Future trends of internationalisation

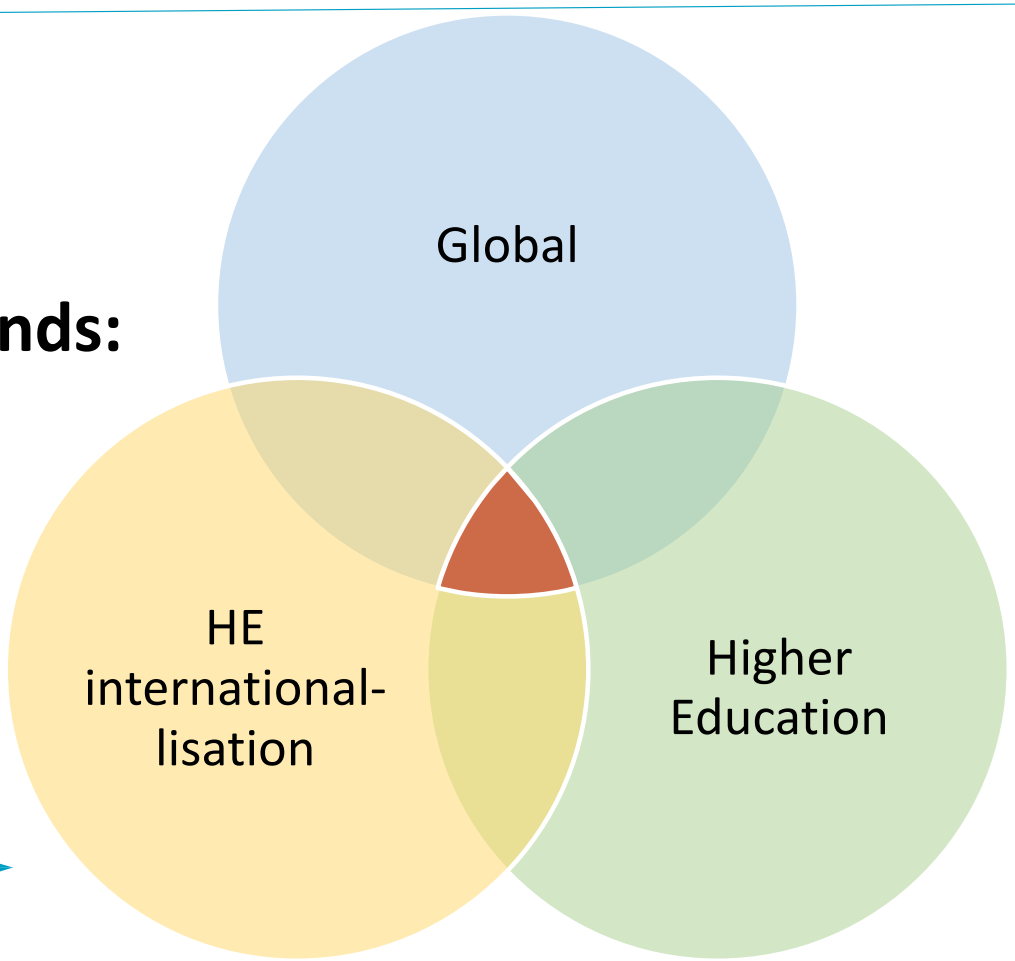
Uwe Brandenburg, PhD
uwe.brandenburg@globalimpactinstitute.eu

Berlin, 5 April 2018

Global Impact Institute

Global Impact Institute

Three levels of future trends:



Global Impact Institute

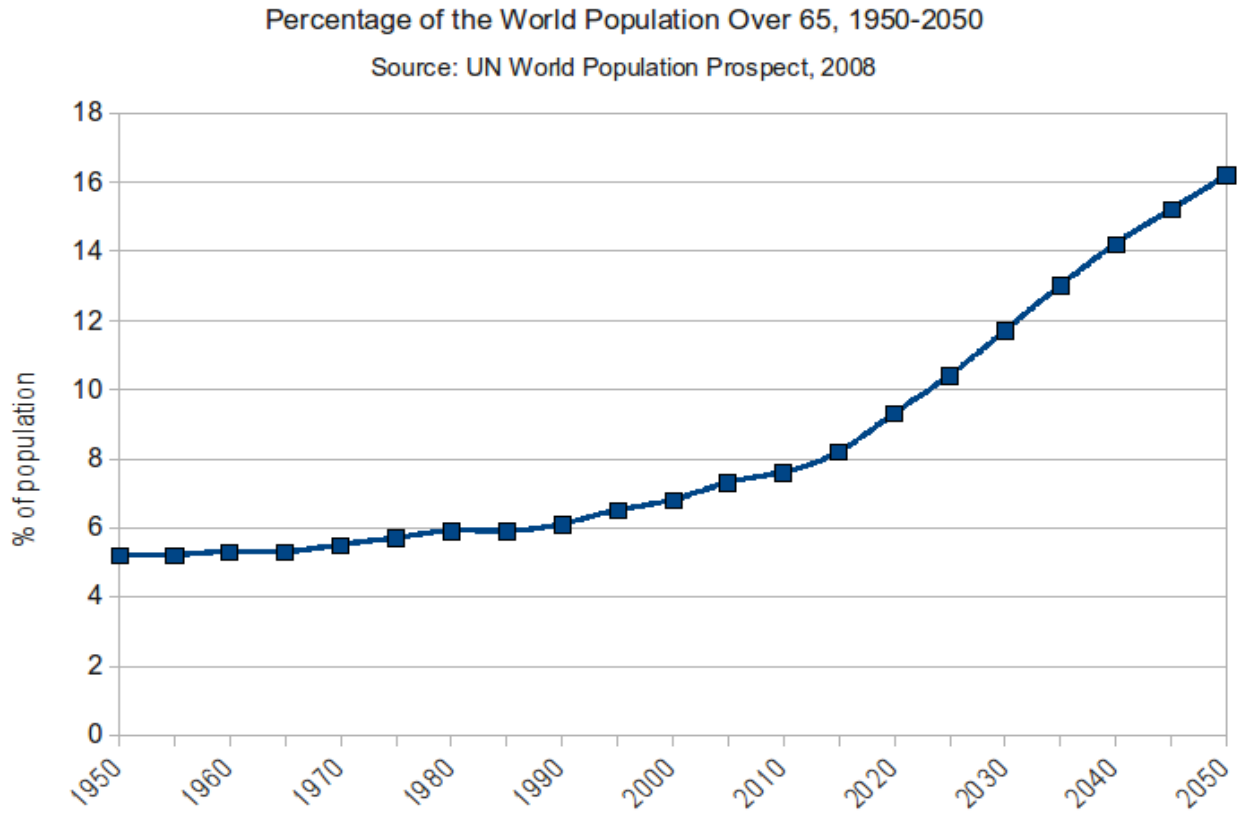
Global future trends

Global future trends

Global Impact Institute

Aging world:

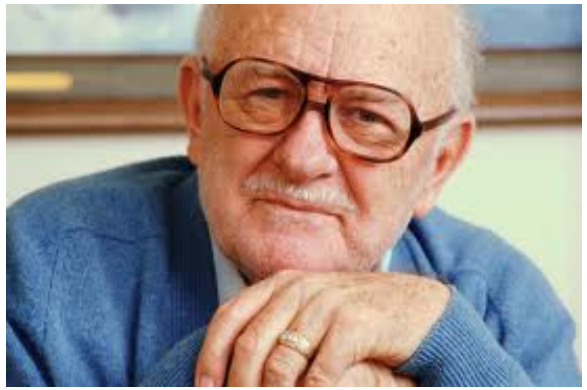
find opportunities of education and employment



Global future trends

Global Impact Institute

Is the population in your country getting younger or older?



- ✓ Declining birth rates in high income countries
- ✓ Population growth is mainly in Africa and Asia
- ✓ Labour shortage in “the West”
- ✓ Global explosion of the middle class

Global future trends

Global Impact Institute

Labour market shifts:

increasing automation to affect global workforce

Global future trends

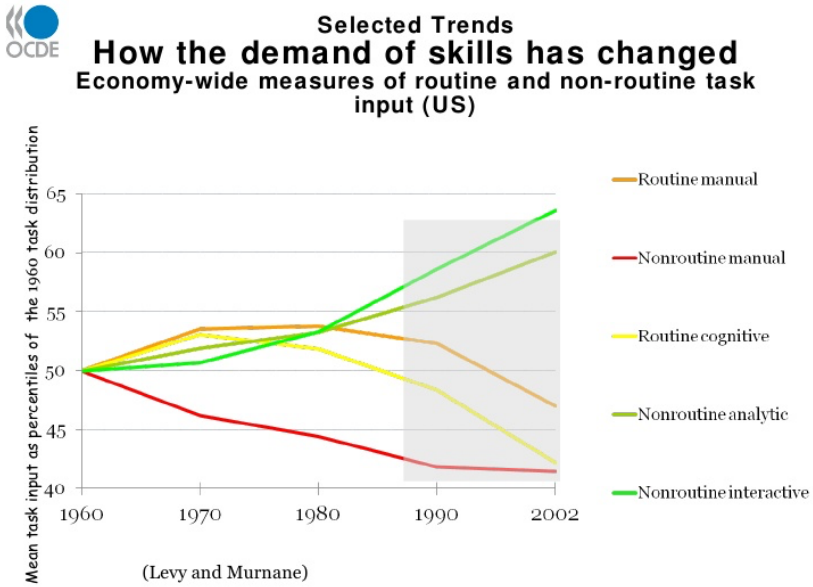
Global Impact Institute

Skills mismatch:

gap between what employers demand vs. what education provides

OCP Dynamics: Anticipatory Thinking Skills (TM)

