

PART
ONE

NO GOING BACK

Barton
Carlyle

EXPLORING NEW HORIZONS IN GLOBAL EDUCATION



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For

We Three in Happydrome

Roxanne, the best Eeyore

Inspirational colleagues and friends in
international education everywhere

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No Going Back: exploring new horizons in global education

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CONTENTS

FOREWORD

Above the fray: global education in perspective
Pamela Barrett

06

CHAPTER 1

On purpose: a shared response to global threats
Ailsa Lamont

14

CHAPTER 2

Off the fence: a shifting balance of power
Ann Mason

30

CHAPTER 3

Blink and you'll miss it:
key dynamics of global student mobility
Pamela Barrett

44

CHAPTER 4

Go South! The new dynamism of Latin America
Graham Wise

54

CHAPTER 5

Playing hide-and-seek with the future
Pamela Barrett

72

Biographies, references and further reading

80

About Barton Carlyle

90

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No Going Back at:
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An aerial, high-angle photograph of Hong Kong's downtown financial district. The image shows a dense, vertical cityscape with numerous skyscrapers and high-rise buildings. The buildings are packed closely together, with some featuring unique architectural designs. The city is situated on a peninsula, with the sea visible on the left side. The lighting suggests a late afternoon or early morning setting, with warm, golden light illuminating the scene. A green rectangular box is overlaid on the right side of the image, containing text.

FOREWORD

**ABOVE THE FRAY:
GLOBAL EDUCATION
IN PERSPECTIVE**

*When anything changes, you face a risk.
The way you respond will turn that risk
into an opportunity, or a crisis.*

*Pamela Barrett examines what happens
when everything changes.*

*Little planet. Aerial view of Hong Kong Downtown.
Financial district and business centers in smart city in Asia.*

CREDIT: iStock

*We shall not cease from exploration, and the end of
all our exploring will be to arrive where we started
and know the place for the first time.*

– TS Eliot



HOW DO YOU ASSESS RISK, identify opportunity, create and implement robust new strategies at a speed fast enough to move forward amid a maelstrom of change?

Compared to today, the past can seem like a model of certainty. Of course, it never was. But it was more predictable, with fewer education players in a more stable world. In today's global education market, any sense of certainty is rare. Almost everything is changing, which means that standing still is not an option.

That's why we have produced this book: No Going Back. In Part One, our aim is to identify the complex web of inflection points that will shape and inform your future strategy. From the rejection of globalization to a new world disorder, from climate chaos to the refugee crisis, from old market certainties to new education superpowers. Having identified this new landscape, Part Two will then equip you to explore with confidence the new horizons of global education. Part Three examines the future, and looks at the parameters that may help determine the shape and scope of the tasks we face. Our ambition is that No Going Back will help you reshape what success looks like in today's volatile global education market.

Of course, the global education landscape has always been changing, responding to the changing needs of generations of globally mobile students. As local education systems gear up over time to meet the needs of students, understanding population growth and economic drivers helps international education providers calibrate the size and shape of the opportunity gap, and present their offering accordingly. For a long time, international student flows have been asymmetrical, with Western institutions benefitting from the aspirations, global perspectives and income of hundreds of thousands of globally mobile students. In return, students have benefitted from outstanding educational and personal experiences that have gone on to enrich the lives of their families, communities and broader society, whether they have remained in the nation of their higher education, or returned to their home country.

Under the surface, though, a number of trends have been discernible. As national economies have grown and matured, local higher education provision has typically become more appropriate to the demands of the local population, meaning that the offer

to local students can more reasonably rival western Universities/ Colleges, and in some cases, can exceed the offerings in many western institutions. The cachet of an international education lingers for many, but local or regional education alternatives have become increasingly feasible, or at least considered as a viable choice.

Many countries' governments have seen the benefits of hosting international students and have established international education strategies that seek to participate in the industry, welcoming students from the region, or more broadly. Education systems in the traditional host destinations too, have been changed and have responded to the demands of what has increasingly become (by virtue of the monetary value and competitive challenges) an industry. TNE is the archetype: transnational education (TNE) offers education providers the opportunity to deliver educational programming in a third country or online, increasingly with the collaboration and partnership of local partners, (whether commercial education providers or other commercial entities, or regional or national governments). As such,



Our ambition is that No Going Back will help you reshape what success looks like in today's volatile global education market.

the boundaries of what is international become blurred, but it can be argued, to the benefit of international students, who have significantly more choice of quality education provision.

Pathway provision also fits into the prevailing paradigm, where students can benefit from additional academic and language (typically English) programming in preparation for their substantive academic programming, and imbalances in the structures of local education systems and qualification regimes can be balanced. Commercial partners' offerings are the predominant model, and many higher education institutions have come to rely on the increasingly diverse and sophisticated pathway schemes to secure pipelines of international student applicants to their programs.

