

THE EAIIE BAROMETER

INTERNATIONALISATION IN EUROPE

Second edition

CONTENTS

**The EAIE Barometer: Internationalisation
in Europe (second edition)**

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DIVISION OF REGIONS

BASED ON UNITED NATIONS DEFINITIONS

Northern Europe	Eastern Europe	Southern Europe	Western Europe	Western Asia
Denmark	Belarus	Albania	Austria	Armenia
Estonia	Bulgaria	Andorra	Belgium (French Community)	Azerbaijan
Finland	Czech Republic	Bosnia and Herzegovina	Belgium (Flemish Community)	Cyprus
Iceland	Hungary	Croatia	France	Georgia
Ireland	Poland	Former Yugoslav Republic of Macedonia (FYROM)	Germany	Kazakhstan ¹
Latvia	Romania	Greece	Liechtenstein	Turkey
Lithuania	Russian Federation	Italy	Luxembourg	
Norway	Slovak Republic	Malta	Netherlands	
Sweden	Ukraine	Portugal	Switzerland	
United Kingdom		Slovenia		
		Spain		

-
1. Kazakhstan is part of Central Asia but for the purpose of this study it is included in Western Asia, as it is the only Central Asian country covered.

INTRODUCTION

The *EAIE Barometer: Internationalisation in Europe (second edition)* maps the form and function of internationalisation of higher education² in the EHEA, as viewed by practitioners working on the process at higher education institutions (HEIs) in Europe. Building on the knowledge gained from the first *EAIE Barometer* study conducted in spring 2014, this second edition addresses themes covered in the first study as well as several new and contemporary themes in internationalisation, in order to reflect on and better understand the field of international higher education.

In recent years, a number of new institutional internationalisation activities and processes have been developed, and HEIs in other regions around the world have begun to compete more actively with those in Europe and the Anglophone world. In Europe, institutions have effectively started working with the new European Union (EU) programmes for education and research, Erasmus+ and Horizon 2020. At the same time, national governments in a number of countries (including Poland and Spain) have introduced their first national internationalisation strategies, marking the increasing significance of internationalisation at the national level.

However, in some countries the number of international students – often noted as the central focus of internationalisation – seems to have reached saturation, challenging public perceptions of the benefits of internationalisation. For example, in the Netherlands the growing number of international students has raised concerns about the loss of the Dutch language in higher education and the pressure international students

2. For the purpose of this study, internationalisation of higher education is defined as: “the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society.” (De Wit, Hunter, Howard & Egron-Polak, 2015).

put on Dutch HEIs. The discourse in the country has shifted towards a more focused discussion about the many implications of the active pursuit of internationalisation of higher education in the country, including the potential issue of delivering programmes in English. There has also been a greater call for an increased focus on the quality and purposefulness of actions taken related to internationalisation.

Moreover, the traditional Western model founded on the hallmarks of open societies and free trade is increasingly under question. This is evident in a number of recent sociopolitical developments such as the rise of nationalistic and anti-international rhetoric. Examples include Brexit (the UK's vote to leave the EU in June 2016), the Turkish government's crackdown on academics and academic freedom following an attempted coup in July 2016, and the Hungarian government's threat to close its prominent foreign university (the Central European University) following changes to the country's National Higher Education law in April 2017.

For internationalisation to continue to add value to the higher education sector, and for decision-makers and the broader society to be convinced of its continued worth in these turbulent times, more useful and higher quality data is needed. The *EAIE Barometer* study fulfils this need by providing the largest and most geographically diverse set of data on internationalisation of higher education policies and practices ever undertaken in the EHEA.

This report is divided into five sections. Within each section, the analysis focuses on the aggregate EHEA results and compares results over time and by region, country and other subgroups of data, as appropriate. The sections are as follows:

- Section 1 – Internationalisation goals and priorities
- Section 2 – The internal environment: strategy, management and quality assurance
- Section 3 – Impact of the external environment: EU and national policies
- Section 4 – Challenges of internationalisation
- Section 5 – Looking back and planning ahead

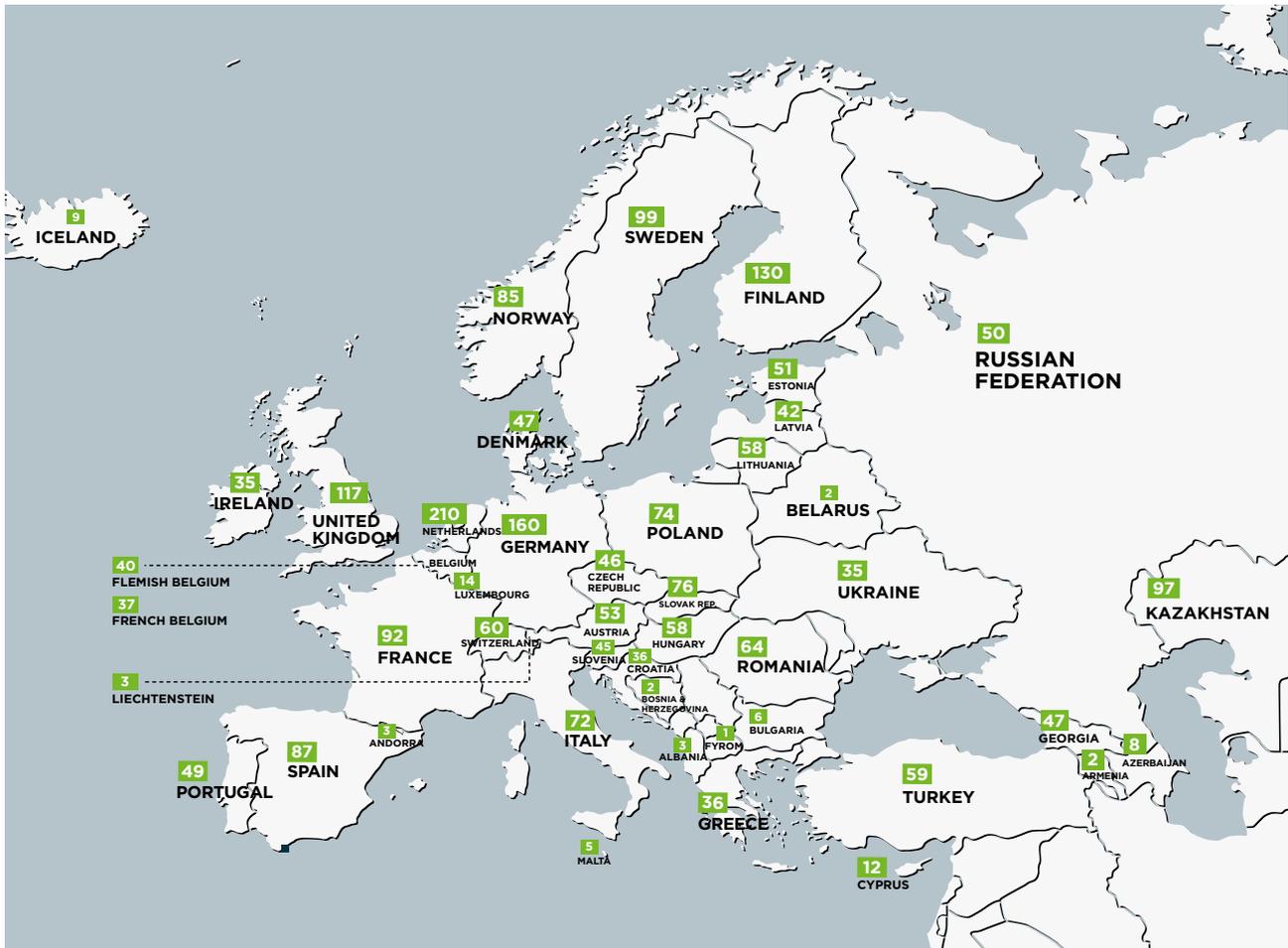
The study ends with reflections on the implications of the findings for the higher education sector in Europe.

RESPONDENTS

A total of 2317 individual respondents from 45 EHEA countries and 1292 unique institutions completed the *Barometer* survey. The highest number of survey respondents came from the Netherlands (9%, 210 respondents), Germany (7%, 160 respondents), Finland (6%, 130 respondents), the UK (5%, 117 respondents), and 4% each from Sweden (99 respondents), Kazakhstan (97 respondents), France (92 respondents), Spain (87 respondents) and Norway (85 respondents). Other countries represented in the survey each made up 3% or less of the respondents (Figure 1).

Figure 1

Geographical distribution of respondents ($n=2317$)



The coverage of HEIs per country represented by respondents varies greatly in the sample, ranging from all HEIs in Luxembourg and more than 90% of those in Finland, to less than 5% of the institutions in Russia and Ukraine.³ The results are hence skewed towards the education systems with high representation in the sample.

INSTITUTIONAL CHARACTERISTICS

The vast majority of respondents (80%) work at public institutions, while 14% work at private non-profit HEIs and a further 4% at private for-profit HEIs (Figure 2). These figures are comparable with the makeup of the European higher education landscape, with 70–95% of the tertiary students in the EHEA studying at public institutions (EHEA, 2015).

Figure 2

Respondents' institutional funding type (n=2062)

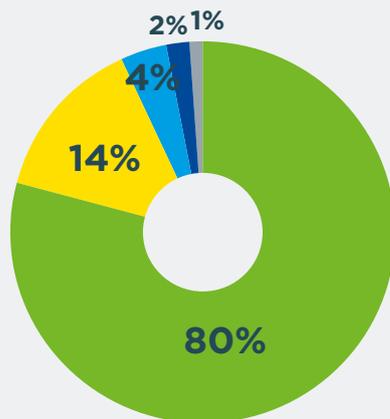
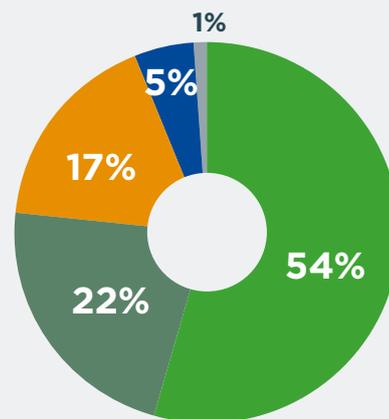


Figure 3

Respondents' institution type (n=2064)



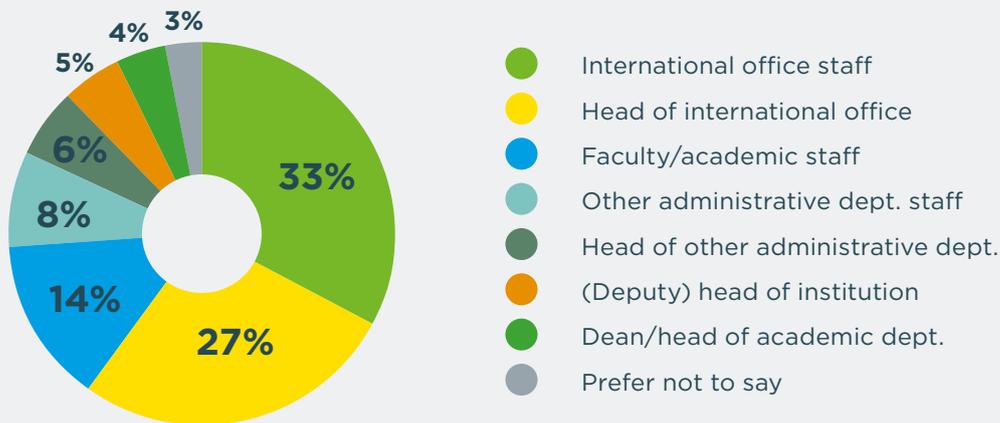
3. Data compiled from European Tertiary Education Register, National Centre for Public Accreditation, and Bolitho, R., & West, R. (2017).