What's Required? (Compliance)	Why Important? (Sustainability)	*HOW Done? (Usability)*
Know WHO	*Know WHAT*	Know WHEN
Attitude (Capabiltiy)	Aptitude (Consistency)	Abilities (Competency)



Global future trends

Rapid urbanisation:

shift towards cities in search of jobs and career advancement

Dubai 1990-2013

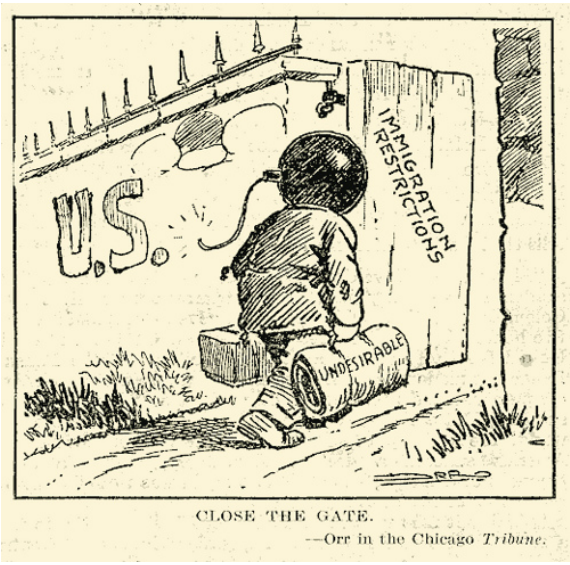
Shenzen 1980-2011

Source of picture: http://justsomething.co/before-and-after-world/

Global future trends

Stricter immigration policies:

more barriers for mobility to high-income destinations



Global future trends

Global Impact Institute

Economic shifts:

dependence on emerging markets for economic growth

Emerging markets will dominate the world's top 10 economies in 2050 (GDP at PPPs)

	2016	2050	
China	1	1	*China*
US	2	2	*India*
India	3	3	*US*
Japan	4	4	*Indonesia*
Germany	5	5	*Brazil*
Russia	6	6	*Russia*
Brazil	7	7	*Mexico*
Indonesia	8	8	*Japan*
UK	9	9	*Germany*
France	10	10	*UK*

E7 economies G7 economies

Sources: IMF for 2016 estimates, PwC analysis for projections to 2050

Global economic power will shift to the E7 economies

In...

1995 E7 *were* ***half*** *the size of* G7

By...

2015 E7 *were around the* ***same*** *size as* G7

And in just 25 years...

2040 E7 *could be* ***double*** *the size of* G7

G7: US, UK, France, Germany, Japan, Canada and Italy
E7: China, India, Indonesia, Brazil, Russia, Mexico and Turkey

Sources: IMF for historical GDP, PwC analysis for projections to 2050

Global future trends

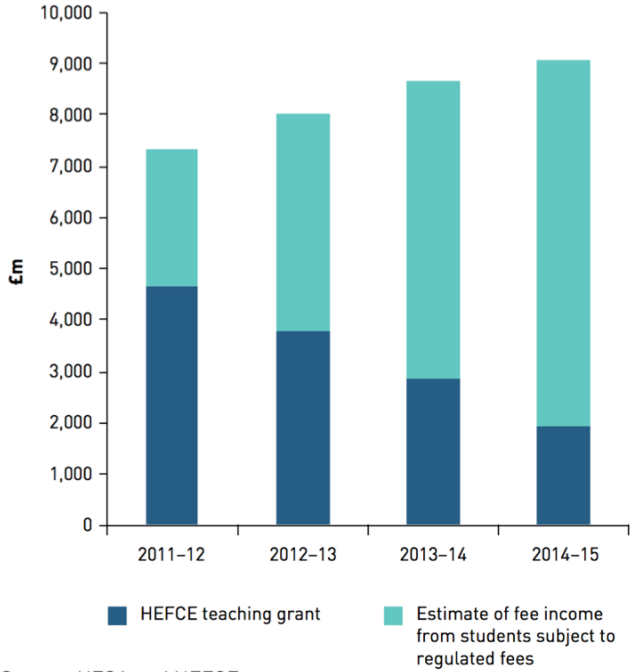
Global Impact Institute

Example England

Budget pressures:

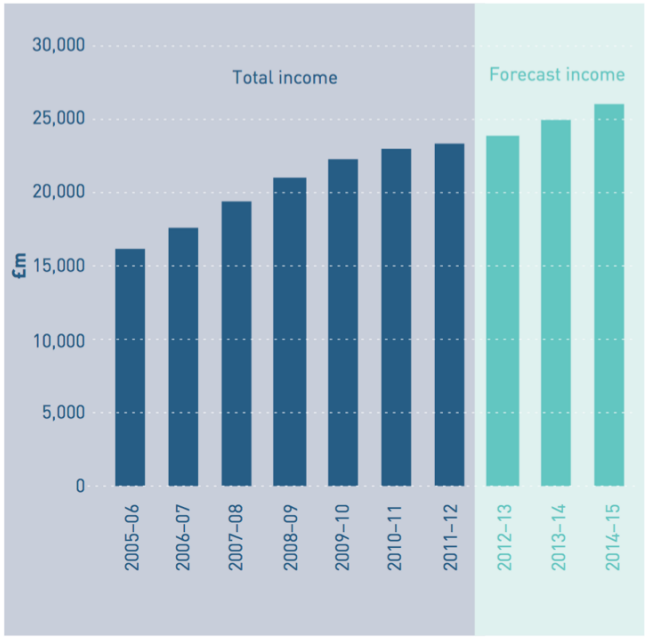
higher education is facing new
facing decline in public funding

Figure 2.3: Change in public funding and fee income, 2011–15



Source: HESA and HEFCE

Figure 2.4: Total income to the higher education sector (England only), including forecast income 2012–13 to 2014–15



Source: HESA and HEFCE

Source of picture: http://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/2013/funding-challenge-for-universities.pdf

Global future trends

Conflict and displacement of people:

refugees and higher education

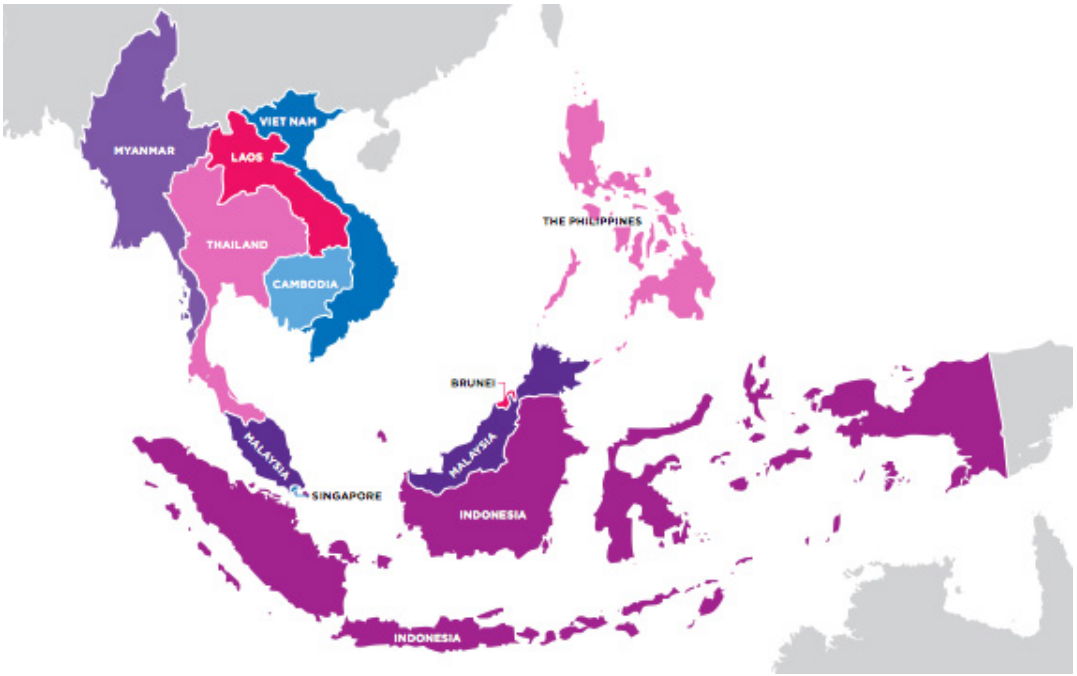
Only 1-5% refugees in the relevant age group found a place in HE (26% in Syria before the war)

Source of picture and data: https://ec.europa.eu/education/events/20170926-conference-higher-education-refugees_en

Global future trends

Intra-regional student mobility:

a growing number of students choosing to study in neighbouring countries vs. studying outside their region



- Now the trend is set in Asia
- ASEAN (600 Mio. Inhabitants) gives it priority

Source of picture and data: http://monitor.icef.com/2014/01/asean-poised-to-usher-in-new-era-of-regional-student-mobility/

Global future trends

Pressure on public finance which is leading to significant reductions in scholarship programmes

Global future trends

Global Impact Institute

Rise in political instability endangering HE environments

CNN Regions | U.S. Politics | Money | Entertainment | Tech | Sport | Travel | Style | Health | Video | VR International Edition +