Such has been the growth trajectory of an immensely lucrative, successful international education industry.

Underpinning these models of growth and diversification of offering, whether through the geography or technology of delivery, has been the notion that international education is a public as well as a personal good into which investment is appropriate. This premise sits comfortably within the overarching paradigm that globalization is a positive force; that it puts into effect the natural interdependence of the world's economies and society (indeed that there is something that can be described as a global society); and that it is a progressive and unstoppable force for change. As international educators, we have all ascribed to the idea that our field supports the societal benefit of mutual global understanding, and that this is the basis of growth and sustainability. Key issues such as climate change provide an appeal to the possibilities of international education to contribute some solution to the world's most pressing global threat. International education matters.

So what happens when the fundamental tenets of our assumptions about globalization are challenged by the rise in nationalisms and the fracturing of global society and economy?

The premise of this book is that the philosophical rationale of globalization is not critical to the ongoing success of multiple international education industries, but that the restoration of the principles of globalization predicated around mutual understanding and societal benefit provides a needed framework for what otherwise can be a challenged and fractured, purely

What happens when the fundamental tenets of our assumptions about globalization are challenged by the rise in nationalisms and the fracturing of global society and economy?

commercial process. However, we need to address what international educators can do to respond to the new normal, to consider how best to deliver international education that has integrity, that serves global needs, and is successful within the more complex, competitive environment we face.

Our argument is in part that understanding the landscape and the implications of the last few years of turbulence is important, but that responding to the already present underlying trends and challenges that have erupted from recent geopolitical fissures is mission-critical.

The primary implication for us of this approach is that proximity to the markets in which we operate is essential for commercial success; but that a more mutually beneficial collaboration is required to genuinely offer educational opportunity that has future resonance for populations both domestic and international.

Therefore, the capabilities that international educators, as well as the institutions that they serve, will need in order to survive and flourish in the future, will include: astute commercial judgement; the flexibility to adapt to changing, challenging and competitive environments; and the willingness and ability to invest in collaborative partnerships that achieve mutual and sustainable benefit.

A capability around commercial prowess is evidenced by a number of successful models in the field (and understood through a best practice approach which we will describe in Part Two of this book). Flexibility and speed of response capabilities are all about market understanding and investing in a new level of insight capability to support the development and growth of demand-led programming. These are topics we explore in Parts Two and Three of No Going Back. And finally, an essential skillset around

(and commitment to) partnership development is a result of a genuine commitment to engagement. We note in Part Three that intentional, meaningful partnerships are made possible by the adroit exercise of strategic commercial prowess and founded in market context and insight. In Part Three we hope to interrogate the boundaries of that context and provide a framework to examine possible futures.

Of course, our institutions require us to be successful before we can invest and stretch our resources and capabilities, so a further element must be added, and that is an understanding and application of the principles and practice of risk management to international education.

All in all, the role of international educators has never been more vital, as advocates for the benefits of international education but also as successful practitioners in some of the most difficult set of circumstances that globalization has ever faced.

We hope that our book will provide some practical advice and substantive support as we face the challenging times ahead.



Pamela Barrett, May 2019



CHAPTER 1

**ON PURPOSE:
A SHARED RESPONSE
TO GLOBAL THREATS**

While the context, strategies and plans of global educators may constantly evolve, what about 'The Why' of international educators?

Ailsa Lamont examines the issue of underlying purpose, and why this matters now more than ever.

Changing how we use the earth: the Cayambe Valley in northern Ecuador once produced corn, potatoes, beans, quinoa, and squash. Today, in vast greenhouses, you will find roses and other cultivated flowers ready to be cut and flown to the US market.

CREDIT: landsat.visibleearth.nasa.gov/view.php?id=91720

*The person without a purpose is like
a ship without a rudder.*

– Thomas Carlyle



I HAD WORKED IN INTERNATIONAL EDUCATION for almost ten years before I first heard anyone talk about the purpose of our work. With hindsight, this omission is glaring as our area of endeavour clearly attracts many people who are passionate about the value of a global education. There was an implicit shared understanding that we were on the side of the angels, but little explicit attention devoted to why we did the work we did. Ask one hundred international educators about the value of overseas study and you will likely receive a hundred different answers; each response shaped by the respondent's role, personal experience and, crucially, their country's level of development.

As a broad rule of thumb, the benefits commonly cited when people from wealthy countries elect to study overseas converge around personal attributes such as broadening horizons and building intercultural competence and understanding. In contrast, the gains for students from low and middle-income countries are couched in significantly more utilitarian terms around gaining access to higher education, post-study work rights and employment or migration outcomes. Rarely is either list topped by the intention to make the world a better place.

My personal experience of overseas study was incredibly empowering and certainly influenced my emigration and career choices. Particularly significant was the semester spent in provincial Russia in 1988, and my work in Russia and Ukraine after the collapse of the USSR in 1991. Witnessing how societal and economic constructs were dismantled, rebuilt, knocked down then rebuilt again was a seminal lesson in how everything that has been made by humans can be remade by humans: study abroad as a portal to systems change.