Just over half of the respondents work for research universities (54%), slightly more than one fifth (22%) work for universities of applied sciences, and 17% for specialised HEIs (Figure 3).

Respondents also worked at HEIs of various sizes, with 33% at small HEIs (fewer than 5001 full-time equivalent [FTE] students), 35% at a medium-sized HEIs (5001–20,000 FTE students) and 27% at large HEIs (more than 20,000 FTE students). The number of international students at respondents' HEIs was equally varied. Up to 43% of the respondents reported small numbers of international students (fewer than 501 FTE international students) while 20% reported large international student numbers (more than 2000 FTE international students). Analysis shows that the number of international students correlated with the HEI's size, *ie* large HEIs reported higher international student numbers and *vice versa*.

INDIVIDUAL CHARACTERISTICS

The vast majority of respondents indicated that they worked full-time on internationalisation (70%). Indeed, the majority worked in their HEI's international office either as staff member (33%) or the head of office (27%). Close to one fifth identified themselves as faculty, with 14% as members of academic staff and 4% as deans/heads of academic departments. Around one in seven worked in other administrative departments (8% staff members and 6% heads). A small minority indicated they were heads or deputy heads of institution (5%; Figure 4).

Figure 4**Position of respondents (n=2046)**

The majority of the respondents (58%) indicated that they worked at the central level in their HEI, with slightly more than one third on the faculty level (35%). Only a small number of respondents indicated that they worked in a delegation or study programme abroad (4%) or branch campus (1%). The level of experience in the field within the sample varied from 36% having fewer than five years of experience to 22% having over 15 years of experience.

For more detailed information on how this survey was conducted, please see the [Methodology](#).

SECTION 1

Internationalisation goals and priorities

It is widely accepted that internationalisation has a number of potential benefits for students, the institution and society as a whole. To realise its full potential, internationalisation needs to be managed effectively across the institution. In order to do so, institutions should seek to understand their environment, develop a strategic approach and optimise implementation of internationalisation, as well as monitor and evaluate the process (OECD, 2012). This section analyses how institutions are taking a strategic approach to internationalisation by developing goals and related strategic priority activities.

INTERNATIONALISATION GOALS

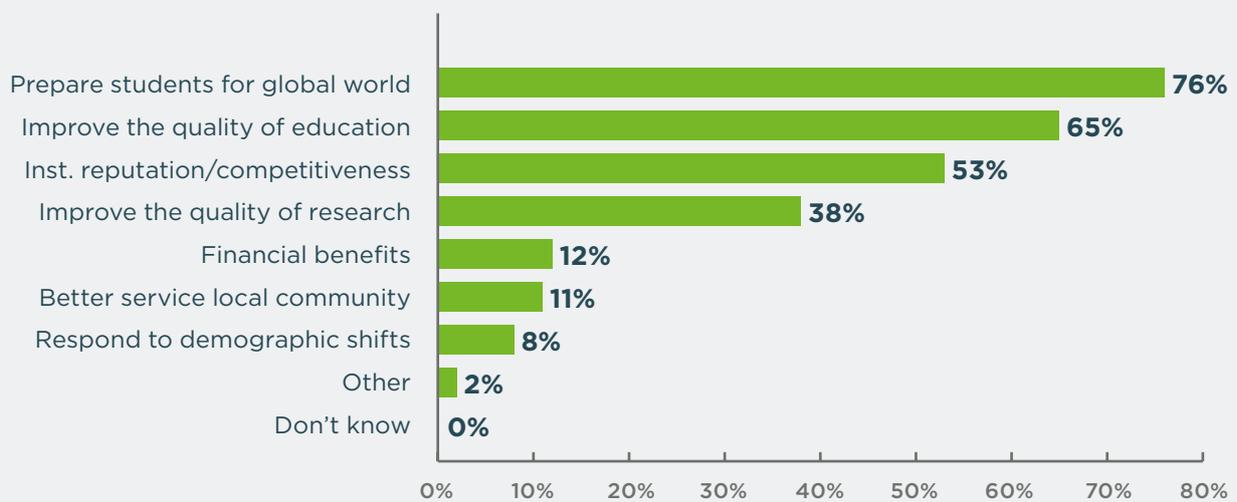
Framing and understanding the institutional goals of the process are essential for any HEI seeking to advance internationalisation, as they allow the organisation to take a holistic approach to internationalisation (Knight, 2012). When respondents were asked about the main goals of internationalisation for their HEI, it is interesting to note that preparing students for a globalised world and enhancing their employability (76%) as well as improving the quality of education (65%) stood out as the most commonly cited (Figure 5). It is important to highlight that within a number of HEIs these goals are likely linked. One would envision, for example, that an HEI aim to improve the quality of its education in order to better prepare their students for a globalised world.

It is also surprising to note that comparatively few respondents answered that their institution regarded improving the quality of research as one of their main goals of

internationalisation (38%). This figure rose to 46% from respondents at research universities. Interestingly, academic staff were not significantly more likely than other staff groups to report this as a main goal. This could be an indication of a number of things, including the fact that research – by its very nature – is international in focus and is therefore perhaps not seen as needing to be a key goal of internationalisation for institutions to pursue.

Figure 5

Main goals of internationalisation* (n=2317)



* Respondents were able to select up to three answers

Despite ongoing discussions about the increased commercialisation of internationalisation, only 12% of respondents indicated financial benefits as one of the main goals of internationalisation. This finding is also perhaps surprising, considering that 53% of respondents indicated international student recruitment – an activity that has significant potential financial benefits to HEIs in a number of European countries – is a priority internationalisation activity in their HEI (see Figure 7).

When comparing responses by institutional types, it is also clear that respondents working at universities of applied sciences were more likely to note preparing students for a globalised world (87%) and better servicing local community (18%) as one of their HEI's key goals, than those working at other institutional types. Unsurprisingly, respondents at for-profit HEIs were more likely to internationalise for financial benefits (18%).

Change over time

When comparing the results of the first and second editions of the *EAIE Barometer*, it is clear that preparing students for a globalised world has become a more important goal of internationalisation over time. In the first edition of the study, respondents detailed that the top three reasons for their HEI to internationalise were improving the overall quality of education (56%), preparing students for a globalised world (45%) and attracting more international students (37%).

Regional results

It is illuminating to know how stakeholders from different countries and regions in the EHEA conceive of internationalisation differently. For example, the number of respondents who selected preparing students for a globalised world and enhancing student employability as an important internationalisation goal at their HEI rose to 90% in Western Europe. At the same time, improving the quality of education was the most commonly selected goal among Western Asian respondents (73%; Figure 6).

Figure 6

Main goals of internationalisation by region* (n=2317)

	EHEA	Northern Europe	Eastern Europe	Southern Europe	Western Europe	Western Asia
Prepare students for global world	76%	76%	62%	76%	90%	63%
Improve the quality of education	65%	63%	61%	62%	68%	73%
Inst. reputation/competitiveness	53%	47%	63%	62%	46%	55%
Improve the quality of research	38%	38%	40%	38%	34%	42%
Financial benefits	12%	18%	17%	14%	5%	5%
Better service local community	11%	10%	9%	12%	13%	7%
Respond to demographic shifts	8%	9%	9%	6%	8%	0%
Other	2%	1%	1%	1%	3%	1%
Don't know	0%	0%	1%	1%	0%	0%

● 1st ● 2nd ● 3rd

* Respondents were able to select up to three answers

Even larger differences were noticeable when comparing results by countries. For example, 89% of the Slovenian respondents noted that their HEI saw improving the quality of education as one of the main goals of internationalisation. However, only 38% of the respondents from HEIs in Italy and the UK respectively cited this as one of their main goals. Similarly, only 23% of the respondents from Denmark noted improving institutional reputation or competitiveness as one of their main goals, whereas this figure was as high as 76% among respondents from Russian HEIs. Respondents reporting that their institutions internationalise for financial gains came primarily from Ireland (69%), the UK (42%) and Hungary (36%).

INTERNATIONALISATION ACTIVITIES

To gain a better understanding of how HEIs in Europe act on internationalisation, respondents were asked to detail the internationalisation activities pursued at their HEI. It is clear that respondents perceive that their HEIs take a broad approach to internationalisation. Over a third of the respondents (36%) reported that their HEI was undertaking more than ten types of internationalisation activities (Figure 7).

The number of activities undertaken appears to correlate well with the size of the institution. Large HEIs (with more than 20,000 FTE students) were more likely than smaller HEIs to undertake more than 10 activities (51%). It is equally important to note too, that the number of activities reported varied by the position that the respondents held within their institution. Overall, faculty reported fewer types of internationalisation activities being pursued at their HEI than were reported by other types of staff, with only 26% of heads of academic departments and 25% of academic staff listing more than 10 internationalisation activities.

The internationalisation activity most commonly reported as being undertaken at respondents' HEIs was for international mobility opportunities for home students (90%), followed by international mobility opportunities for home faculty/staff (84%) and international student recruitment (76%). Respondents reported that their HEIs were less likely to pursue internationalisation activities supporting their 'third mission'.⁴ This is evidenced by the fact that engagement with local community and society on international issues and capacity building in developing countries were the