Report: Political instability on the rise

BUSINESS INSIDER TECH FINANCE POLITICS STRATEGY

Brexit is just one example of the political problems Europe is facing

EDUCATION, POLITICAL INSTABILITY, AND GROWTH

James A. Kahn

Federal Reserve Bank of New York
Research Paper No. 9737

December 1997

Global future trends

Global Impact Institute

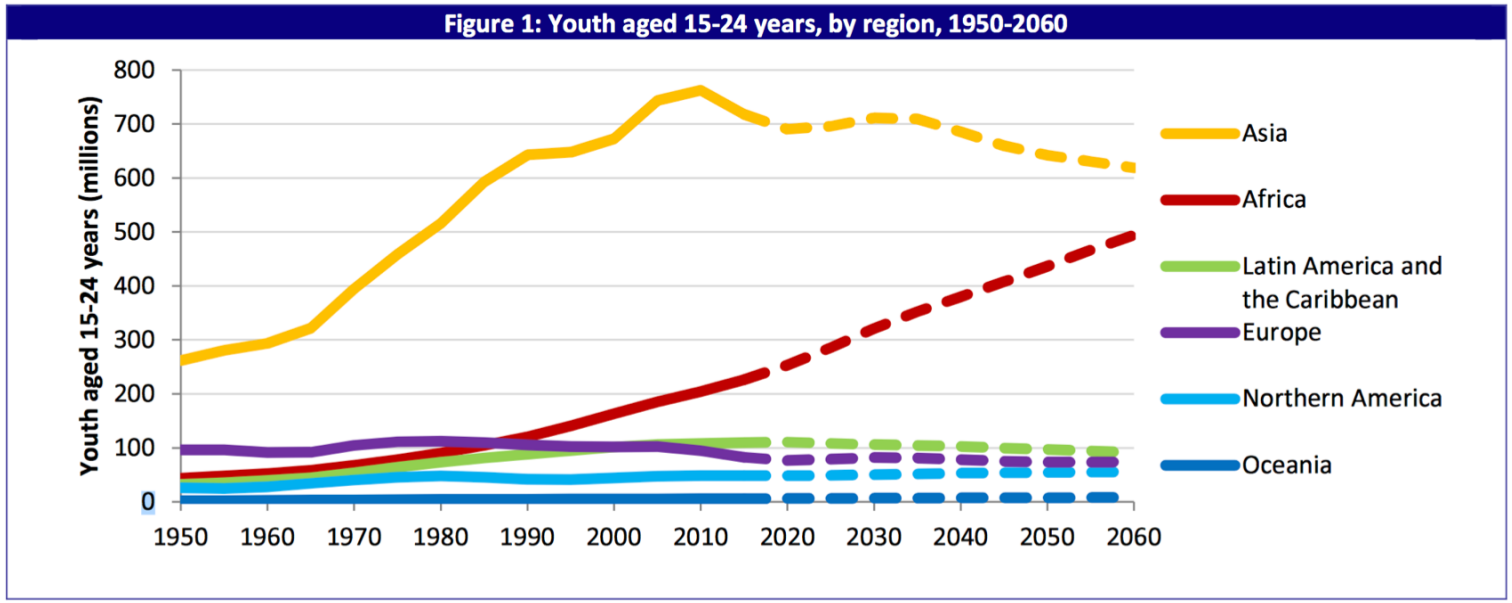
Shift in economic welfare from West to East:

(the largest increases in middle-class population expected to be in East and South-East Asia) affecting HE choices

75% are in Asia!

Global future trends

World demographics: the student age group is a regional challenge!

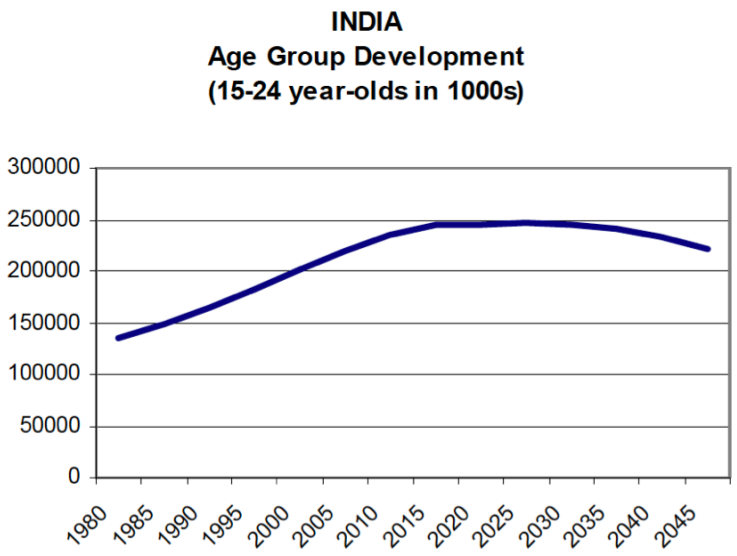


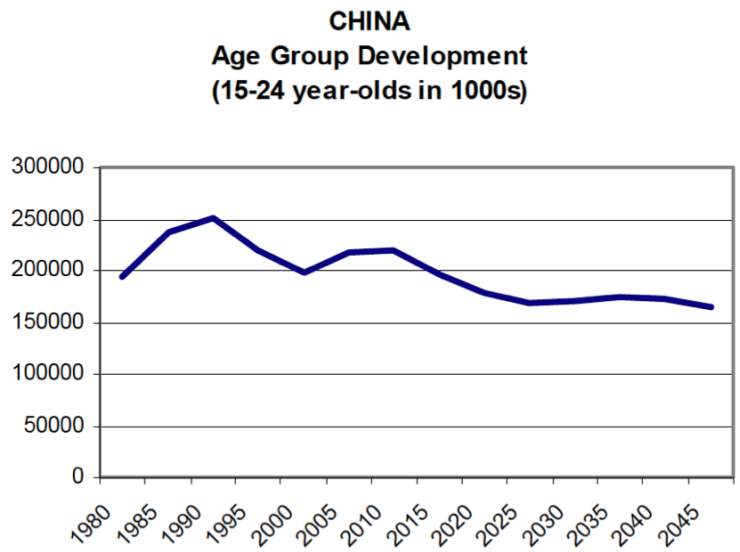
Data source: United Nations (2013) *World Population Prospects: The 2012 Revision.*

Source of picture and data: http://www.un.org/esa/socdev/documents/youth/fact-sheets/YouthPOP.pdf

Global future trends

World demographics: not the same even within Asia!





Source of picture and data: http://www.che.de/downloads/Analysing_the_Future_Market_Target_Countries_for_German_HEIs_AP107.pdf