The amorphous nature of international education's mission often magically solidifies when national and institutional strategies are written, leaving us with a lingering sense that their authors have all

Ask 100 international educators about the value of overseas study and you will likely receive 100 different answers.

plagiarised the same strategy textbook; so often do they expound on preparing the next generation of global citizens, empowered to tackle the wicked challenges of our time. Innovators, entrepreneurs and leaders, all.

Clearly these aspirations are admirable, and particularly vital as we move into the unknown territory of the Anthropocene age. We face multiple, complex and intersecting challenges, not least among them the decline of the post-war international order, the mass displacement of people and the existential threat caused by climate breakdown. These challenges transcend national boundaries and demand a rapid and multidisciplinary response: who better to provide that response than well-travelled, tertiary educated and globally literate citizens?

Our sector does indeed have a critical part to play in tackling these wicked problems but how well have we articulated this sense of purpose and to what extent does it actually guide institutions' operations and shape their offering to students? In this chapter we turn our attention to the role that international education can play in nudging the global balance of scales towards the positive, and crucially we explore the gap between what is being done and what is needed.

The dangers of unintended consequences

To illustrate these points, we will examine access to education for refugees and action to tackle climate change, but first let us take a short detour to visit one of the inherent risks involved when venturing into the realm of the explicitly ethical, namely, unintended negative consequences. By its very nature, our sector is made up of highly educated, curious and culturally competent people and yet our experience of global engagement is littered with the detritus of good intentions gone bad.

We have already touched on the absence of a unifying, clear mission for our sector. This should not be surprising given the complexity and diversity of global mobility, however this statement is also highly dependent on context. It is only in high income countries that universities have the privilege of deciding whether to take an active role in tackling social issues. Some years ago, I was fortunate enough to spend time at a university in Papua New Guinea. Not only did that institution play a vital and explicit

role in PNG's national development, designing its curriculum and resources to meet skill shortages and development priorities, it also housed all students and staff on campus – in part for reasons of safety – and provided the only reliable internet connection and source of electricity in the town.

The example I will share here highlights my own ignorance of the negative effects of a development I had previously viewed as entirely positive. I was at the time the International Director of a university in neighbouring Australia. When I learned that eight academic staff from one of the PNG university's faculties had been awarded full postgraduate scholarships to study in Australia, I was delighted. I saw this as a triple win: a great opportunity for the scholars themselves, good for the Australian universities that would host them, and valuable for the long-term development of PNG.

This rosy view was shattered when I discovered that the faculty in question had only 10 qualified academic staff in total, and that the imminent and unplanned loss of 80% of their brainpower would cause the development of new curriculum and the roll-out of new degrees to crash to a halt. Furthermore, as the scholarships did not cover the cost of bringing families, the university would have to continue to provide scarce on-campus housing to the academics' families for the duration of their time overseas, meaning they would be unable to accommodate new academic staff even if they could find suitable replacements. The institution's and the nation's development stalled at a stroke.

I share this example not to suggest that we should not attempt to contribute to international development and the betterment of society, but as a cautionary tale. Good intentions on their own do not suffice; they must be matched by an investment in time and effort to understand the local context of our partners and to co-design our approach if they are to have real impact.

Despite the absence of any official, overarching mandate to use our influence for the broader good, we still find abundant examples of universities stepping up to meet local and global challenges.

And yet we persist

Despite the absence of any official, overarching mandate to use our influence for the broader good (in contrast to just for the good of our students and our institutions), we still find abundant examples of universities stepping up to meet local and global challenges. Our sector is also highly adept at adapting to the shifting social mores of our time. In Australia for example, as in many other countries, the sectoral conversation has expanded significantly of late to embrace important issues around mental health, sexual harassment, and LGBTIQ rights, reflecting progressive trends in society at large.

A growing number of institutions around the world have committed to working towards the Sustainable Development Goals, and there is even a 'network of networks', the Global Alliance of Tertiary Education and Student Sustainability Networks established by EAUC with the express aim of providing a more powerful voice for the tertiary education sector to contribute to global developments.

Displaced people and refugees

This drive to address pressing social needs has found expression in a plethora of initiatives and networks to support displaced people and refugees to gain an education or recognition of prior learning. Many of these initiatives are exemplary: The World

University Service in Canada (WUSC) sponsors refugees to study at Canadian universities and is funded primarily by student contributions. The Institute of International Education which was founded 100 years ago in the aftermath of the First World War on the premise that international exchange could make the world a more interconnected place and contribute to keeping the peace, recently launched its Program for Refugee Educational Placement (PREP) which helps place people along the Thai-Myanmar border into courses across Southeast Asia.