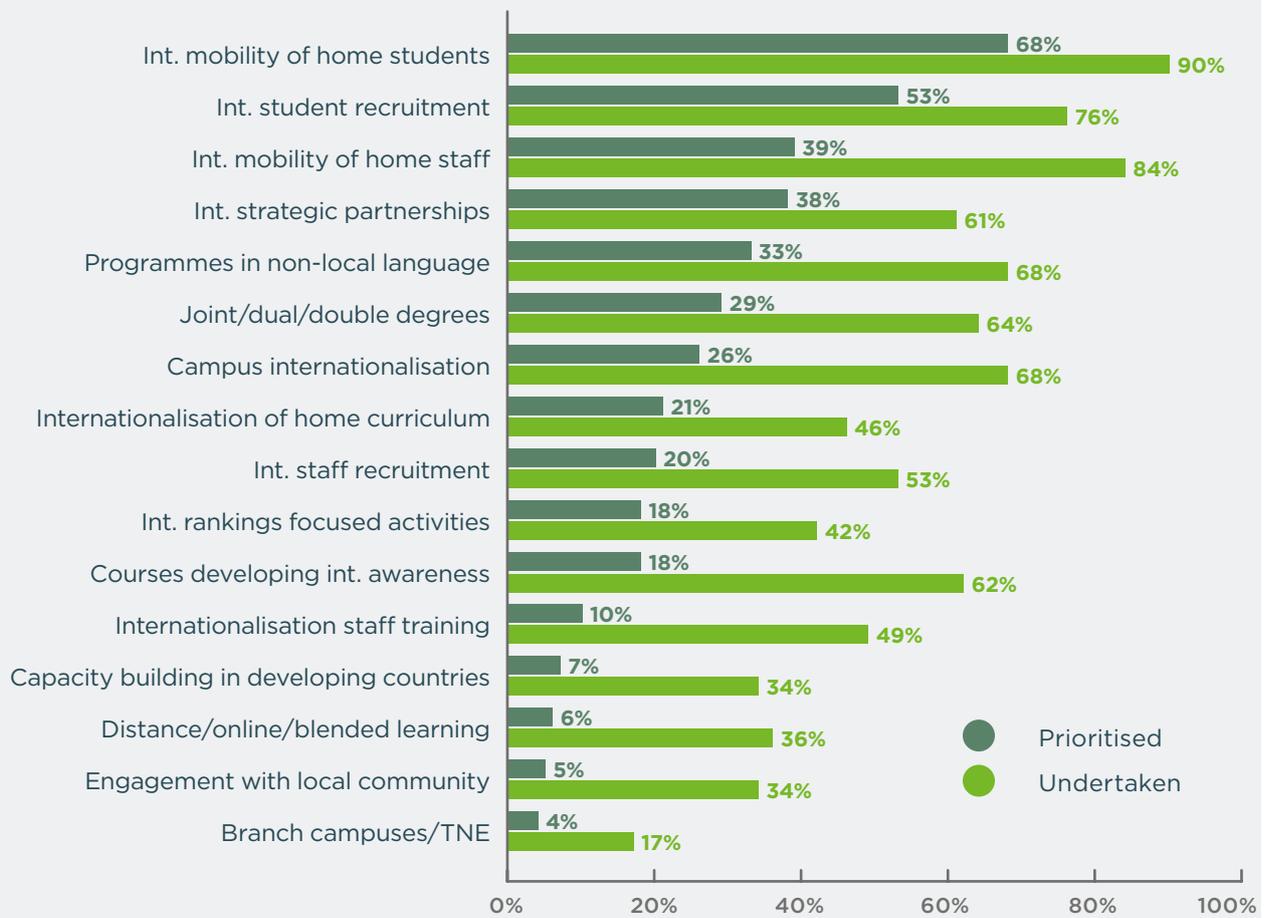
second and third least commonly noted institutional internationalisation activities (34% in both cases). It is clear when comparing the results of the first and second editions of the *EAIE Barometer*, that student mobility was – and still is – a centrally important feature of internationalisation of higher education at HEIs in the EHEA.

STRATEGIC PRIORITY ACTIVITIES

In order to gain a better understanding of the key areas of internationalisation that HEIs focus on, respondents were asked to indicate up to five activities prioritised in their HEI's internationalisation strategy. In conjunction with the results related to activities undertaken, an analysis of the data related to activities prioritised in HEIs' strategies shows that the institutions' internationalisation efforts clearly have a strong and continued focus on student mobility and student recruitment. For example, the most common priority activity in respondents' HEIs was international mobility opportunities for home students (68%), followed by international student recruitment (53%; Figure 7). International mobility opportunities for home faculty/staff (39%) and international strategic partnership building (38%) followed as the third and fourth most commonly prioritised activities.

It is clear that fewer respondents reported that their HEIs prioritised activities related to internationalisation at home, either through internationalising the home curriculum (21%) or the campus experience (26%). The least commonly prioritised activity was branch campuses and other transnational education (TNE) activities, which was noted as a priority by only 4% of the respondents. In a European regional climate of diminished public funding for higher education, this is perhaps a consequence of the large costs involved in such activities.

It is interesting to note as well, that comparably few respondents' HEIs prioritise engagement with local community and society on international issues (5%). This is perhaps a particularly important finding, given that recent rhetoric in the sector has underlined the need for HEIs to develop better approaches to engage with their local communities on international issues when responding to the rise of right-wing and anti-international sentiment in society.

Figure 7
**Internationalisation activities prioritised in strategy* (n=1917)
and activities undertaken** (n=2317)**


* Respondents were able to select up to five answers

** Respondents were able to select multiple answers

When comparing activities prioritised in institutional strategies by the type of HEI, some interesting differences become apparent. For example, respondents from universities of applied sciences indicated that their HEIs were more likely to focus on internationalisation of the home curriculum (33%) as well as courses and activities developing students' international awareness and intercultural competences (31%). In contrast, respondents from research universities indicated their HEIs were more likely than other HEI types to prioritise international student recruitment (58%). Perhaps therefore they were also somewhat more likely to prioritise programmes in non-local languages (36%).

The internationalisation activities reported by respondents as being priorities also varied, depending on their professional role. Heads of international offices more often detailed international mobility of home students (76%) and international mobility of home staff (48%) as strategic priority activities, whereas heads of other administrative departments more often cited international student recruitment (71%). Academic staff more often reported courses developing students' intercultural awareness (28%) as priority activities. It appears as though professionals were more prone to view internationalisation activities in their own area of responsibility as institutional priorities.

Change over time

In the first edition of the *EAIE Barometer*, respondents detailed international outgoing student mobility (84%), international incoming student mobility (84%) and international strategic partnerships (79%) as the three most common areas of internationalisation covered by their HEIs' internationalisation strategies. When compared with the data collected in this study, it is clear that mobility – and in particular student mobility – was, and still is, the most centrally important feature of strategic internationalisation activities within HEIs in the EHEA.

Regional results

Analysis of the regional results shows that even though the broad trends indicated above are similar across the geographic regions of respondents, there are some noteworthy differences in priorities (Figure 8). For example, 76% of the respondents working in HEIs in Southern Europe indicated international mobility opportunities for home students as an institutional priority activity, whereas this figure fell to 61% in Eastern Europe. In addition, higher numbers of respondents from HEIs in Western Europe indicated internationalisation of the campus support services and the home curriculum (34% in both cases) as strategic priorities, when compared to their peers in other regions.

Figure 8**Top 10 internationalisation activities prioritised in strategy by region***
(n=1917)

	EHEA	Northern Europe	Eastern Europe	Southern Europe	Western Europe	Western Asia
Int. mobility of home students	68%	67%	61%	76%	70%	68%
Int. student recruitment	53%	63%	62%	50%	41%	44%
Int. mobility of home staff	39%	38%	47%	49%	28%	51%
Int. strategic partnerships	38%	44%	28%	31%	43%	30%
Programmes in non-local language	33%	32%	46%	33%	32%	19%
Joint/dual/double degrees	29%	22%	31%	34%	29%	38%
Campus internationalisation	26%	25%	22%	22%	34%	18%
Internationalisation of home curriculum	21%	20%	13%	14%	34%	10%
Int. staff recruitment	20%	28%	21%	13%	14%	23%
Int. rankings focused activities	18%	16%	25%	22%	12%	23%
Courses developing int. awareness	18%	16%	10%	10%	28%	18%

● 1st ● 2nd ● 3rd ● 4th ● 5th

* Respondents were able to select up to five answers

When comparing results by respondent's country, some distinct differences are apparent. For example, 28% of the UK respondents indicated their HEIs prioritise branch campuses and other TNE activities. However, this was not noted as a priority activity by a single respondent in 14 other EHEA countries. Furthermore, 30% of the Norwegian respondents indicated that capacity building in developing countries was a prioritised activity in their HEI, compared to no respondents in six EHEA countries.

INTERNATIONALISING ACCORDING TO THE GOALS

Are HEIs paying lip service to their stated goals for internationalisation or are they internationalising in accordance with their goals? Despite the different goals for internationalisation, respondents' HEIs do seem to prioritise relatively similar activities

within their internationalisation strategies. Analysis reveals that irrespective of HEIs' main goals, respondents note international student mobility as the top priority activity in their HEIs' internationalisation strategies, followed by international student recruitment. The only exception is in HEIs where financial benefits or responding to demographic shifts are indicated as the main goal. At these HEIs, the order of the two top priorities is reversed.

Respondents from HEIs that hold financial benefits as the key goal stand out most in the sample. They are also more likely to prioritise branch campuses and other TNE activities (10%) and less likely to internationalise their campus (19%) or prioritise courses and activities developing students' international awareness and intercultural competence (10%). Within the sample, there are some further discernible differences in the priorities emphasised, indicating a more goals-oriented approach to internationalising. For example, analysis of the data shows that those respondents from HEIs pursuing internationalisation with the main goal of responding to demographic shifts were more likely than respondents from other HEIs to indicate that their institution offered programmes in a non-local language (51%). Respondents from HEIs pursuing internationalisation with the goal of increasing the quality of research were the most likely to indicate that their institution prioritised international faculty and staff recruitment (28%).

-
4. Alongside undertaking teaching and research, a university's 'third mission' is defined as the work it undertakes to 'transfer knowledge' into the economy and wider society.

SECTION 1: KEY FINDINGS

- Preparing students for a globalised world/enhancing their employability and improving the quality of education were the most commonly noted goals of internationalisation at respondents' HEIs.
- Whilst it is perhaps to be expected, financial benefits was rarely selected as a key goal of internationalisation, apart from by respondents working at HEIs in Ireland, the UK and Hungary.
- International mobility opportunities for home students and international student recruitment are the most commonly prioritised activities within the institutional internationalisation strategies of respondents' HEIs.
- In the majority of cases, respondents' HEIs prioritise very similar internationalisation activities, irrespective of their goals for the process.

SECTION 2

The internal environment: strategy, management and quality assurance

In order for HEIs to achieve their internationalisation goals, they must have the appropriate support structures and resources in place. This section will examine some of the mechanisms HEIs use to further enhance their strategic approach to internationalisation, as well as optimise implementation and tackle the evaluation and assessment of related activities.

INTERNATIONALISING STRATEGY

The vast majority of respondents reported that their HEI had either a standalone institution-wide internationalisation strategy or that internationalisation was a priority area covered in the overall institutional strategy (39% each; Figure 9). It is worth noting that 7% of respondents did not know whether their HEI had an internationalisation strategy. In particular, academic staff (16%) and staff working in other administrative departments (12%) were unaware of the existence of such strategies. This appears to indicate that a number of the respondents' HEIs have not effectively involved all relevant staff groups in their pursuit of internationalisation.

Respondents from specialised HEIs (15%) and from small HEIs (with under 5001 FTE students; 13%) were more likely to state that their institution was still in the process of developing an internationalisation strategy. Analysis of the results also shows that respondents working at public HEIs (41%) were more likely than their peers at private non-profit (34%) and private for-profit HEIs (26%) to work with a standalone internationalisation strategy. It is, however, important to note here that

Figure 9**Presence of internationalisation strategy (n=2317)**

the differences reflected in this data could also indicate that respondents from public HEIs may be better aware of their institution's internationalisation strategy than respondents from other types of HEIs.