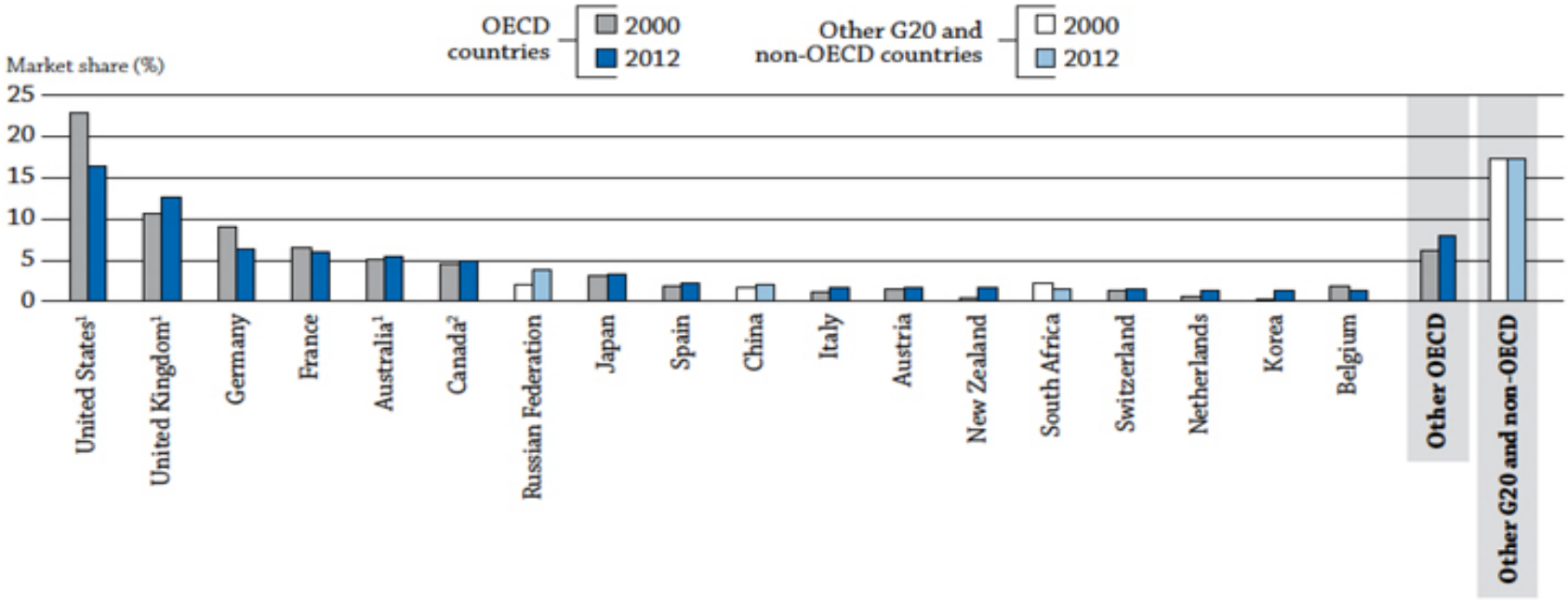
Global Impact Institute

Major future trends **in HE**

Increasing Global Student Mobility

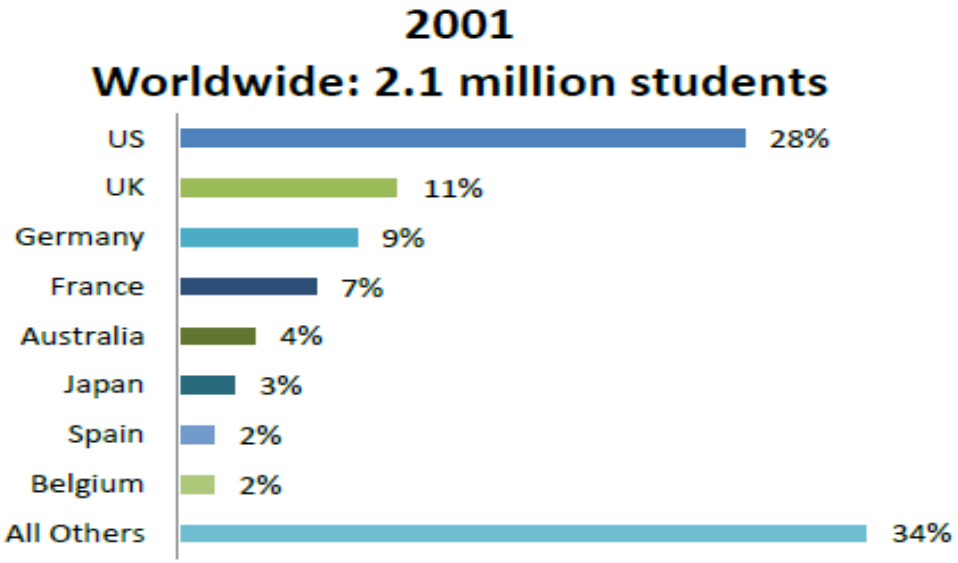
Global Impact Institute

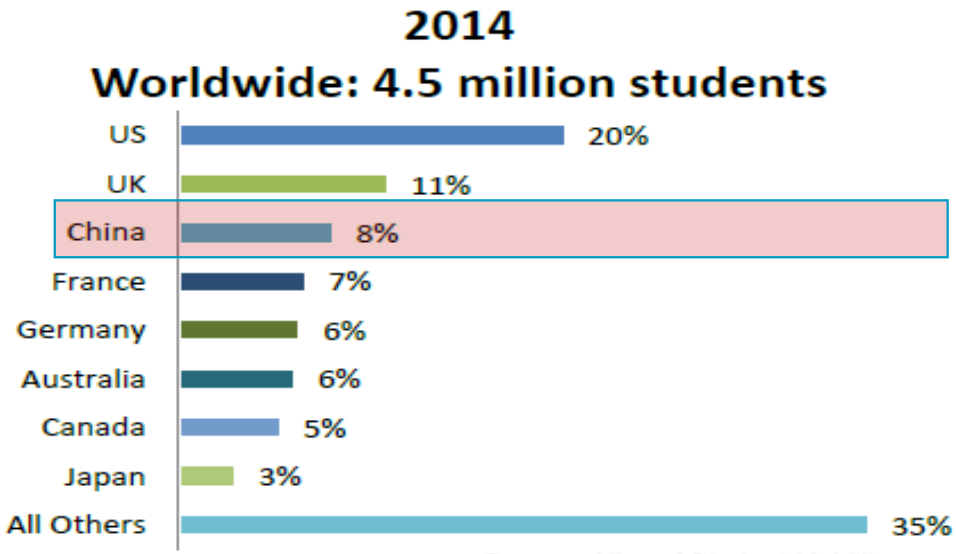
- ✓ Over 5 million students studying abroad in 2014 (OECD 2015 report)
- ✓ If the growth of the 2006-2012 period is extrapolated till 2025 the number would rise above 9 million by 2025 (65% of these students come from Asia)



Changing destinations

Global Impact Institute





Source: *Atlas of Student Mobility*
http://www.iie.org/projectatlas

Global Impact Institute

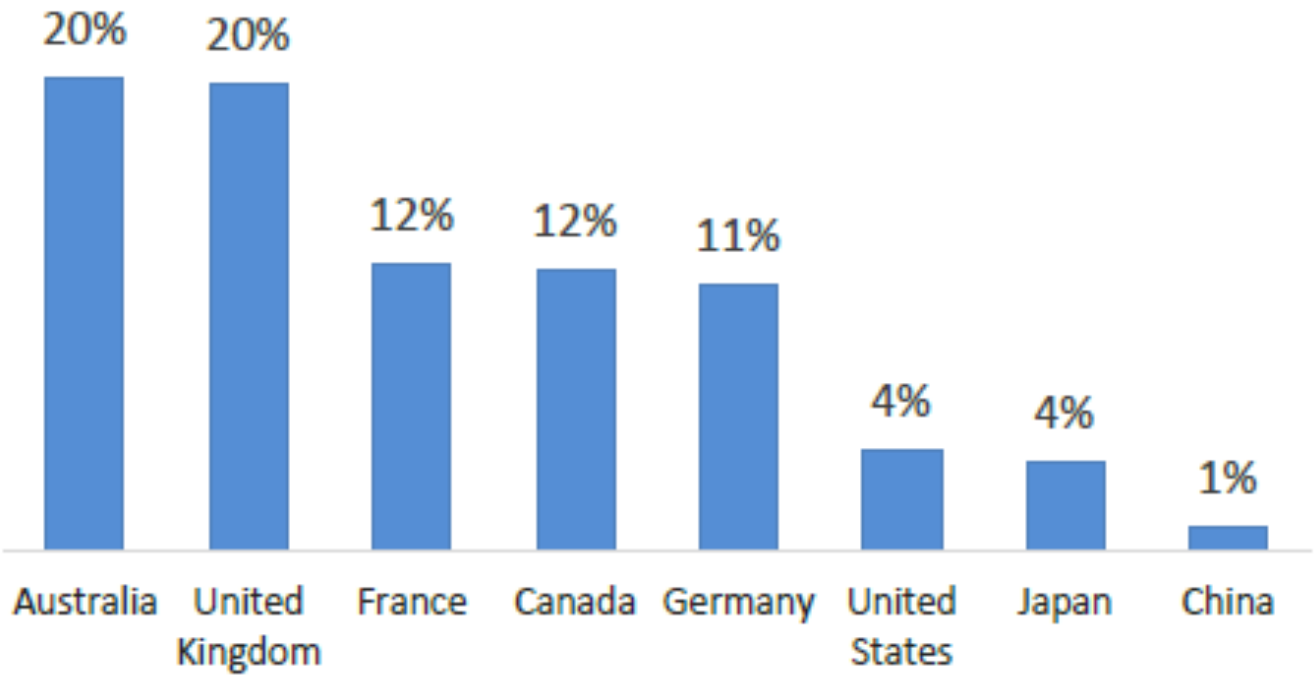
In absolute numbers

Destination	2013 Total Int'l Students
United States	886,052
United Kingdom	481,050
China	356,499
France	295,092
Germany	282,201
Australia	247,093
Canada	237,635
Japan	135,519

Source: *Atlas of Student Mobility*

Percentage of international students of the total enrolment for top countries

Global Impact Institute



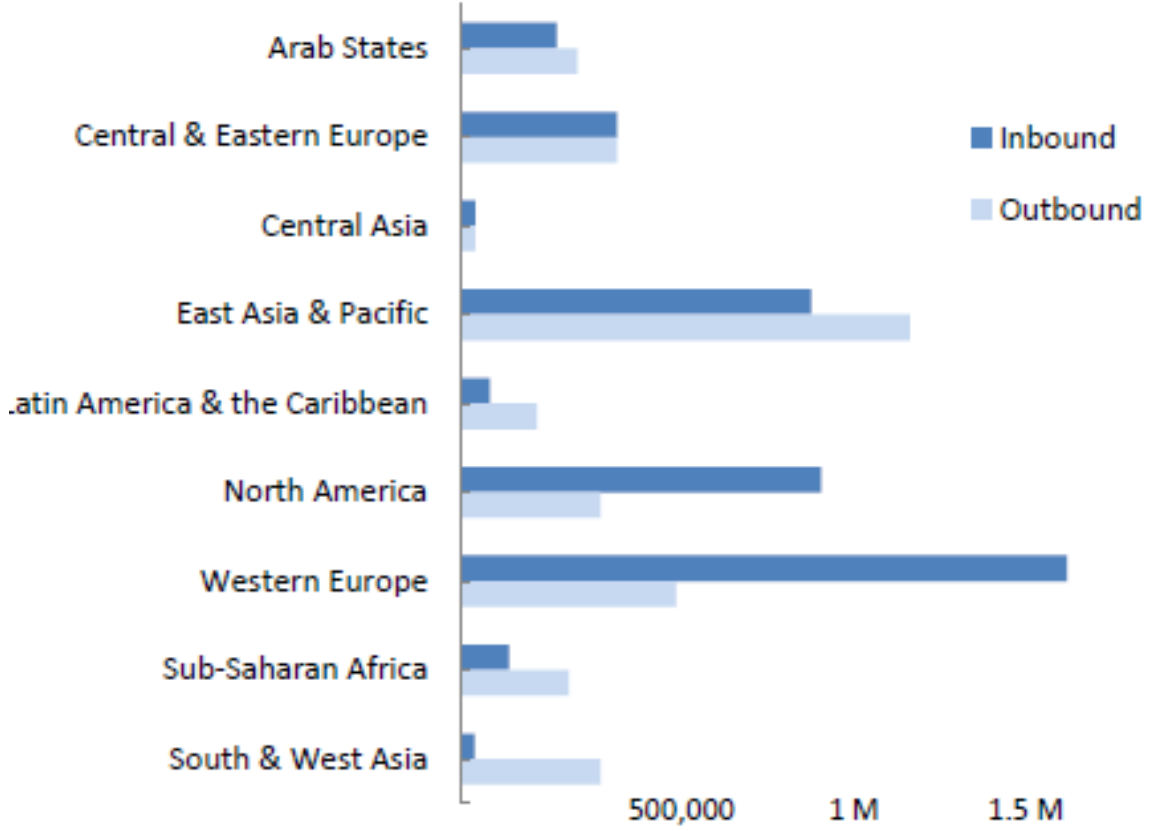
Source: *Atlas of Student Mobility*

Do you think there is balance in outbound and inbound exchange?