In Europe, the sector has rallied in various innovative ways, from the Norwegian quality assurance agency, NOKUT's push to create a global qualifications passport to help refugees bypass issues around recognition of prior learning, to the online education provider, Kiron, which has negotiated entry pathways with partner universities to accept refugees who have completed a free MOOC.

There are countless more examples where the sector has been able to put its unique knowledge and experience of educating people from across the globe to good use, and yet, this is but a drop in the ocean.

One in every 110 people on earth is displaced. Their number is higher now than during the previous peak after the Second World War: 68.5 million people, including 25.4 million refugees (United Nations, 2019).

For the vast majority of people in this situation the very fact

68.5m
FORCIBLY DISPLACED PEOPLE WORLDWIDE

*One in every 110 people on earth is displaced.
Their number is higher now than during the
previous peak after the Second World War.*



of displacement shuts off or at best interrupts their access to education. Recognition of credentials or prior learning can be problematic even when educational systems are similar and applicants have access to documentation. For people forced to leave their homes, often operating in a new language and unfamiliar with local systems, this can form an insuperable barrier even on the rare occasions that education options are available. This loss of human potential is not just a tragedy for the individuals affected but for society as a whole, which loses their ability to contribute. As with action on climate change, many public organisations are plugging gaps or addressing failures in government policy, and universities, being in the business of educating as a public good often find themselves stepping into the breach.

The number of displaced people is still rising and is unlikely to shrink any time soon. Quite the opposite, in fact, as the effects of climate change hit: projections vary significantly, from 25 million to 2 billion people, but the most often cited studies forecast 200 million environmental migrants by 2050 (UN Organization for Migration, 2019). Desertification, drought, crop failure, the aftermath of natural disaster as well as political instability and conflict caused or exacerbated by these natural phenomena all play a part. Many experts consider that a contributing factor to the conflict in Syria was the severe drought preceding it. Aside from the vast human misery, it is sobering to consider the extensive ripple effects arising from that conflict: the political backlash in parts of Europe which may have fed into the rise of the far-right and was certainly exploited by some in the Brexit campaign. Imagine the impact as climate change multiplies the likelihood of similar events and intensifies their effects.

Climate Action

It is a striking example of injustice that the countries which have contributed least to the accumulation of greenhouse gases in our atmosphere are those disproportionately affected by the effects of climate change.

The world has warmed by roughly 1°C since pre-industrial times because of human activity and this temperature rise is already making itself felt in the form of stronger storms, more



It is clear that we need leaders who have a global perspective, the skills to work across borders, to think creatively and to communicate effectively.

erratic weather, dangerous heatwaves, longer droughts and an extended bushfire season. At a 1.5°C temperature rise – the lower end of the Paris Agreement targets – this trend will intensify, accompanied by large-scale disruption to infrastructure and migration patterns. Our current rates of warming are around 0.2C per decade and if we stay on our current emissions trajectory, we will see warming of more than 4°C by the end of this century. That would be enough to see off civilisation as we know it in much of the world, and most certainly in the regions most globally mobile students come from. Many major cities in India and parts of the Middle East would literally be lethal (Mani M, et al. 2018) and whole regions of Africa, Australia and the United States, as well as parts of Asia and South America would be uninhabitable as a result of direct heat, desertification or flooding.

This is as existential as a crisis can come. Catastrophe can still be averted but according to last year's UN report (IPCC 2018) we have at most another 11 years to reverse the situation. The 15 largest economies must cut their carbon-dioxide emissions in half over the next four decades (at the moment, emissions are growing each year and show no signs of dropping).

WORLD'S HIGHEST GREENHOUSE GAS EMITTERS

The top 4 emitters make up over 50% of total emissions

CHINA
26.6%

USA
13.1%

INDIA
7.1%

RUSSIA
4.6%

According to Vox Magazine in 2014, To put that in perspective global emissions declined by just 1 percent in the year after the 2008 financial crisis, during a brutal recession when factories and buildings around the world were idling. To stay below 2°C, we may have to triple that pace of cuts, and sustain it year after year.

It is clear that we need leaders who have a global perspective, the skills to work across borders, to think creatively and to communicate effectively if we are to solve this crisis. Never has it been more important that there be an abundant supply of global citizens who understand the importance of evidence-led action and who respect scientific findings. In other words, we need people who are not just educated but who are globally educated.

There is no doubt that many institutions do essential work around climate change. It is universities and research institutes that produce much of the data and are often the source of the loudest voices calling for action. They are home to most of the researchers seeking technical solutions. Many institutions invest heavily in making their buildings more sustainable, sourcing green power and cutting their operating carbon footprint.

There appears to be an element of cognitive dissonance however when it comes to international education, perhaps attributable to reluctance to confront the inescapable conclusion that our operating and business models depend on our ability to fly around the world.