Change over time

In the first edition of the *EAIE Barometer*, 46% of respondents reported that internationalisation was one of the priority areas addressed in the overall institutional strategy. When compared to the data collected in the second edition, it becomes clear that the proportion of respondents' HEIs who prioritise internationalisation within the overall institutional strategy has fallen from 46% in the first edition to 39% in this edition. Furthermore, in the first edition an additional 38% of respondents detailed that their HEI had a separate strategic plan for internationalisation, whilst 11% indicated that an internationalisation strategy was under development. The number of respondents indicating that their HEIs were internationalising without strategic direction has remained the same (3%).

Regional results

Overall, a regional comparison of the results follows a broadly similar pattern to the whole sample results. For example, in all regions, over 80% of the respondents reported working with a strategy in some form. However, respondents from HEIs in Western Europe (48%) were more likely to note that their institution had a standalone

institution-wide internationalisation strategy than respondents from HEIs in other regions. Respondents from HEIs in Northern Europe were more likely to note internationalisation as part of the overall institutional strategy (49%).

Analysis of the findings by country of respondent reveals more pronounced differences in how internationalisation strategies are developed. For example, 63% of the Romanian respondents stated that their HEI had a standalone institution-wide strategy for internationalisation, while only 21% of the Finnish respondents reported that this was the case. Austria (9%) and Croatia (8%) recorded the highest percentages of respondents with no internationalisation strategy.

Strengthening the strategy

Analysis of the survey data shows that in most instances, the activities noted by respondents as being priorities within their HEIs' internationalisation strategies did have specific targets attached to them. Targets were most commonly set for international student recruitment (80%) and international mobility opportunities for home students (78%), as well as programmes in non-local languages and rankings-related activities (both 73%). Targets were least likely to be set for engagement with local community on international issues, capacity building in developing countries (57% each) and internationalisation of the curriculum (59%). Based on the answers provided by the respondents, it seems that HEIs are more likely to set targets for activities that are easily quantifiable.

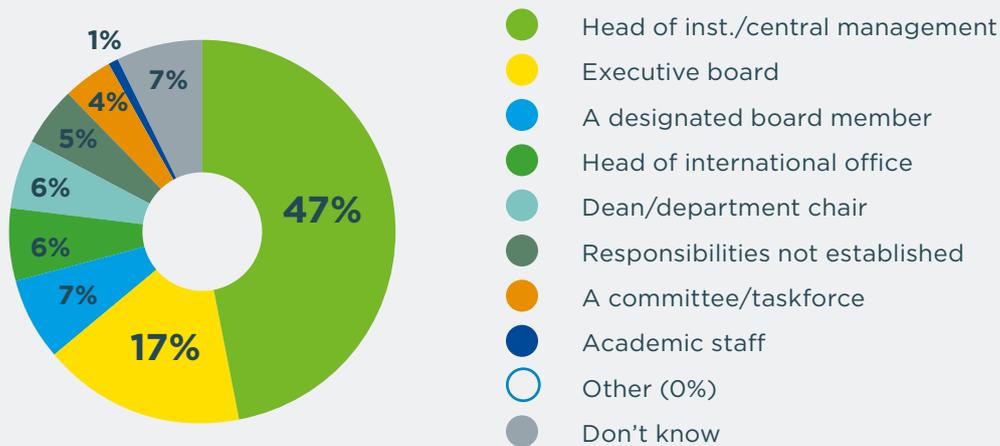
In addition, most respondents working at HEIs with some form of internationalisation strategy indicated that either some (57%) or all (21%) of the strategic priority activities had funding allocated. Furthermore, two thirds of the respondents indicated that their HEI's internationalisation strategy was formally evaluated. As such, this shows that HEIs' internationalisation strategies often have concrete targets attached to them, thereby enhancing the effective implementation of internationalisation. Yet there seems to be room for improvement in ensuring resource allocation to all strategic priorities and in incorporating regular evaluation into the strategy cycle.

MANAGEMENT AND ORGANISATION

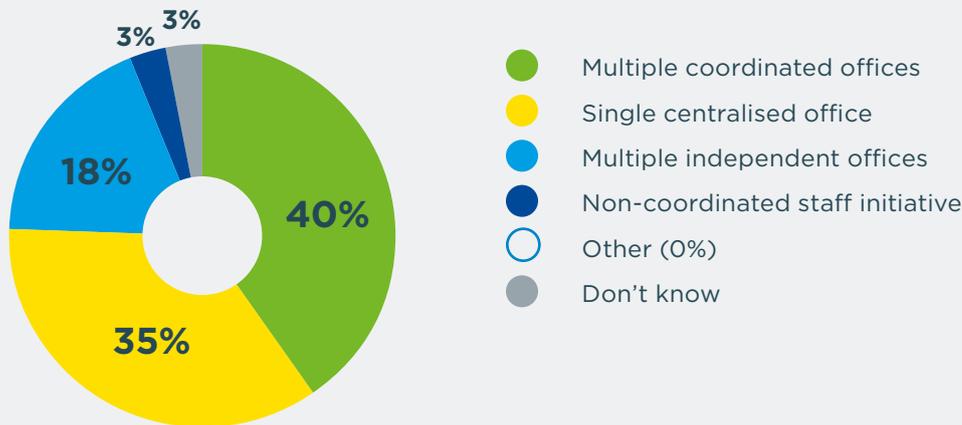
The central importance attributed to internationalisation at HEIs is evidenced by the fact that 71% of respondents indicated that either the head of institution/central management, the executive board, or a designated board member for internationalisation had the final responsibility for decision-making on internationalisation at their HEI. Only at 5% of the respondents' HEIs was the responsibility for internationalisation not formally established. A further 7% did not know who had the final responsibility (Figure 10).

Figure 10

Responsibility for decision-making on internationalisation ($n=2317$)



According to the respondents, the most common way to organise the implementation of internationalisation was through multiple offices/teams working in coordination (40%), followed by a single centralised office/team (35%). Only 3% of respondents noted that internationalisation at their HEI rested on the non-coordinated initiative of individual employees (Figure 11).

Figure 11**Organisation of internationalisation (n=2302)**

Respondents from research universities were more likely to have multiple teams working in coordination (45%), while those from universities of applied sciences and specialised HEIs were more likely to have a single centralised office (40% and 44% respectively). As with the internationalisation strategy, members of academic staff were more likely than other staff groups to report that they did not know how internationalisation was organised at their HEI (8%).

Change over time

When comparing the data collected in the two editions of the *EAIE Barometer*, patterns of change are apparent in the management and organisation of internationalisation within HEIs in the EHEA. For example, in the first edition of the study, 46% of respondents detailed that the board or central management had the main responsibility for the internationalisation strategy within their HEI. Although the question asked in the first edition of the *Barometer* was slightly different, this compares with the 64% of respondents to this edition of the study who detailed that either the board or the head of institution/central institutional management had the final responsibility for decision-making on internationalisation at their HEIs. This could reflect a moving of responsibility for internationalisation to more senior management.

At the same time, it appears that HEIs in the EHEA are moving away from a centralised model with a single international office and towards a more decentralised model with multiple offices working together. In the first edition of the *EAIE Barometer*, 51% of the survey respondents stated that their HEI had a single international office, a figure that dropped to 35% in the second edition. This can be seen as evidence of the increased mainstreaming of internationalisation within respondents' HEIs, *ie* delegating tasks traditionally ascribed to the international office to other departments in the institution. This development, combined with the data showing that standalone internationalisation strategies have become a slightly more common feature of internationalisation policymaking in HEIs, suggests that policymaking and policy implementation on the process are now being separated and conducted in different parts of institutions.

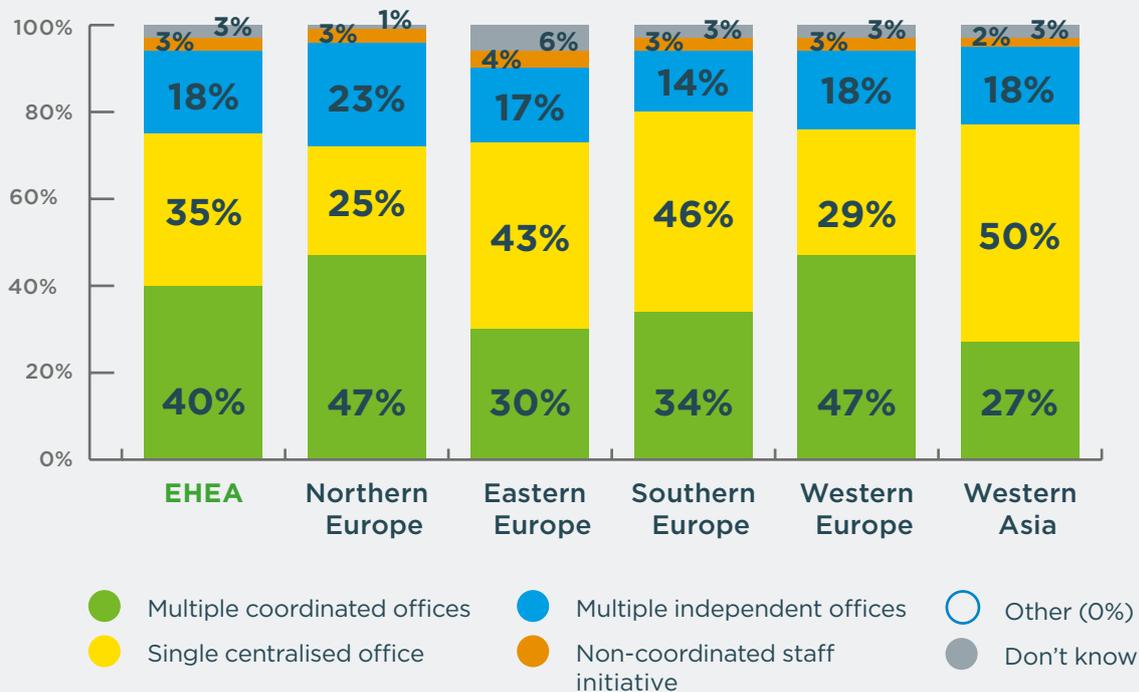
Regional results

Some regional differences are discernible in an analysis of the data related to decision-making structures for internationalisation. For example, it is more common for the head of the institution to have the final responsibility for internationalisation in respondents' HEIs in Western Asia (64%), whereas the executive board had the final say at 25% of the respondents' HEIs in Western Europe. The head of the international office was more likely to have the final responsibility in Eastern Europe (9%), but this appeared to be the exception rather than the rule.

A clear regional division is noticeable in the organisation of internationalisation. Respondents from Northern and Western Europe were more likely to note that their HEI had multiple offices working in coordination (47% each). Respondents from Western Asia (50%), Southern Europe (46%) and Eastern Europe (43%) were more likely to state that their HEI had a single, centralised team (Figure 12).

Figure 12

Organisation of internationalisation by region (n=2302)



TRAINING ON INTERNATIONALISATION

The vast majority of respondents detailed that their HEI did make some in-house or external training programmes on internationalisation available to faculty or staff. Indeed, only 5% of respondents stated that their HEI did not offer any such programmes. Irrespective of the activities prioritised in the strategy, the most frequently offered training programmes were English language training (62%) and attending internationalisation conferences (59%). It is also interesting to note that the data shows that some of the respondents' HEIs did take a more strategic approach to their training offering, *ie* offering training related to the activities prioritised. For example, English language training was offered more often by respondents' HEIs that were prioritising programmes in a non-local language (75%). Courses in teaching methodologies for the international classroom were more common at respondents' HEIs that were prioritising internationalisation of the curriculum (38%).