Global Impact Institute

- For your country?
- For North America?
- For Latin America?
- For Asia?

Exchange balance



Source: *Atlas of Student Mobility* and UNESCO, 2014

Fastest growth of international students

Global Impact Institute

- By 2020: China, India, US and Brazil (replacing Russia) – are forecast to account for more than 50%!

- Indonesia, Turkey and Nigeria will become increasingly important players

- Russia, Iran and South Korea's global market shares are forecast to fall.

- An increasing number are fee-paying

Higher Education as a global market

Global Impact Institute

- ✓ Global demand for higher education exceeds availability
- ✓ Implementation of tuition fees
- ✓ Student as customer
- ✓ HE as an industry - service oriented
- ✓ Increasing importance of rankings and branding
- ✓ English as the international HE language

Changing role of governments

Global Impact Institute

- ✓ Declining funding - the user pays
- ✓ Privatisation and private equity growth in higher education
- ✓ The benefits of internationalisation are increasingly clear to governments (and employers) - HEIs are pushed

Non-traditional modes in IHE

Global Impact Institute

- ✓ Offshore teaching, in non traditional countries
- ✓ Introduction of online delivery, online teaching, MOOCs – blended learning
- ✓ Twinning programs, joint degrees, franchises
- ✓ Different models of mobility

Strategic alliances, partnerships and networks

Global Impact Institute

- ✓Research within institutions requires to work jointly with partners on a topic
- ✓International partnerships are ‘beyond student mobility.’
- ✓You are as strong as your partners

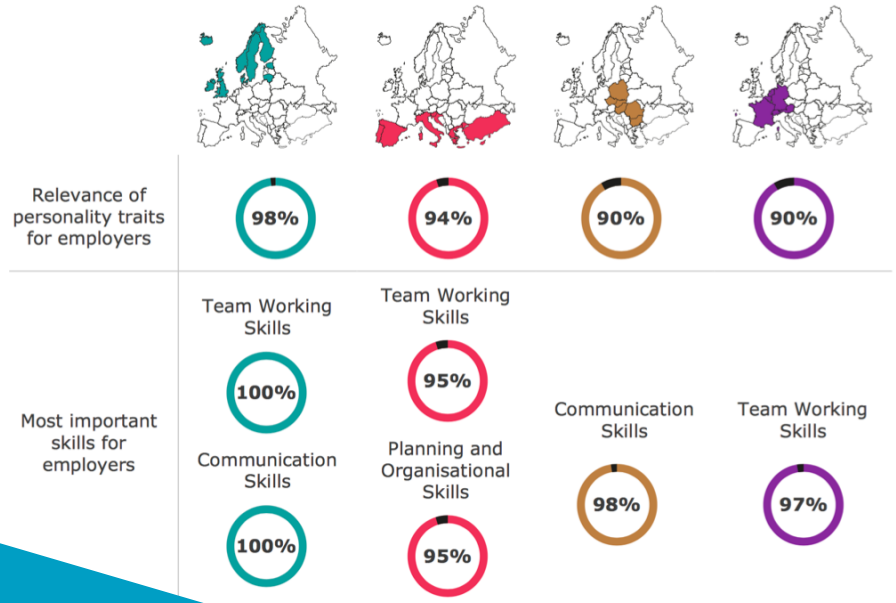
Demand from employers

Global Impact Institute

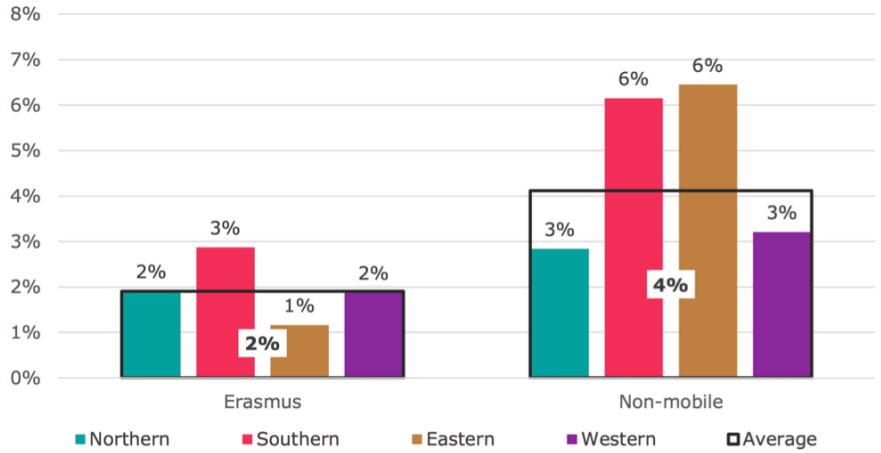
- ✓ Graduates with mobility experience are more valued by employers
- ✓ Benefits of a study-abroad experience have been proven.
- ✓ Erasmus Impact Study
- ✓ Increasing global job-market

Global Impact Institute

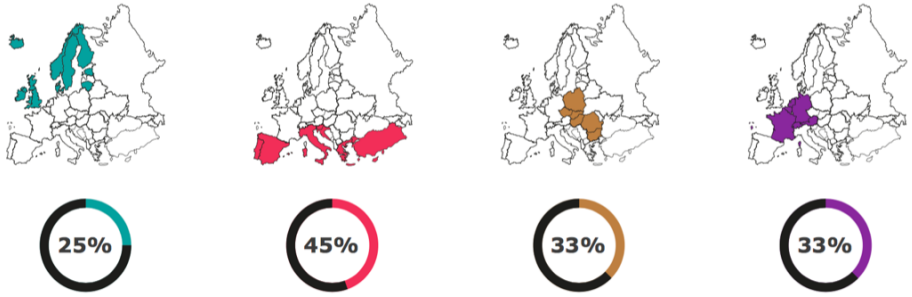
Relevance of personality traits and skills for recruitment



Long-term unemployment of Erasmus and non-mobile alumni (more than 12 months after graduation)



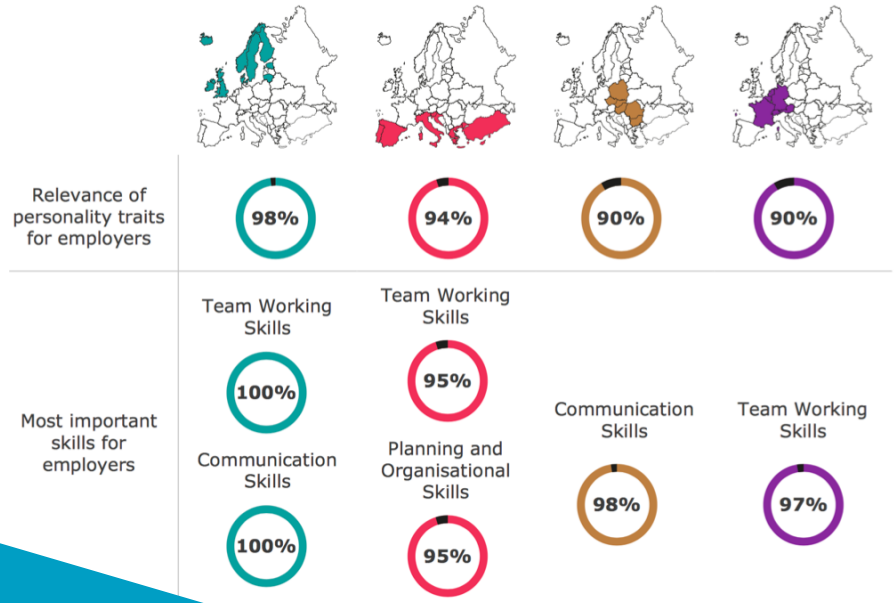
Job offer through a work placement abroad, Erasmus alumni



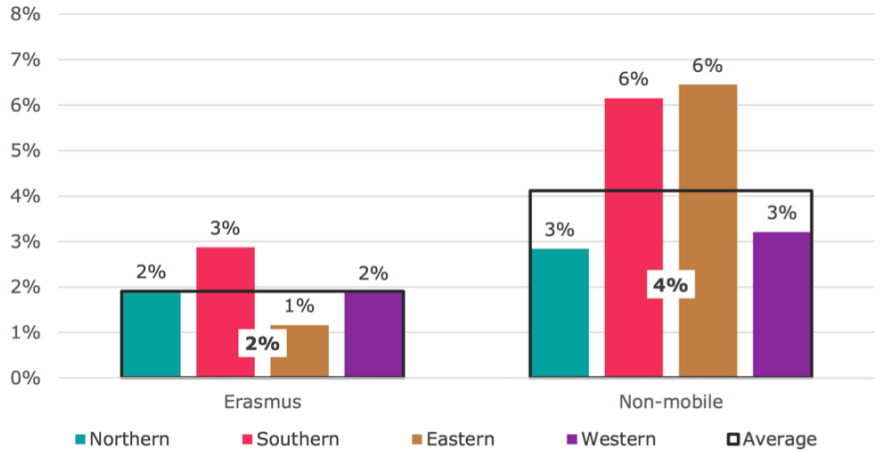
All graphs taken from: http://ec.europa.eu/dgs/education_culture/repository/education/library/study/2016/erasmus-impact_en.pdf?pk_campaign=Email-Feb2016&pk_kwd=Studies3