14
MEGATONNES
CO2 EMISSIONS
PER YEAR
ASSOCIATED WITH
INTERNATIONAL
STUDENT MOBILITY



FALLING
CO2 EMISSIONS
PER STUDENT
BUT...



RISING
NUMBER OF
STUDENTS

**ANNUAL GLOBAL
TEMPERATURES**

**1850-
2017**

*The colour of each stripe
represents the temperature of a
single year. All other superfluous
information is removed so that
the changes in temperature are
seen simply and undeniably.*

SOURCE: <https://www.climate-lab-book.ac.uk/2018/warming-stripes/>

Carbon emissions associated with global mobility are rising due to increased numbers of mobile students, despite the fall in emissions per student, and are now estimated to stand at 14 megatons per year (Shields, 2019). A significant proportion of this is caused by emissions from air travel; one hour of flying generates CO2 emissions of 250 kg (Carbon Independent web site). Anyone wishing to find out more should read the excellent article calculating the flight-related carbon footprint of international students to Australia (IEAA Vista, 2015).

International education is both part of the problem and part of the possible solution. I would not go so far as to suggest we should never fly but there is certainly much more that we can do to reduce and counter-balance our emissions. Imposing levies on flights and channelling the proceeds back into sustainability funds to support green projects is an approach taken by some, notably Gothenburg University in Sweden. The University of Lausanne now requires staff and students to take the train rather than fly for distances under 500 km, an approach which clearly would work better in Switzerland than Australia, but it is indicative of a broader shift. Conferences are increasingly being offered as 'no fly' events where everyone must join virtually if they cannot reach the venue by low-carbon means.

While this is not yet part of most universities' operational thinking, I expect the day is coming shortly when institutions will invest in systematic offsetting of flights as a minimum and will explore alternative business models with a greater focus on proximity to market. This latter change would have major implications for international student recruitment, mobility and transnational operations.

There are other external forces at play: the generation that spawned the Climate Strike movement will be quick to spot when institutions fail to take climate change seriously. 89% will switch brand based on green credentials (Cone Millennial Cause Study, 2017). Up until this year however, prospective students have not had any real guide to point out which universities are taking climate action seriously: this changed with the launch of the new Times Higher Education Impact ranking which measures university performance against 11 of the 17 Sustainable Development Goals, including climate action, affordable and clean energy, and sustainable cities and communities.

Studies have shown that once 10% of a population advocate change, change will follow automatically.



Numeracy and literacy used to be reserved for a privileged few, but we have experienced such profound societal change over the last few centuries that they are now considered fundamental human rights. An equally radical shift in awareness and understanding of how to solve the climate crisis is required if we are to avert climate breakdown and prevent a further, unprecedented mass forced migration of people. Our sector could make a vital contribution by introducing basic climate action literacy as a standard graduate attribute for all. This could be especially impactful when considering that the three largest greenhouse gas emitters in the world are China, the USA and India, all of whom have significant populations of globally mobile students.

Another perspective not often given on climate change is that it presents an incredible opportunity. It creates a powerful vehicle to build many of the transferable skills which institutions might struggle to deliver alongside the core degree, and for which students and employers often clamour; creative problem solving, lateral thinking and the ability to work in multi-disciplinary teams.

Studies have shown that once 10% of a population advocate change, change will follow automatically. International education has incredible reach, resources and purchasing power and more than that, is peopled by professionals with the lived experience of international cooperation. If we choose to operate to our full potential, our sector could model the leadership and commitment to change that the world needs and that students increasingly demand. The time for us to tolerate any ambiguity of purpose is past: what is needed now is for us to live up to our promise. There really can be no going back.

See page 84 for references and further reading.

CHAPTER 2

OFF THE FENCE: A SHIFTING BALANCE OF POWER

From geopolitics to soft power diplomacy, via university global rankings, Ann Mason examines change in the world of global education.



In a world where some agitate for walls and protectionism, where next for globally connected education? CREDIT: iStock



*In times of rapid change,
experience could be your worst enemy.*

– J. Paul Getty

ACROSS THE WORLD WE SEE that changing understandings of globalization, of geopolitical interests and national priorities have already altered the international education landscape. New national players are consolidating ever larger shares of a shifting global market. The changes we are seeing are about more than education, with leadership in knowledge, science and technology increasingly a way of furthering the strategic national interest of most nations.

Higher education strategies that pursue world-class education and research institutions, and the talent needed to drive knowledge-based economies, are a critical component of national security policies that seek economic strength, prosperity and global competitiveness. States that ignore this geopolitical axiom do so at their peril. Those that recognize the national security-higher education symbiosis are poised to be among the new global leaders in international education.