QUALITY ASSURANCE

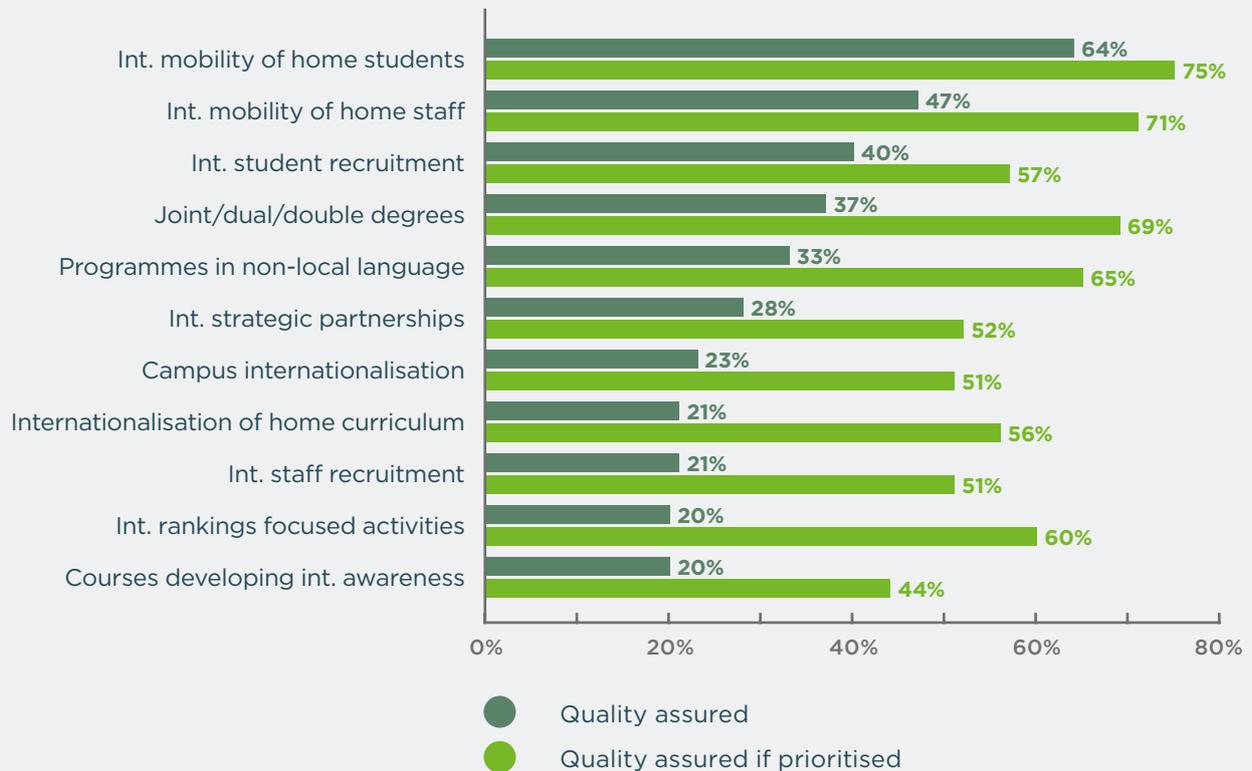
In total, 53% of respondents indicated that their HEI had a formalised internal quality assurance system for internationalisation activities, with quality being assessed either systematically (33%) or on an ad hoc basis (20%). A quarter of the respondents detailed that the quality of internationalisation activities was not formally assessed at their HEI. It is also interesting to note the remaining 22% were unaware of any quality assessment activities. It is clear that an awareness of institutional quality assurance efforts has not penetrated the entire HEI, with academic staff (35%) and staff members in other administrative departments (39%) often citing no knowledge of the existence of such efforts.

Respondents noted that the most commonly assessed activities in their HEIs' internal quality assurance systems were international mobility opportunities for home students (64%) and for home staff (47%), as well as international student recruitment (40%). It is encouraging that the activities most commonly assessed align well with the activities given the highest strategic priority, which appears to indicate that quality assurance is often regarded as an integral and strategic part of the HEI's internationalisation efforts. Indeed, HEIs that prioritise a given activity in the internationalisation strategy are more likely to assess its quality (Figure 13).

It is noteworthy that of the respondents citing improving the quality of education as their HEI's main goal for internationalisation, only 54% reported that they had an internal quality assurance mechanism, only one percentage point more than the sample average. It is well understood that properly assessing the quality of internationalisation activities is often challenging. It is a different process than evaluating whether a particular activity has achieved its numeric targets. Quality of internationalisation activities can in certain circumstances also be assessed through an external system, for example. Yet, it seems plausible that there are HEIs who claim to pursue internationalisation in the name of quality enhancement, without taking steps to ensure they are properly living up to this in practice.

Figure 13

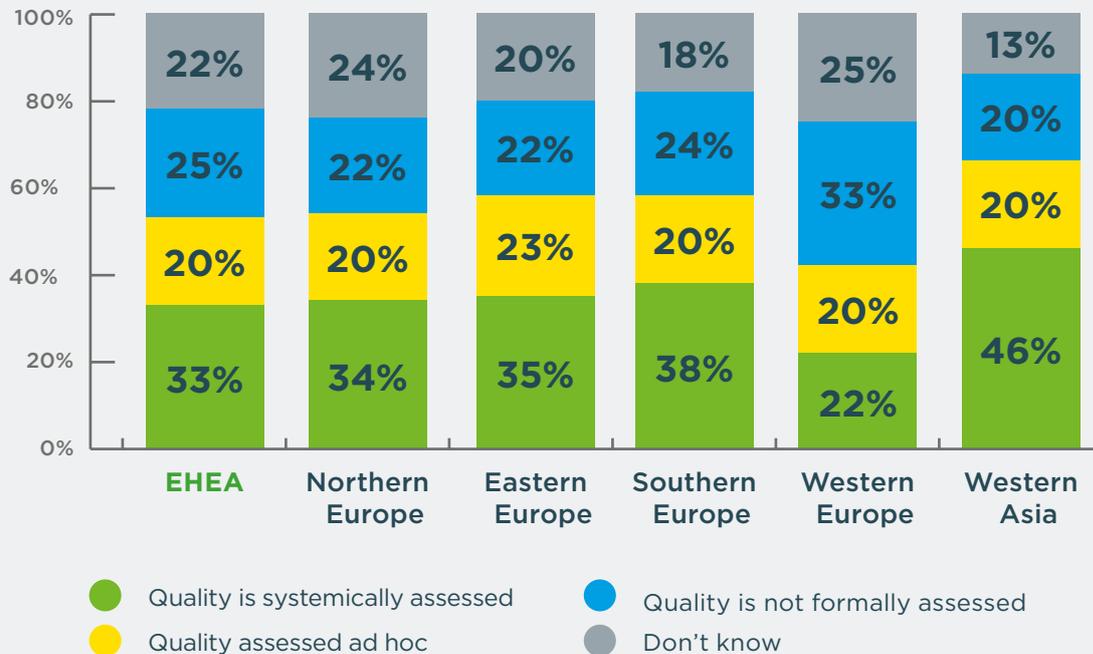
Top 10 activities assessed through internal quality assurance system and activities that are quality assessed if prioritised in strategy* (n=1166)



* Respondents were able to select multiple answers

Regional results

Some interesting findings become apparent when comparing regional results on quality assurance. This is particularly the case for Western Europe, where only 42% of the respondents indicated that quality was assessed internally in their HEI, compared to over 50% of respondents in all other regions, and as many as 66% in Western Asia (Figure 14). Respondents from Latvia (73%) and Georgia (72%) were the most likely to report the existence of an internal quality assurance system. Respondents from Germany (49%) and France (43%) were most likely to convey that they did not have such a system in place at their HEI.

Figure 14Prevalence of internal quality assurance system by region ($n=2232$)

SECTION 2: KEY FINDINGS

- The vast majority of respondents' HEIs had either a standalone internationalisation strategy or internationalisation was prioritised in their overall institutional strategy.
- The head of institution or the executive board most often had the final responsibility for decision-making on internationalisation.
- The most common organisation of internationalisation within respondents' HEIs was multiple offices working in coordination, followed by a single centralised office.
- The majority of respondents noted that their HEI had a formalised internal quality assessment system for internationalisation, in which they most frequently assessed international student and staff mobility and student recruitment activities.
- English language training and attending internationalisation conferences were the two training programmes on internationalisation most frequently offered at respondents' HEIs.

SECTION 3

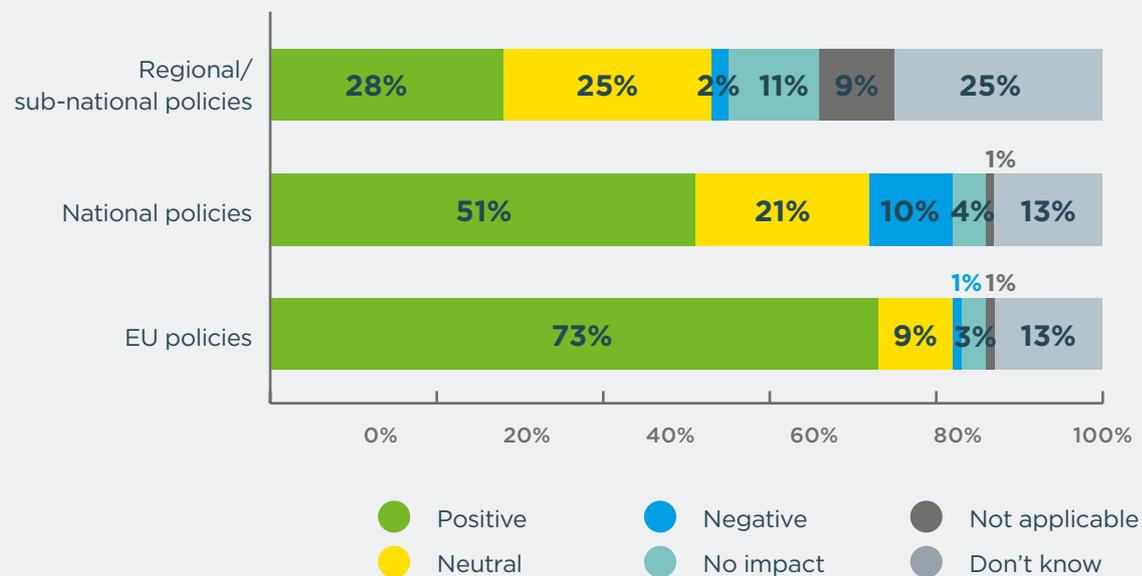
Impact of the external environment: EU and national policies

HEIs do not internationalise in a vacuum, but are supported or constrained by actors and processes beyond the institution, at the regional, national and supranational level (De Wit *et al*, 2015). In order to better understand the forces influencing internationalisation at the institutional level, the survey asked respondents about the impact of EU, national and regional policies on internationalisation at their HEIs.