Global Impact Institute

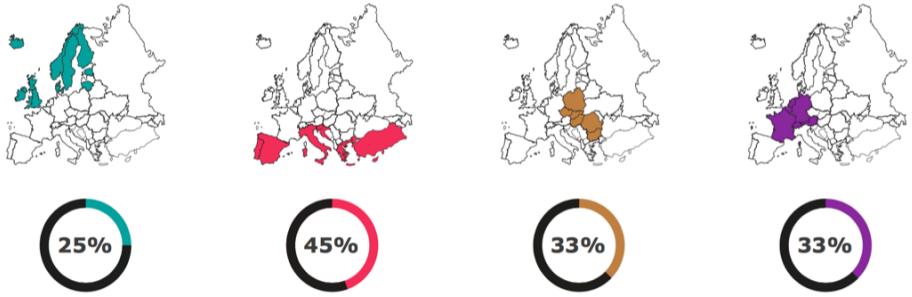
Relevance of personality traits and skills for recruitment



Long-term unemployment of Erasmus and non-mobile alumni (more than 12 months after graduation)



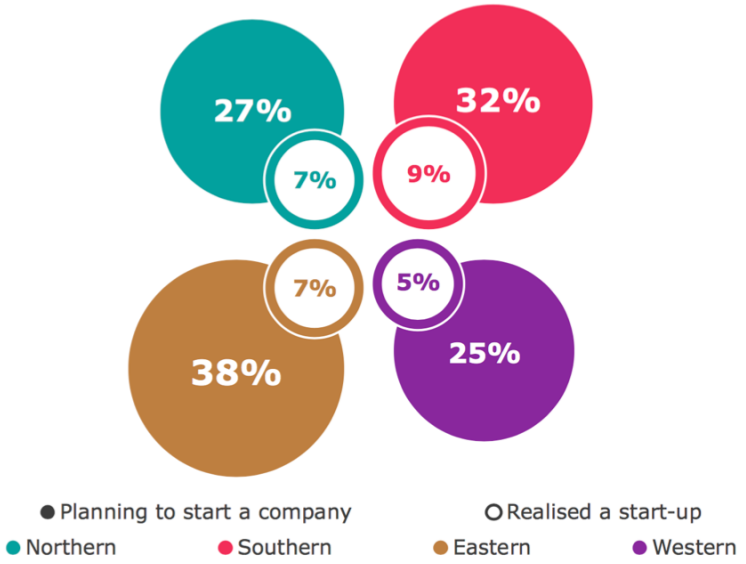
Job offer through a work placement abroad, Erasmus alumni



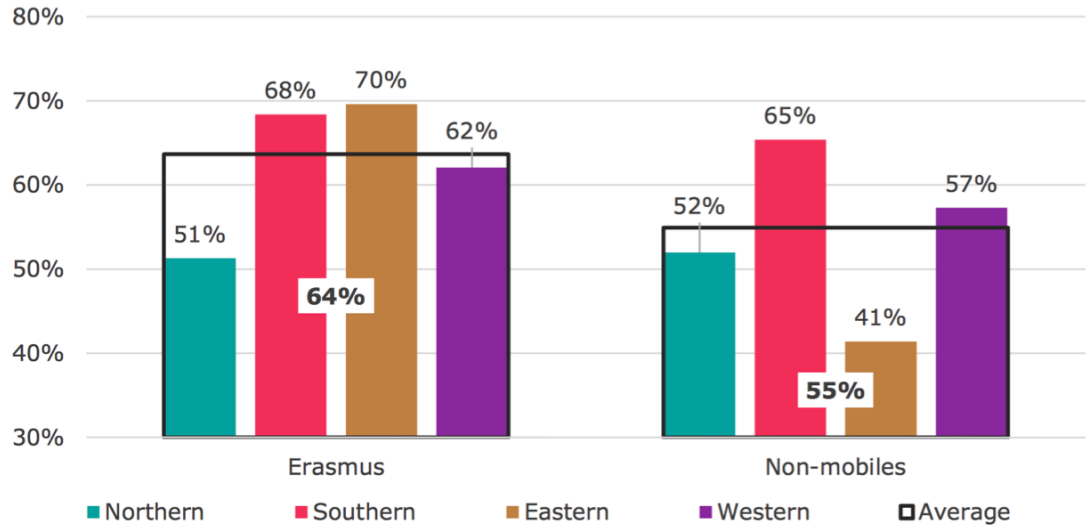
All graphs taken from: http://ec.europa.eu/dgs/education_culture/repository/education/library/study/2016/erasmus-impact_en.pdf?pk_campaign=Email-Feb2016&pk_kwd=Studies3

Global Impact Institute

Start-ups realised or planned by Erasmus alumni



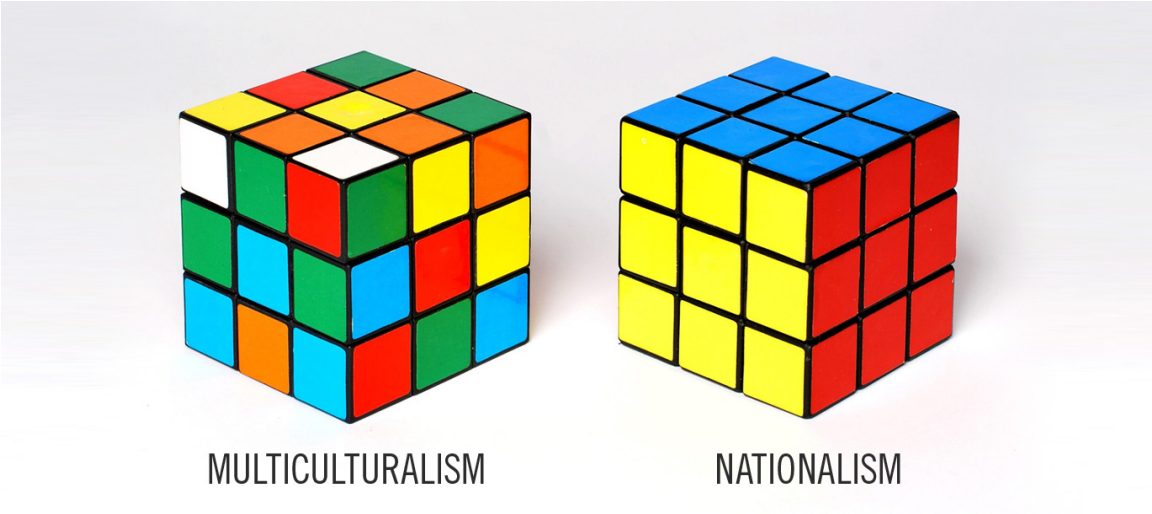
Alumni in management positions five to ten years after graduation



Politics - Populism

Global Impact Institute

- ✓Brexit
- ✓Questions about the use of English as lingua franca
- ✓Trumpism
- ✓Refugees
- ✓etc



Are these trends truly “Global” Trends?

Global Impact Institute

Europe

- ✓ Less public funding – introduction of tuition fees
- ✓ HE is a global market (source of income) and institutions try to attract students
- ✓ Receiving and sending countries
- ✓ Inter-EU mobility main focus South to North & East to West
- ✓ English is becoming the dominant language

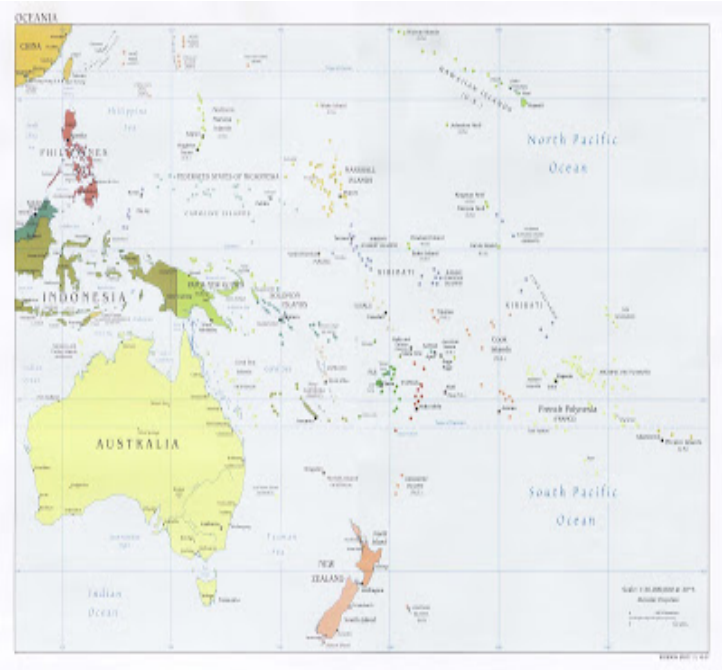
Global Impact Institute

North America

- ✓ Decline of the dominant position of the USA as destination for students, losing students to (mainly) Europe
- ✓ Relatively few outgoing students, students that do go about half go on short programs (week/month long excursions) or summer schools
- ✓ Strong research orientation
- ✓ Huge difference between institutions

Oceania

- ✓ Australia vs. the rest of the region
- ✓ From competition to cooperation
- ✓ Some movement away from the commercial model and more interest in the concept of 'comprehensive internationalisation'
- ✓ Growing focus on the Pacific Rim and Asia and away from Europe.