Change, a century in the making

Although international education made its debut on the world stage in the aftermath of WWI, it wasn't until the triumph of western democracies and the establishment of a liberal global order at the end of the Second World War that international education as practice and policy took root. The fundamental premise of international education as a positive force for enhancing global stability through mutual understanding was a reflection of Western, liberal thinking regarding internationalism that was embedded in the multilateral post-war institutions for maintaining international order. International education was fully aligned with the economic interdependence and globalization that developed over the following decades. Greater openness, interconnections and exchanges – of everything from goods and services, to ideas, as well as to students and scholars – were

*Those that recognize the national
security-higher education symbiosis are
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leaders in international education.*

largely considered a force for peace and well-being on a global scale.

The globalist backlash and rise of nationalist sentiments and policies throughout today's world notwithstanding, most stakeholders in the field continue to be true believers in the power of international education to enhance student learning, to contribute to global competitiveness and to drive the development of new knowledge necessary to solve the world's most pressing challenges. Higher education institutions, international organizations, private foundations and education providers share the dominant, normative narrative of international education and exchange as a driver of peace and progress, even while acknowledging the commercial rationale that underlies many internationalization initiatives.

The internationalization of higher education is, however, about far more than learning, mutual understanding and academic cooperation expected from scholarly and student exchanges. It is also a massive, multibillion dollar industry. It is a fast track for acquiring leading scientific and tech talent. It is a strategic tool in the arsenal of state power and development, and it figures prominently in public diplomacy and foreign relations.

These geopolitical underpinnings of international education are nothing new. The Cold War race for military superiority depended on dominance in science, engineering and technology. In both the US and Soviet blocs, close ties among the military, the defense apparatus, and universities were key to the research that spurred forward weapons programs, the arms race, space exploration and industry. National security considerations underlay a host of international initiatives during this period: the international contest for German scientists, the Sovietization of Chinese technology and higher education in the 1950s, government funding of research and universities in the U.S. following the successful Soviet launch of Sputnik, and even academic exchanges carried out between the Soviet and American academies of science, to name a few.

The interplay we see among higher education, internationalization and geopolitics is no less compelling today than it was during the last century. Just as the international education community responds to changing global conditions and needs, national governments around the world also shift policies and recalibrate

priorities as international relations and their own national interests change. Three geopolitical dynamics stand out in the current international education landscape of turbulence and global retrenching.

- **First, university rankings as a component of state power used by nations for geopolitical positioning and prestige.**
- **Second, international education as soft power for advancing public and cultural diplomacy goals.**
- **And lastly, international exchange as a strategic tool to acquire the science, technology and talent needed for economic competitiveness, and as a lucrative commercial enterprise with staggering implications for domestic economies.**

Competition, prestige and higher education rankings

If the first generation of international education consisted largely of student and scholar exchanges, internationalization today reflects the globalization of higher education and the production of knowledge. Internationalization strategies encompass high-producing global research networks and collaborations, access to global scientific talent and resources and overseas branch campuses to better compete in the global higher education market.

Rankings are the highly desired imprimatur of a university's standing within the global knowledge economy. With their power to confer reputation and prestige, global rankings have themselves become arenas of competition among universities at the global and regional levels, as well as within nations. The most sought after spots on Shanghai University's Academic Ranking of World Universities (ARWU), Times Higher Education World University Rankings (THE) and QS World University Rankings translate into access to top-performing students and faculty, research funds, lucrative partnerships and endowment contributions. Such advantages build even further capacity for achieving global excellence in training, research, scholarship and innovation, which feed back into favorable rankings.

It's hardly a surprise that universities dedicate significant institutional resources to securing and maintaining top global rankings. Likewise, national and even provincial governments have a keen stake in the performance and quality indicators of



China's national strategy of creating world-class universities launched in 2015 appears to be paying off.

their HEIs. Governments leverage their universities and higher education systems to compete with other nations in the global economy of science, technology, innovation and investment.

Since global rankings were first developed in 2003, the most coveted positions have been held by the oldest, most established universities in the U.S. and the U.K. that were already deeply engaged in the research-intensive activities that rankings reward. The ARWU and THE 20 top-ranked universities both include just one European institution – ETH Zurich. QS's rankings have been somewhat more fluid and have fielded greater national diversity. Its 2019 top 20 list includes three East Asian institutions, including the National University of Singapore, Nanyang Technological University, Singapore, and for the first time, a Chinese HEI – Tsinghua University.

China's national strategy of creating world-class universities launched in 2015 appears to be paying off. The Chinese government's Double First Class Project is the most ambitious of the "excellence initiatives" implemented in recent years by the governments of Russia, Japan and a number of European countries, with a budget of over 6 billion USD and the goal of having 42 of its universities break into the global top 200 ranked institutions by 2050. These government-sponsored strategies seek to improve the quality, capacity and international prestige of their universities, and to earn a competitive position in the highest echelons of the rankings. The injection of public funds, institutional mergers, international partnerships, prioritizing of strategic fields in terms of research capacity and publications and the development of research centers are just some of the policies implemented by governments to develop more internationally competitive universities.