Results show that the EU-level policies clearly had the highest positive impact on internationalisation at the respondents' HEIs (73%), while the national level was positively viewed by half of the respondents (51%). Overall, regional (subnational) policies appeared to affect respondents' HEIs significantly less (Figure 15).

Change over time

The first edition of the *EAIE Barometer* also sought to analyse the impact and influence of different policy levels on internationalisation within respondents' HEIs. What is noticeable when comparing the results of the two studies is that a very similar proportion of respondents cite "no impact". In the first edition, 3% of respondents indicated their HEI was not affected by EU-level policies, 2% were not affected by the national level, and a total of 13% were not affected by the regional level. These findings are similar to the data collected in the second edition of the study.

Figure 15**Impact of policy levels on internationalisation at respondents' HEIs (*n*=2198)**

EU POLICIES

The EU level had a highly positive impact on internationalisation across the sample, with only a small fraction of respondents (1%) indicating a negative impact. Of the EU programmes, Erasmus+ was noted as having the most positive effect on internationalisation at respondents' HEIs, with an overwhelming 96% of respondents reporting this. This indicates that despite its challenges, the Erasmus+ programme is seen to support internationalisation both within and beyond the EU member states. There seems to be lower awareness of the impact of Horizon 2020 among those surveyed. Almost one in five (18%) did not know what impact the programme had on internationalisation at their HEI. Interestingly, heads of institutions were more positive than other respondent groups to the impact of Horizon 2020, with 72% reporting a positive impact on internationalisation. Perhaps this indicates that research funding traditionally falls outside the remit of the international officers and the main group surveyed.

Some variations can be noted in the impact of EU policies across different types of HEIs. For example, respondents working at private for-profit HEIs were somewhat more likely to feel that EU policies had no impact (8%). Respondents from small HEIs

were marginally more positive about the impact of EU policies (76%) than those at other HEIs. Overall, the differences were mostly minor. Similarly, the perceptions of the impact of EU policies varied between respondents holding different roles. Overall, the head of the international office was most positive about the impact of EU-level policies (80%).

Regional results

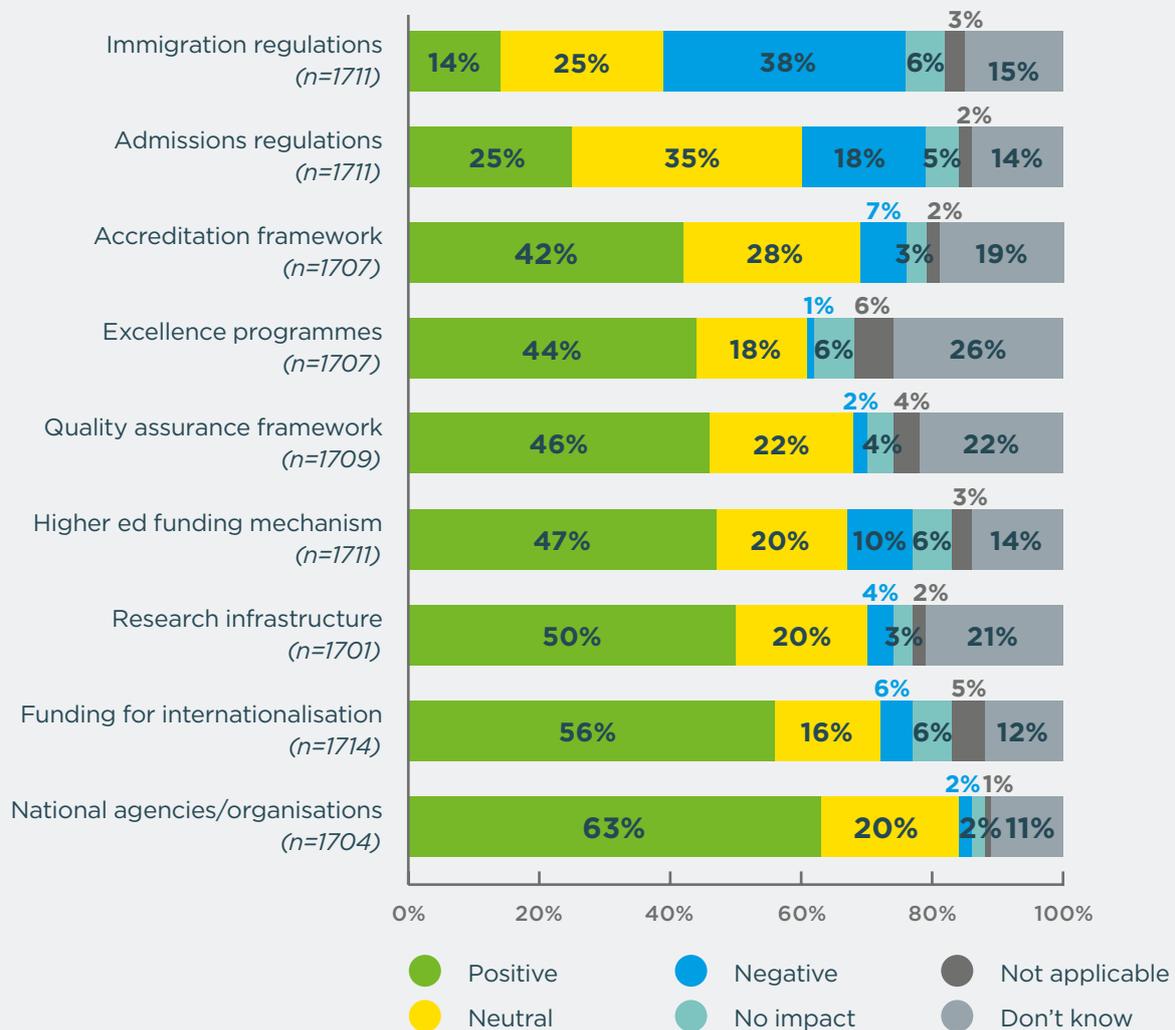
When comparing results by respondent's country, respondents from Latvia, Lithuania and Portugal were the most positive about the impact of EU policies on their HEIs' internationalisation efforts, with more than 90% of the respondents in all three countries reporting a positive influence. However, the lowest number of respondents citing a positive impact can be found in Western Europe (64%), which is made up entirely of EU member states (with the exceptions of Switzerland and Liechtenstein). However, both the Erasmus+ and Horizon 2020 programmes are open to participants from most of the non-EU countries in the sample studied, thus expanding the influence of EU policies beyond the EU28. Swiss respondents report the least positive impact in the entire sample (38%). In light of Switzerland having been demoted to a partner country of the Erasmus+ programme, these findings are perhaps hardly surprising.

NATIONAL POLICIES

The results show that slightly more than half of those surveyed (51%) considered national policies to have a positive impact on internationalisation at their HEI, while 10% considered these policies to have a negative impact, and 13% were unaware of their impact. National governments commonly undertake a breadth of activities to regulate and enhance internationalisation. The respondents were most positive about the impact of national agencies (63%), financial support for internationalisation activities (56%) and the national research infrastructure (50%). Immigration regulations were seen as having the most negative impact on internationalisation efforts at respondents' HEIs (38%), followed by admissions regulations (18%; Figure 16).

Figure 16

Impact of national policies on internationalisation at respondents' HEIs



The differences between respondents' HEI types are noteworthy. Staff at public HEIs held a more favourable view of the impact of national policies on internationalisation at their HEI (54%) than those working at privately-funded HEIs (private non-profit 43% and private for-profit 40%). In many countries, national governments have more resources at their disposal to influence publicly-funded HEIs. National policies appeared to have the strongest positive impact at those respondents' HEIs prioritising capacity building (66%) and engagement with local communities (63%). As with EU policies, the heads of international offices were the most positive about the impact of the national level (56%).

Country results

Analysing results by country shows that while the respondents in the majority of countries reported similar results, considerably higher proportions of respondents from HEIs in Denmark (66%) and the UK (45%) cited a negative impact of the national-level policies on the internationalisation efforts of their HEIs. Given the current anti-immigration legislation in these two countries, this result makes sense. Respondents from Kazakhstan (83%) and Norway (79%) were the most positive about the impact of their national policies, while respondents from HEIs in French Belgium (12%) and the Slovak Republic (11%) were the most likely to indicate that their national-level policy had no impact.

Significant geographic variations concerning the effect of different national policies, regulations and structures also existed. For instance, national agencies were seen by respondents in Austria (89%) and Slovenia (86%) as having a positive impact on their HEIs' internationalisation efforts, but were viewed significantly less positively by respondents at Flemish Belgian (40%) and Italian HEIs (42%). Respondents from Norway (82%) and Lithuania (79%) in particular favourably viewed the effect of national financial support for internationalisation activities, whereas respondents from Swiss HEIs (74%) were most positive about the effect of their research infrastructure.

Immigration and admissions regulations received the most mixed reviews. The former varied from being very negatively viewed by respondents in the UK (81%) and Denmark (77%), to being negatively viewed by only a few of the Croatian (8%) and Ukrainian (10%) respondents. Respondents from HEIs in the Czech Republic (50%) and Denmark (49%) were the most negative about their national admissions regulations. No respondents from Estonia perceived these regulations negatively.

Interestingly, some of the countries that could be classed as 'emerging' in the field of internationalisation of higher education, appeared to be more satisfied with the support of their national policies and programmes than some of the more established ones in the field. Yet the picture is not clear-cut. It would be interesting to follow up these research outcomes with studies that examine the reasons behind the

notable differences between countries. However, time will tell if national support for internationalisation fluctuates with political cycles, or if countries at different stages of internationalisation require different types of governmental support to fulfil their internationalisation goals and priorities.

SECTION 3: KEY FINDINGS

- The EU policy level was viewed as having a positive impact on internationalisation at their HEIs by almost three-quarters of the respondents. In turn, national-level policies were viewed as having a positive impact by half of the respondents.
- The Erasmus+ programme was perceived as having a positive impact on internationalisation at their HEI by the vast majority of respondents, while many respondents were unaware of the impact of Horizon 2020 on internationalisation at their institution.
- At the national level, national agencies and financial support for internationalisation were the most positively viewed regulations, policies and structures, while immigration and admissions regulations were perceived comparatively negatively.

SECTION 4

Challenges of internationalisation

Higher education staff operate in complex organisational environments when developing and implementing internationalisation strategies, activities and processes. Different stakeholders often pursue competing academic, economic and social agendas that affect internationalisation. At the same time, HEIs face an increasingly competitive and commercialised external environment. To investigate these issues further, the survey asked respondents to reflect on the internal and external challenges their HEIs experience when undertaking internationalisation.

INTERNAL CHALLENGES

Those surveyed reported a wide range of internal challenges in their HEIs' pursuit of internationalisation. The most commonly noted challenges related to insufficient internal budget for internationalisation (39%), followed by a lack of commitment to internationalisation by some faculty/staff (38%). Insufficient recognition for involvement in internationalisation activities (27%) and lack of scholarship opportunities for international students (27%) arose as the third most common challenges. In contrast, lack of diversity of the international student body (6%) and (perceived) high tuition fees (6%) were seen as the least pressing internal challenges of those surveyed (Figure 17).