Global Impact Institute

South America

- ✓ Huge investments in scholarship programs (Chile, Colombia, Ecuador)
- ✓ Focus on training of staff/students through Study Abroad.
- ✓ More private investment in Higher Education
- ✓ Main focus of student mobility is to North America, but the EU is growing

Asia

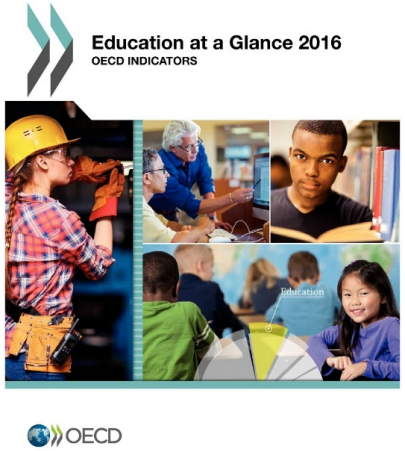
- ✓ Governments are spending more on Higher Education, still capacity shortage
- ✓ Japan, South Korea and Malaysia have an aging population and they are trying to attract students and send their students out on exchange
- ✓ China aims to get cooperation based on equality and not brain drain
- ✓ Main focus of student mobility is to North America, UK and Australia, but the EU is growing.

Africa

- ✓ The 17.5% of the total government expenditure spend on Education is highest of the world (12,2% in North America and Western Europe).
- ✓ Ongoing Brain drain, not only to Europe, also a brain drain in Africa
- ✓ Increasing number of people going to Gulf countries

Follow the trends

Global Impact Institute



Global Impact Institute

Special future trends **in HE internationalisation**

Global Impact Institute

Can you give one word that best describes the future trends in society and internationalisation in your opinion?

21st accessibility adaptability approaches asia attention balancing challenge
contentious development dialogue **diversity** dynamic empathy flexibility
inclusion **inclusiveness** inclusivity inspiring
integration intercultural knowledge more multicultural necessity networking
openness **opportunities** **political** re-evaluate realism
regional reputation **responsability** self-interest skills spreading
sustainability together uncertainty

Data compiled during with polling software during a session on the EAIE 2017 with 139 participants

Global Impact Institute

Current trends

from

Participation

to

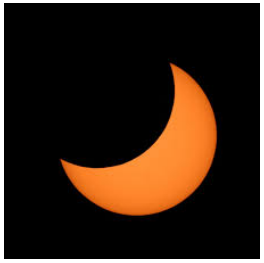
Result

Global Impact Institute

Current trends

from

partial



to

comprehensive

Hudzik, J. (2011). Comprehensive internationalization: From concept to action. Retrieved from http://www.nafsa.org/resourcelibrary/Default.aspx?id=24045 Google Scholar

Global Impact Institute

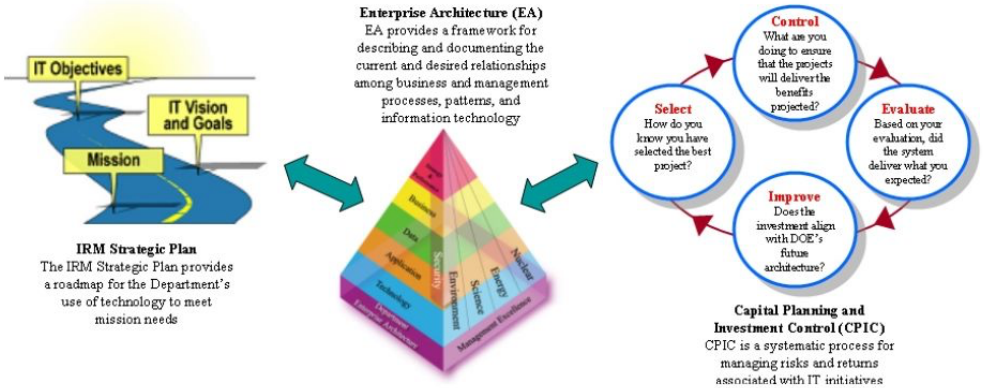
Current trends

from

single activity

to

systematic process



de Wit, H. et al. (2015) Internationalisation of Higher Education. Study requested by the European Parliament. http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf

Global Impact Institute

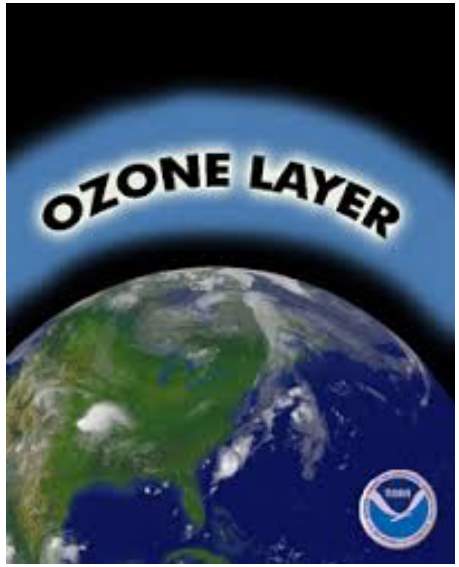
Current trends

from

nice to have

to

Conditio sine qua non

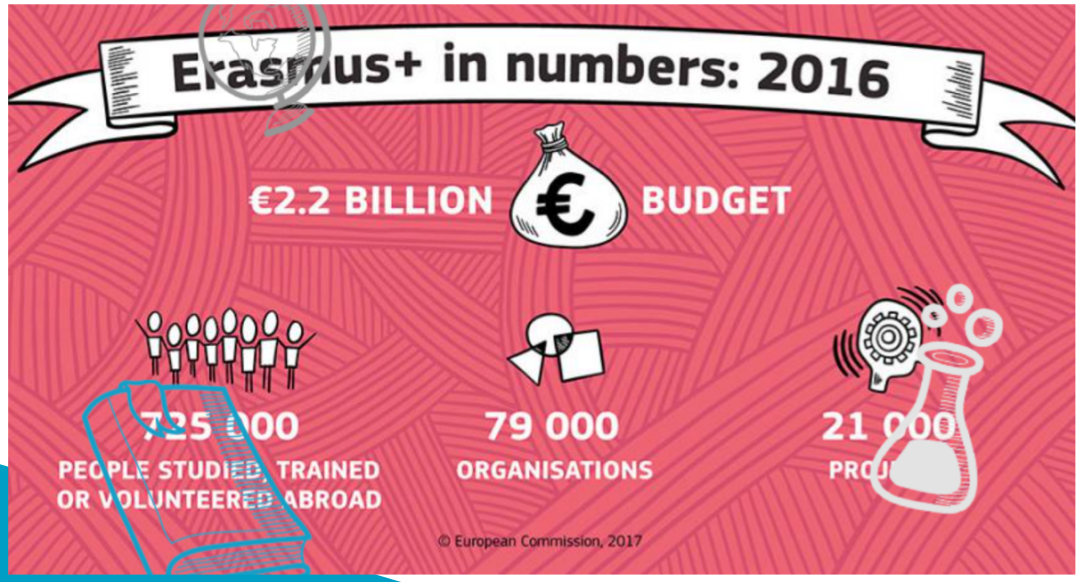


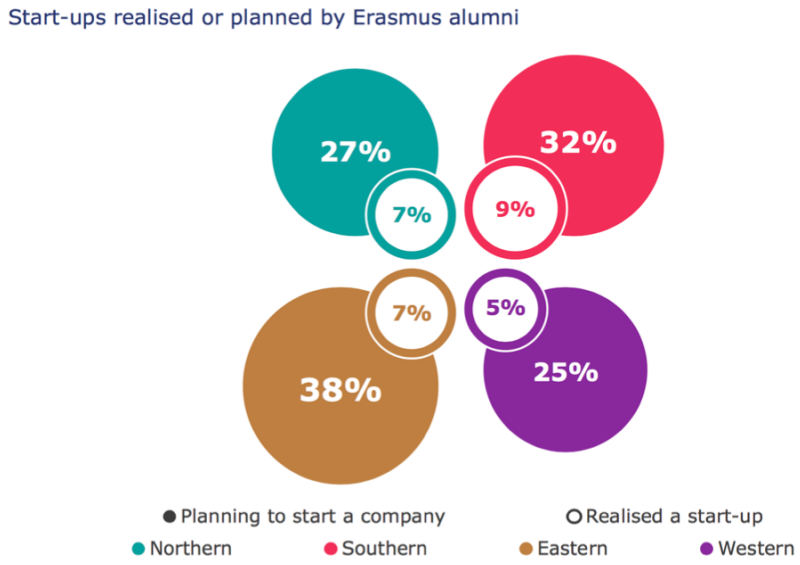
de Wit, H. et al. (2015) Internationalisation of Higher Education. Study requested by the European Parliament. http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf

Global Impact Institute

Current trends

from Input over Output to Impact





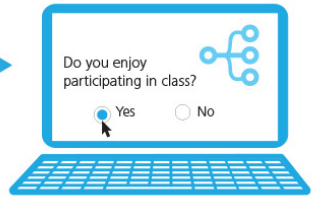
Global Impact Institute

Current trends

Figure 2. Higher education in the 20th century vs. the 21st century

Laura's mom	Laura

College decision-making process

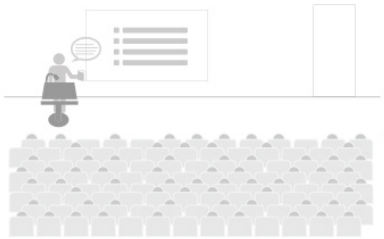


Reputation-driven

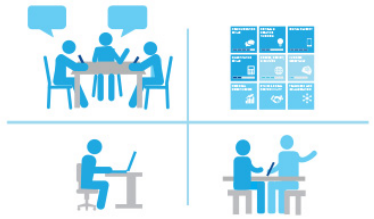
College rankings, campus visits, marketing materials, and advice from family, friends, and guidance counselors served as the main sources of information to guide students' college search.