The notable performance by Tsinghua University, and the addition of 24 Chinese universities to the ARWU's top 500 list, underscores the Chinese government's commitment to create world-class universities that go head-to-head with elite institutions in the West. Its drive for highly-ranked institutions stems from a geopolitical imperative: higher education and research systems are vital to

Students attend the graduation ceremony of Wuhan University in Wuhan, capital of central China's Hubei Province, June 22, 2017.

CREDIT: Xinhua / Alamy Stock Photo

national security, global power and influence. Chinese leaders are betting that creating a global higher education center, producing leading research and attracting the world's top students, faculty and tech innovators will provide an advantage in the global competition for science, technology and innovation.

Higher education, public diplomacy and global influence

Governments around the world deploy a host of public diplomacy programs to advance their national interests. International education and educational exchange are among the most valuable and high impact tools in the public diplomacy agenda.

Public diplomacy is the arm of foreign policy that informs and communicates with people and members of society in other countries. This form of soft power is often referred to as people-to-people diplomacy because it is not directed at other governments, but rather to civil society. Using a broad set of information, culture, sports and education programs, governments seek to project a positive image of their own nation, expand their reputation and extend their influence with other societies. Foreign policy exercised through soft power aims to make a country's culture, way of life, values and political ideas appealing to other nations.

The United States, Canada, the UK, Australia, Brazil, Germany, France, Spain, Russia, Japan, and more recently China, all successfully leverage their higher education systems for strategic purposes. The U.S. State Department operates a large portfolio of federally-sponsored student and scholar exchange programs. Its flagship Fulbright program has the stated purpose of promoting mutual understanding between the people of the United States and the people of other countries. Other programs support the development of strategic partnerships between American and international universities, train language teachers, and offer leadership development opportunities in the U.S., all while promoting democratic values.

The British Council, a state-owned enterprise sponsored by the British Foreign Office established in 1934, has the mission of promoting wider knowledge of the UK, of British culture and the English language in other countries. Its higher education agenda also purports to promote friendly knowledge and understanding

between universities in the UK and HEIs abroad through academic exchanges, partnership development and the global marketing of British HEI's.

Paradoxically, as nationalist attitudes are ramping up in the UK and the U.S. with important repercussions for their international education programs, China is implementing an ambitious strategy to globally position its higher education system and promote international exchanges to its universities. Student and scholar exchanges, degree programs offered in English, and university consortia with world regions strengthen international academic cooperation at the same time as cultivating favorable attitudes toward China and promoting Chinese heritage and values. The Chinese government-funded Confucius Institutes (CI) on university campuses around the world are intended to spread Chinese language and culture. Recent closings of some CIs in Europe and the U.S. have taken place due to a purported lack of academic freedom and excessive operational control by the government. In the case of the U.S., the pressure brought by Congress and security agencies to close the CIs stems from concern over Chinese government influence and the spreading of Chinese political values. It also is an acknowledgement of the efficacy of Chinese public diplomacy and of the underlying geopolitical interests of international education programs.

These programs all share the public diplomacy precept of influencing international audiences so as to advance a country's own foreign policy priorities and national interests. Positive exchange experiences lay the groundwork for the development of a global network of social, educational, commercial and political relationships that enhance a nation's international reputation, influence and positioning. Many students and scholars who have the opportunity to study abroad become leaders in their home countries in government, business and science, with favorable views of the society and values they were exposed to. The Fulbright program alone counts among its alumni 37 current or former heads of state, underscoring the strategic value of public diplomacy's international education agenda.



Internationalization and economic prosperity

For educators, the value proposition of international students and scholars is principally academic: they enhance the teaching and learning experience, contribute to a more globally engaged campus community and advance research and knowledge production.

There is also an important economic dimension to international education and exchange programs. They generate billions of dollars in revenue, create thousands of jobs, and contribute to economic competitiveness. Roughly five million students studied outside their home countries in 2017, with estimates of this number growing to at least seven million by 2030, with massive economic implications. The 1.1 million of these students who studied in the U.S. not only contributed critical tuition revenue in their universities, but they also generated \$42.4 billion in export revenue, making international education the country's seventh largest export. They were also estimated to have created or sustained more than 455,000 jobs. The Australian Bureau of Statistics reports that international students injected \$32 billion into the Australian economy in the period ending June 2018, generating jobs and boosting wages. The education of international students is now Australia's third largest export, behind only iron ore and coal. A new report commissioned by the Higher Education Policy Institute and Kaplan in the UK calculates that tax revenues alone from just one annual cohort of international students during its first ten years following graduation exceed US\$4 billion. This same study concludes that international graduates of UK universities meet critical skills shortages, while Nafsa reports that international students are crucial drivers of innovation, scientific discovery and new business development in the U.S. Nearly one quarter of the founders of \$1 billion start-ups in the U.S. first came to the country as international students.