These findings are perhaps a worrying indication of the reality of internationalisation policy development and implementation in European HEIs. Despite the fact that internationalisation is well-supported through EU (and in many cases national-level) policies as well as institutional strategies and structures, these results suggest that unfortunately

internationalisation is neither properly funded, nor supported by all internal stakeholders, nor recognised as an important feature of the work of faculty and staff in a number of HEIs.

Figure 17

Top 10 internal challenges* (n=2099)



* Respondents were able to select up to three answers

When comparing different institutional types in the sample, the largest variations in internal challenges were discernible when comparing HEIs of different sizes. For example, staff at large HEIs (with more than 20,000 FTE students) more often reported a lack of commitment to internationalisation (45%) and insufficient recognition for involvement in internationalisation (33%) as being important internal challenges. A lack of commitment to internationalisation was also more often noted by respondents from universities of applied sciences (45%) as a common challenge, than from staff at other institutional types. Analysis of the data shows that privately-funded HEIs were more likely than other types of institutions to struggle with the challenge of (perceived) high tuition fees (private non-profit, 12%, and private for-profit, 14%).

Perhaps unsurprisingly, inadequate institutional structure or leadership for internationalisation was a much more common struggle for staff at respondents' HEIs where internationalisation is the uncoordinated initiative of individual staff (40%), and at respondents' HEIs with multiple offices working independently on internationalisation (35%).

The challenges in different roles

Respondents holding different roles within their HEIs perceived somewhat different internal challenges, which is perhaps a reflection of their varying responsibilities in relation to the delivery of internationalisation. For example, staff members working in an international office were the most likely to indicate lack of commitment by some staff (45%) as being an important challenge. Heads of institutions (28%) and heads of academic departments (21%) were less likely to perceive this as a challenge. Heads of institutions were the least likely to view insufficient recognition for involvement in internationalisation activities as a challenge (16%). For other administrative staff, lack of integration of international students (25%) featured as a more prominent challenge.

Regional results

The internal challenges experienced by staff varied greatly between different geographic regions. Respondents working at HEIs in Eastern Europe (46%) were more likely to note that they struggle with insufficient budgets for internationalisation than their peers in other regions (Figure 18). However, respondents from HEIs in Northern and Western Europe (43% in both cases) were more likely to note challenges with regards to lack of commitment to internationalisation by some of their colleagues. This was particularly the case in Norway (63%) and Denmark (55%).

Lack of scholarship opportunities surfaced more often as challenges in Latvia (57%) and Poland (48%) than for respondents from other countries. The lack of foreign language proficiency was more commonly reported as a challenge by staff in Western Asia (45%) and Eastern Europe (35%), particularly among respondents from Ukraine (58%) and Turkey (51%). Insufficient recognition for involvement in internationalisation activities was seen as an especially problematic challenge for respondents from Flemish Belgium (44%) and Austria (42%).

Figure 18**Top 10 internal challenges by region* (n=2099)**

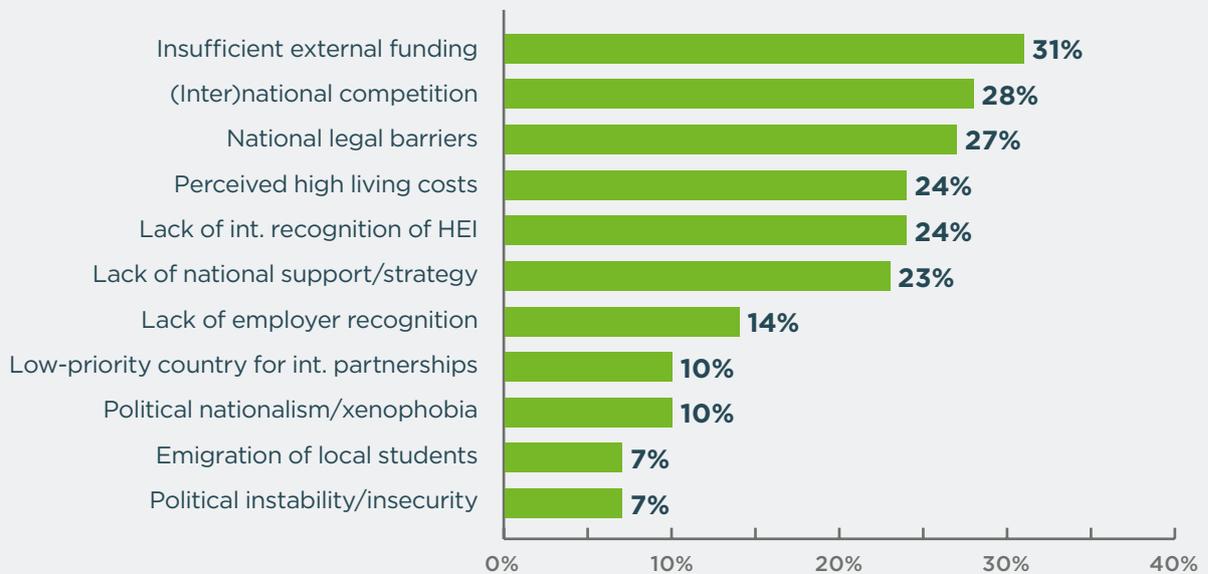
	EHEA	Northern Europe	Eastern Europe	Southern Europe	Western Europe	Western Asia
Insufficient internal budget	39%	38%	46%	44%	34%	41%
Lack of commitment by some staff	38%	43%	33%	37%	43%	19%
Lack of internal recognition	27%	27%	22%	33%	31%	14%
Lack of int. scholarships	27%	28%	27%	26%	27%	26%
Lack of student/staff foreign language skills	24%	11%	35%	28%	20%	45%
Lack of inst. structure/leadership	21%	27%	11%	19%	24%	16%
Lack of staff expertise	16%	14%	18%	17%	15%	18%
Students not pursuing int. education	16%	24%	12%	17%	12%	10%
Lack of integration of int. students	15%	21%	11%	9%	16%	16%
Lack of int. student/staff local language skills	10%	5%	12%	11%	12%	11%

● 1st ● 2nd ● 3rd

* Respondents were able to select up to three answers

EXTERNAL CHALLENGES

Those surveyed were also asked to reflect upon the external challenges that their HEIs face in their pursuit of internationalisation. The data shows that the respondents indicated insufficient external funding for internationalisation (31%), competition amongst institutions nationally and internationally (28%) and restrictive national legal barriers (27%) as the most pressing external challenges (Figure 19). Political and societal developments such as nationalism, brain drain or safety concerns appeared to be less common challenges for respondents' HEIs in the EHEA.

Figure 19**Top 10 external challenges* (n=2082)**

* Respondents were able to select up to three answers

Taken in conjunction with other findings of this study, these results underline some important realities in HEIs' pursuit of internationalisation. For example, it is evident that internationalisation and its related activities are held back by being insufficiently funded, both internally and externally, more than by any other challenge. At the same time, respondents' HEIs struggle with the pressures of competition with other HEIs. This is particularly a concern, especially when considering that, in many instances, internationalisation activities are delivered in partnership with other HEIs.

It is clear too that different types of HEIs faced different external challenges. Legal barriers (32%) and national support infrastructure (27%) were comparatively more commonly cited challenges among respondents at research universities. Respondents at universities of applied sciences (31%) and those working at smaller HEIs (29%) struggled more with institutional recognition, whereas respondents working at specialised higher education institutions were more likely to experience funding as a challenge (36%).

Regional results

External funding for internationalisation surfacing as the main external challenge might seem contradictory to the reported positive impact of both the national financial support for internationalisation (56%) and the national higher education funding mechanism (47%; Figure 16). A closer analysis reveals that respondents from Southern Europe were the least positive about the national financial support and reported insufficient external funding (44%) as a challenge the most. Respondents from Southern Europe were also more likely to cite inadequate national support infrastructure and strategy for internationalisation (37%) as a key challenge.

Respondents from HEIs in Northern Europe were more likely to highlight perceived high living costs (42%) and restrictive legal barriers (38%) as challenges. Indeed the significance attributed to restrictive legal barriers as a challenge varied greatly across the sample, with more than half the respondents from Denmark (66%), the UK (61%) and Czech Republic (59%) indicating them as a challenge, compared to only a mere 6% in Croatia (for the impact of national policies, see section 3).

Institutional competition was more often cited as a barrier by Western European respondents (34%). Nationalism surfaced as a key challenge in only a few countries, namely the UK (39%), Denmark (39%), Poland (35%) and Hungary (26%). In addition, respondents from Eastern Europe (19%) and Western Asia (18%) were more likely to indicate that their country being perceived as a low priority for international partnerships, was an important challenge that their HEI faces in the pursuit of its internationalisation goals. Brain drain of local students stood out as being a particularly challenging issue for respondents from Eastern Europe (18%).

Figure 20**Top 10 external challenges by region* (n=2082)**

	EHEA	Northern Europe	Eastern Europe	Southern Europe	Western Europe	Western Asia
Insufficient external funding	31%	26%	33%	44%	29%	33%
(Inter)national competition	28%	31%	21%	27%	34%	22%
National legal barriers	27%	38%	27%	23%	22%	19%
Perceived high living costs	24%	42%	5%	7%	32%	13%
Lack of int. recognition of HEI	24%	19%	25%	25%	27%	25%
Lack of national support/strategy	23%	23%	24%	37%	14%	22%
Lack of employer recognition	14%	18%	13%	19%	10%	13%
Low-priority country for int. partnerships	10%	7%	19%	10%	6%	18%
Political nationalism/xenophobia	10%	13%	14%	3%	11%	4%
Emigration of local students	7%	7%	18%	10%	2%	2%
Political instability/insecurity	7%	6%	13%	5%	2%	13%

● 1st ● 2nd ● 3rd

* Respondents were able to select up to three answers

SECTION 4: KEY FINDINGS

- The most commonly cited internal challenges that respondents' HEIs face in their pursuit of internationalisation were insufficient internal budget for internationalisation and lack of commitment to internationalisation by some faculty/staff.
- Respondents most commonly noted insufficient external funding for internationalisation, competition amongst institutions nationally and internationally, and restrictive national legal barriers as being the most significant external challenges that their HEIs face.
- Respondents' perception of internal and external challenges varied greatly by region and country.

SECTION 5

Looking back and planning ahead

The *EAIE Barometer* second edition sought to map and better understand internationalisation of higher education in the EHEA, as viewed by faculty and staff working on internationalisation at HEIs in different functions. The goal of this study is to provide a unique collection and analysis of data on internationalisation in the EHEA. This section summarises some of the key findings of this study. It also includes reflections on the future of internationalisation within the EHEA, and raises some questions to the sector that have become apparent in analysing the findings of the study.

Student preparedness and mobility

As detailed in this report, respondents' HEIs in the EHEA are increasingly pursuing internationalisation in order to prepare their students for life and employment in a globalised world. The second most commonly cited goal for internationalisation was improving the quality of their education. These goals appear to be inherently linked, as improving the quality of education should better prepare students for a globalised world, and in turn enhance their employability.

In seeking to achieve these goals, institutions prioritise a wide range of different activities through their institutional internationalisation strategies. International mobility of home students and international student recruitment, followed by international mobility of home faculty and staff, and developing strategic international partnerships stood out as the most commonly noted priority activities.