Big data-driven

Huge strides in analyzing, visualizing, and disseminating data allow students to employ a far more data-driven approach to their college search. Social networks, big data, and analytics shed new light on factors (e.g. student debt, post-graduation salaries, etc.), enabling students to analyze the costs and benefits of different educational paths far more effectively.



Student experience

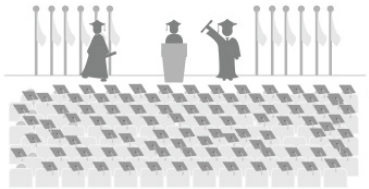


One size fits all

The business of colleges and universities was to transfer knowledge to students.

"Just right" education

Students receive access to the latest knowledge via digital platforms, develop their skill sets through mentorship, and learn to probe and push the boundaries of current knowledge and practice through immersive experiences.



Credentialing

Four-year college degree

A bachelor's degree used to provide enough basic training to last a career.

"Stackable credentials"

Lifelong learning is a permanent fixture of professional life. Educational records follow students to accurately capture the total sum of their education credentials–both traditional degrees and other certifications.

Graphic: Deloitte University Press | DUPress.com

Global Impact Institute

Internationalisation in 30 years

Global Impact Institute

Internationalisation in 30 years

Global Impact Institute

Internationalisation in 30 years

Global Impact Institute

Internationalisation in 30 years

Global Impact Institute

Prediction Internationalisation #1 …

China will be the leading internationalisation hub globally, leaving Europe and the US behind

Global Impact Institute

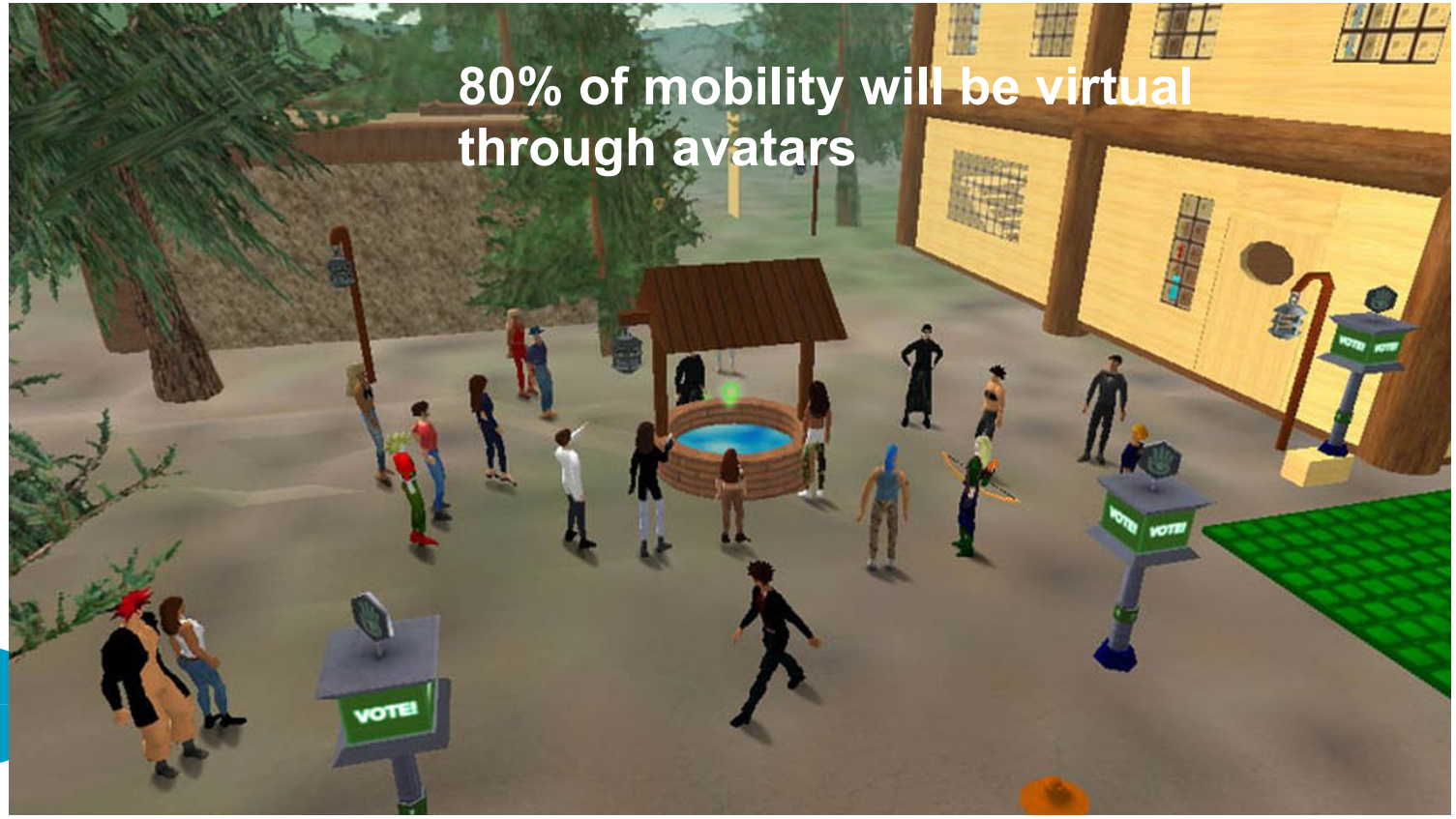
Prediction Internationalisation #2

Erasmus+ will still exist but

the major contribu-tors will be

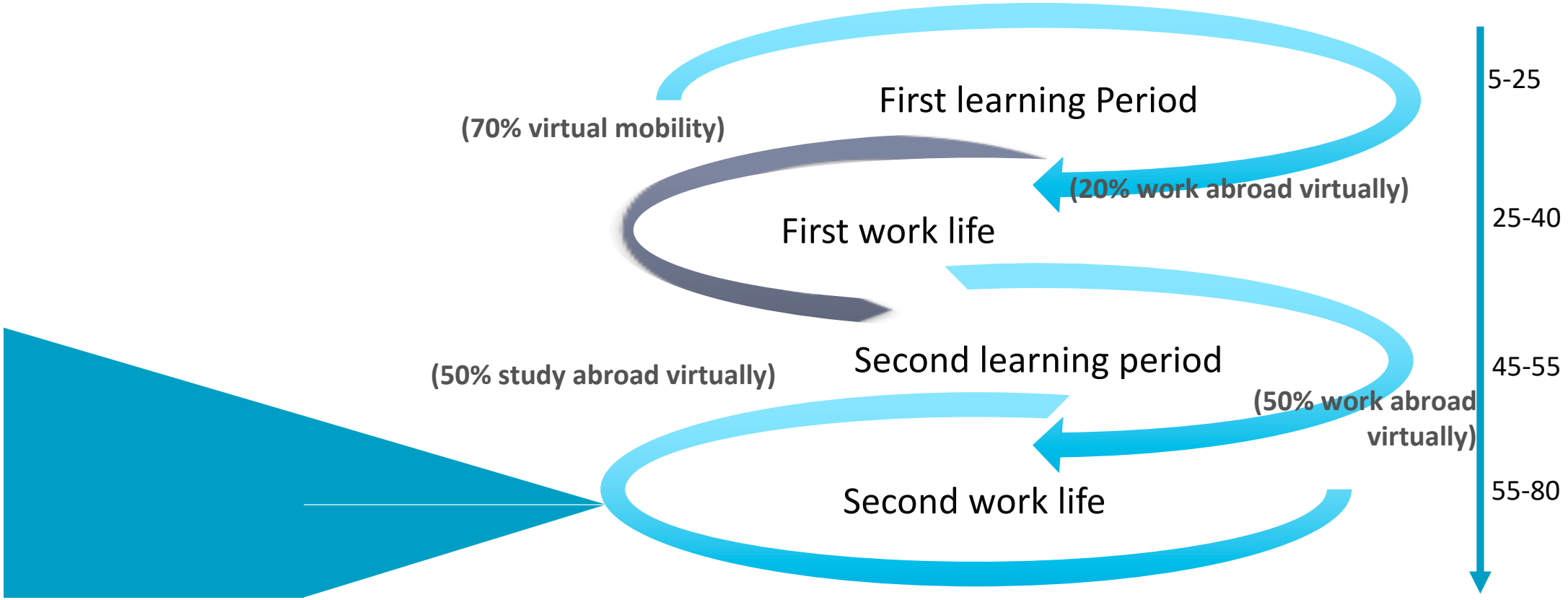
Global Impact Institute

Prediction Internationalisation # 3



Global Impact Institute

Prediction #4 - Double life circle

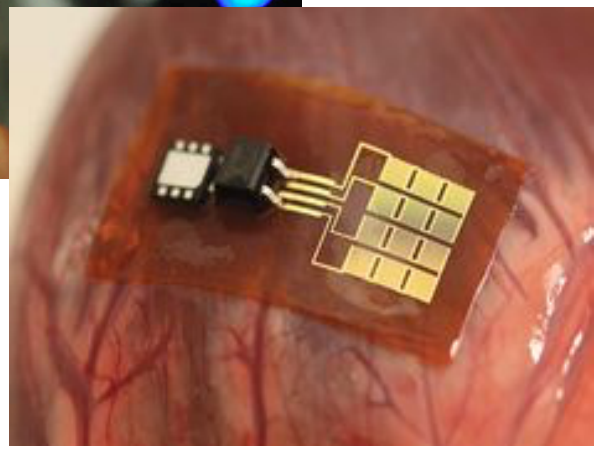


Global Impact Institute

Prediction Internationalisation #5

90% of the real analogue mobility will be done by surrogates

Global Impact Institute

Prediction Internationalisation #6

Implants will measure effects of mobility on personality and physical health