looking ahead: growing local capacity

The 2015 Trends report highlighted the growth of various programmes designed to encourage students to study abroad close to home, including, for example, regional credit transfer agreements, transnational degree programmes, encouraging students from neighbouring countries in Asia to study in other Asian countries, and the establishment of education hubs hosting a range of foreign university branches (most notably in Malaysia, Qatar and Singapore). The driver for much student mobility in developing countries remains lack of capacity at home, with fast growing populations outstripping the number of tertiary education places available in any given year. Those regions which have traditionally sent students to Western

universities are now quickly building domestic capacity, focusing on quality control and developing world-class teaching and research, and working with neighbouring countries to develop regional connections and a cohesive education policy.

This is showing dividends, with many universities across Asia and Latin America, and particularly in China, Japan and South Korea, climbing the league tables and developing research collaborations and teaching exchanges with world-leading institutions. In the *Universitas 21 Ranking of National Higher Education Systems 2016*, China was the most improved country, having gained 12 places over four years to be ranked 30th out of 50 national systems in the

2016 sample. Other countries making major improvements were Malaysia, Russia, Saudi Arabia, Singapore and South Africa.<sup>58</sup>

The OECD predicts that eight million students will study abroad by 2025, but the shape of this mobility continues to evolve. The combination of a growth in higher education capacity in the developing world with demographic changes leading to a smaller population of 18–24 year olds in many of the same countries makes it likely that regional capacity will meet demand in the 2020s, especially in Asia and Latin America. This could have potentially major implications for Western universities' ability to attract international students.<sup>59</sup>



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