When comparing the results of this study to the first edition of the *EAIE Barometer*, it is clear that student mobility was and continues to be the most important and commonly pursued internationalisation activity within respondents' HEIs.

It is important to note too that the data shows that the goals for internationalisation do not strongly correlate with the internationalisation activities prioritised in institutional strategies. In most instances, respondents' HEIs appear to prioritise relatively similar internationalisation activities, irrespective of their main goals.

Increased mainstreaming

Internally, respondents' HEIs have further established structures to support the pursuit of internationalisation. The vast majority of respondents reported that their HEI had an institutional internationalisation strategy of some form. Staff were increasingly working in multiple offices with coordination, rather than a traditional single international office, illuminating the trend towards mainstreaming of internationalisation within HEIs. However, only half of the survey's respondents indicated that their HEI formally assessed quality internally, which seems to provide evidence that additional action needs to be taken to further enhance the quality of institutional internationalisation efforts.

Funding as a challenge and an enabler

In pursuing internationalisation, HEI faculty and staff working on internationalisation encountered numerous internal and external challenges. It is clear that the most commonly faced internal and external challenge is a lack of sufficient funding for internationalisation. This appears to indicate that there is often a mismatch between the willingness of faculty and staff at respondents' HEIs to advance internationalisation and the funding that is available to ensure this progress.

Lack of commitment to internationalisation by some faculty and staff and insufficient recognition for involvement in internationalisation activities were the second and third most commonly reported internal challenges. Again, this suggests that some respondents' HEIs have neither done enough to properly explain the importance of internationalisation to all institutional stakeholders, nor taken steps to properly support the internationalisation activities undertaken at the institution. Externally, the

respondents' second and third most commonly noted challenges in their HEIs' pursuit of internationalisation related to competition amongst HEIs and restrictive national legal barriers.

National-level regulations, policies and structures were seen by respondents as both an enabler and an obstacle in their HEIs' pursuit of internationalisation. Analysis of the results of this study show that overall, national agencies and financial support for internationalisation were viewed as having the most positive impact on internationalisation at respondents' HEIs, whereas national immigration and admissions regulations were perceived more negatively. The vast majority of respondents viewed EU-level policies and its flagship programme, Erasmus+, as having a positive impact on internationalisation at their HEIs.

Institutional and professional variations

Across the sample, there were discernible variations in the ways internationalisation is pursued when comparing the different types of institutions represented in the study. This provides further evidence of the importance of context in analysing internationalisation: HEIs with divergent missions, funding approaches and sheer organisational size will have different ways of understanding and acting on internationalisation.

The results also show that, at times, faculty and staff working in different roles across their institution perceived internationalisation differently. Analysis of the findings shows that faculty and administrators outside the international office were, for example, more likely than other respondent groups to work on internationalisation on a project basis or part-time. Probably as a result, these respondents were less aware of some of the aspects of internationalisation undertaken at their institution.

Geographic variations

The biggest differences in the way that respondents and their HEIs understood and acted upon internationalisation could be observed when comparing results by regions and countries. For example, analysis of the results shows that respondents at HEIs in Southern Europe seemed to be more preoccupied with issues related to funding, and that HEIs focus their internationalisation efforts more on student and

staff mobility. Respondents in Northern Europe noted that their institutions focused more on student and faculty recruitment, as well as overcoming (related) national legal barriers. In the Eastern European sample, attention to reputation building as well as student recruitment and programmes in non-local languages were more common features of internationalisation in respondents' HEIs. In Western Europe, on the other hand, respondents cited that their HEIs more frequently focus on student preparedness and internationalisation at home-related activities. In Western Asia, internationalising for quality-enhancing purposes was a more common feature of internationalisation within HEIs, as was developing joint and double-degree programmes and staff mobility opportunities. Data collected from respondents in two countries in particular, the UK and Denmark, stood out in the sample with overall more negative perceptions, perhaps reflecting their anti-international sentiments and political situation.

THE FUTURE

Looking ahead, the vast majority of respondents were confident about the future of internationalisation at their HEI. In total, 81% reported they felt either positive or very positive about the future of internationalisation, while only 4% felt negative. In a time when some have argued that internationalisation is devalued and approaching its end (Brandenburg & De Wit, 2011), these optimistic figures provide evidence that individuals working on internationalisation at HEIs in the EHEA have a more positive outlook and belief in the future of the field.

There were some geographic variations discernible in respondents' confidence in the future. The most optimistic respondents worked at HEIs in Western Asia (89%). The respondents noting the most negative perception of the future of internationalisation at their HEI were from the UK (13%) and Italy (11%).

When questioned as to the aspects of internationalisation they believe will become a more significant feature in the next three years at their HEI, respondents cited international student recruitment (35%) and international strategic partnership building (32%). This should be understood in conjunction with the fact that many

respondents' HEIs in the EHEA already gave high priority to these two activities in their strategies (see Figure 7). However, some of the other activities predicted to become a more central feature of internationalisation at their HEIs in the future are not as often prioritised today, such as distance, online or blended international learning and internationalisation of the home curriculum.

The next edition of the *EAIE Barometer* will provide illuminating insights into whether the optimism for and perceptions of the future of internationalisation in the EHEA as indicated in this study have been fulfilled.

QUESTIONS TO THE SECTOR

As is detailed within this report, analysis of the data collected in the second edition of the *EAIE Barometer* provides unique information about the form, function and understanding of internationalisation of higher education in the EHEA. At the same time, a comparison of different sections of the results of the study also raises some important questions for the diverse international higher education sector in the EHEA. It is our aim that internationalisation stakeholders reflect on these questions, analyse how they apply to their institutional, national and professional realities, and where appropriate, develop policies, actions and further studies in order to properly respond to them.

- Most respondents reported that their HEIs prioritise relatively similar internationalisation activities, despite differences in their stated institutional goals for the process. This raises the question whether the reported main goals for internationalisation reflect ‘socially desirable’ responses. Alternatively, does it perhaps mean that HEIs and their stakeholders are not taking a goal-orientated approach to their internationalisation efforts? For example, preparing students for a globalised world was noted as the most important goal of internationalisation at respondents’ HEIs, yet internationalising the home curriculum, and courses and activities developing students’ international awareness, were only the eighth and eleventh most frequently prioritised internationalisation activities within internationalisation strategies. Furthermore, financial benefits was rarely noted as a key goal of internationalisation, even though the second most prioritised internationalisation activity – international student recruitment – has the potential for significant revenue generation in many countries.
- It is clear that in a number of countries in Europe, the rise of nationalism and anti-international governments will have an impact on higher education policy and delivery. In light of the current political climate, it seems surprising that respondents neither noted political nationalism as an important external challenge, nor did the vast majority of respondents prioritise engagement with local societies on internationally relevant issues within their strategy. Bearing in mind that the

majority of respondents were optimistic about the future, does this mean that faculty and staff feel that these changes are transient in nature? Or does it signify that the potential socio-political changes that the rise of nationalism may bring are either not taken seriously or not properly understood?

- Analysis of the data shows that the main internal and external challenges faced by respondents' HEIs in their pursuit of their internationalisation goals relate to lack of budget and/or funding for internationalisation. This suggests that in the future, institutions may have to further diversify their revenue streams, in order to more fully advance internationalisation. How should HEIs then develop new approaches to funding internationalisation, while at the same time remaining accessible to all student groups and independent in their choice of approaches to internationalisation?
- Whilst not universal, it is clear that a number of HEIs are facing national policies and regulations that are hindering their internationalisation efforts. This might entail that HEIs will be forced to develop new internationalisation activities and models to succeed. Especially in light of the predicted growth of international student recruitment, which is heavily dependent on favourable immigration and admissions regulations. How will the sector tackle these obstacles? In such circumstances, the predicted future growth of activities, such as online and blended learning, as well as internationalisation of the home curriculum, could potentially flourish. However, the proliferation of these two activities has been predicted for some time, without widespread adoption or progress.
- As is evidenced in this study, internationalisation is becoming increasingly mainstream within HEIs in the EHEA. As a result, the number of internal stakeholders involved part-time in internationalisation will likely grow, effectively meaning that staff groups at the periphery of internationalisation will become more central to its coordinated implementation. The differences in the perceptions of different staff groups and the often-reported challenge of a lack of commitment to internationalisation by some staff, indicate that more work needs to be done to achieve this synergy. Should HEIs, for instance, take a more strategic approach to staff training on internationalisation in the future than currently appears to be the case?

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ABOUT THE EAIE

Founded in 1989, the European Association for International Education (EAIE) is the European centre for knowledge, expertise and networking in the internationalisation of higher education. As a member-led association of more than 3000 members from more than 80 countries, our mission is to help our members succeed professionally and to contribute to developments in international higher education from a European perspective.

We achieve this mission through a combination of training, conferences and knowledge acquisition and sharing. The EAIE Annual Conference and Exhibition is Europe's largest international higher education event, gathering more than 5500 professionals from nearly 100 countries to network and discuss the latest trends in the field. The EAIE Academy, the core of our top-class training programme, is a bi-annual training event offering a wide range of in-depth courses delivered by expert trainers. Our expansive knowledge base of publications and resources, covering all the major topics in the internationalisation of higher education, equips professionals with best practices and workable solutions to internationalisation challenges, and provides a platform for strategic exchange.

We partner with key stakeholder organisations and institutions to promote our membership's interests and advance international higher education in Europe and the rest of the world.

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ABOUT IFF RESEARCH

With over 50 years' experience, IFF Research is one of the leading research agencies in the United Kingdom. IFF provides high-quality strategic research for a wide range of organisations across the public and private sectors. IFF's home is central London, but their client base spans throughout the UK and internationally. IFF is uniquely positioned in their industry as the largest, longest-standing independently-owned agency. IFF's vision is to illuminate the world characterised by information overload. IFF's purpose is to help organisations, businesses and individuals make better-informed decisions, for the good of us all.

IFF has delivered insights supporting the development of the higher education sector for the last three decades, working with national and international sector agencies as well as individual providers. In the UK, IFF is integrally involved in the Higher Education Statistics Agency (HESA) Destinations of Leavers from Higher Education (DLHE) series, the UK's largest social survey (after the census), which tracks the career paths of graduates after leaving higher education. IFF has delivered the longitudinal element of the survey since 2004, and currently conducts the 'early' survey for around 40 providers. Last year alone IFF spoke to over 160,000 graduates.

Internationalisation is at the heart of the UK's higher education innovation, growth and sustainability, never more so than during the current unprecedented period of regulatory reform, public funding scrutiny and consumer marketisation facing all UK providers. In response to the current dynamic political environment, the IFF Higher Education team has developed innovative research methods designed to examine factors impacting the future of higher education provision. IFF continues to support the sector in the UK and internationally, to fulfil their organisational vision and purpose.

DIVE DEEPER INTO THE DATA

COMING IN 2019

The EAIE Barometer: Factors of success

An analysis of the commonalities among HEIs that are successfully pursuing internationalisation

The EAIE Barometer: The role of funding in internationalisation

A look at the ways in which funding is both an obstacle to and an enabler of internationalisation