While the UK and the U.S. dither over narrow, nationalist political agendas and erect barriers to immigration, the global international education market is undergoing seismic shifts. Trump administration visa restrictions, prohibitions on security-sensitive research and limits on post-graduation work opportunities are having the intended effect on flows of international students and scholars. Although still the leading destination for international



24%

**OF THE FOUNDERS OF
\$1 BILLION START-UPS IN THE U.S.
FIRST CAME TO THE COUNTRY AS
INTERNATIONAL STUDENTS**

Students' decisions about where to go abroad to study are the result of a complex mix of academic, financial and cultural factors.

students, overall U.S. market share has eroded with an unprecedented 6.6% decrease in the number of international students enrolled in 2018, doubling the previous year's decline. The U.K., traditionally holding the position of second-most popular international student destination worldwide, saw a 3.6% increase in 2017-18, although its total market share has decreased. Brexit fallout is widely expected to take a systemic toll on international student enrollments and the presence of international faculty in British universities.

In contrast, Australia, China and Canada are implementing national strategic plans designed to capture a larger share of the international education market, strengthen their economies and drive innovation and competitiveness. Canada's International Education Strategy, considered a cornerstone of its economic development and future prosperity, goes far beyond the goal of capturing additional tuition fees. It offers work opportunities and pathways to permanent residency for international students so as to attract global talent vital to invigorate its labour market. Canada's Bureau of International Education reports that fully 60% of Canada's international student population plans to apply for permanent residency upon graduation. Canada has had double-digit growth for two consecutive years, with nearly 600,000 students from other countries studying in Canada in 2018. Australia's National Strategy for International Education 2025 has continued to strengthen the nation's brand as a top study abroad destination. International students grew by 11.4% in 2018, following a 12.6% increase in 2017. If Australia's growth stays the course, it is expected to edge out the UK's second place spot in the global education market, this according to a recent study by the Centre for Global Higher Education at University College London. Post-graduation work and permanent visa opportunities for high demand skills and professions are among the leading

draws to study in Australia. The Chinese government's strategy to recruit international talent, which has resulted in a more than tenfold increase since 1995 and is close to hitting the half-million mark, is about gaining access to top science and tech talent to drive competitiveness in key sectors. Foreign students that have completed graduate studies in China are eligible to apply for work visas. Japan has also adopted policies that allow international students to stay on and work following graduation.

Students' decisions about where to go abroad to study are the result of a complex mix of academic, financial and cultural factors. Increasingly, visa and immigration policies, opportunities to work and carry out research, and the potential for permanent residency and professional development figure into this choice. Governments that strategically leverage their higher education systems to attract international students not only are on track to become world leaders in education, but they also are gaining access to the talent needed to strengthen their economies and drive innovation and competitiveness.

See page 84 for references and further reading.

CHAPTER 3

**BLINK AND
YOU'LL MISS IT:
KEY DYNAMICS OF
GLOBAL STUDENT
MOBILITY**

Trains, planes, and trusty bicycles transport students across the globe. But where are they heading, and why? Pamela Barrett takes a moment to take stock.

In the eye of the storm: a Bangkok traffic co-ordinator keeps a clear view in a fast-moving world. CREDIT: iStock



In God We Trust. All others must bring data.

– W Edwards Demming



WHILE PAST TRENDS ARE AN INSUFFICIENT GUIDE to the future, clearly, they are still necessary. It is therefore important to take a look at the ebbs and flows of international student mobility, to discern the patterns that illustrate key drivers for the future. What follows is a compelling view of the rapid changes in the source countries for global student mobility since 1998, recorded by one of the main data-gatherers in the international education field, UNESCO's Institute for Statistics (UIS) in its annual data summary (Total outbound internationally mobile tertiary students studying abroad)¹. The story has been mapped into an infographic format so that we can better see the contours of population changes. With permission, we have also mined the inestimable resources of ICEF Monitor to look at their ongoing narrative on international education trends. <http://monitor.icef.com>

The combination of three factors are the key drivers for global student mobility, and these are the elements we see illustrated in the data. Countries with the following indicators are likely to produce the largest globally mobile international student populations.

Economic forces

Strong economic growth, particular patterns of wealth distribution to produce a growing middle class (as a proxy indicator for affordability), and an economic infrastructure which features a demand for a highly educated workforce;

Demographics and structure of education systems

A significant excess of demand over available local supply of higher (postsecondary/tertiary) education resource of a strong academic quality as the strongest "push factor" for students to undertake award-based programmes (though we note that due to the inclusion in the UIS data of non-award based programming such as study abroad, participating countries in EU mobility programmes feature strongly in the overall flow picture);

Addressability

Countries where international institutions (and an agent network) might effectively and safely recruit students for regional or international programs. Here, the key factor is political stability, cultural proclivity for the value of international education and the presence of a strong, or developing, travel infrastructure.

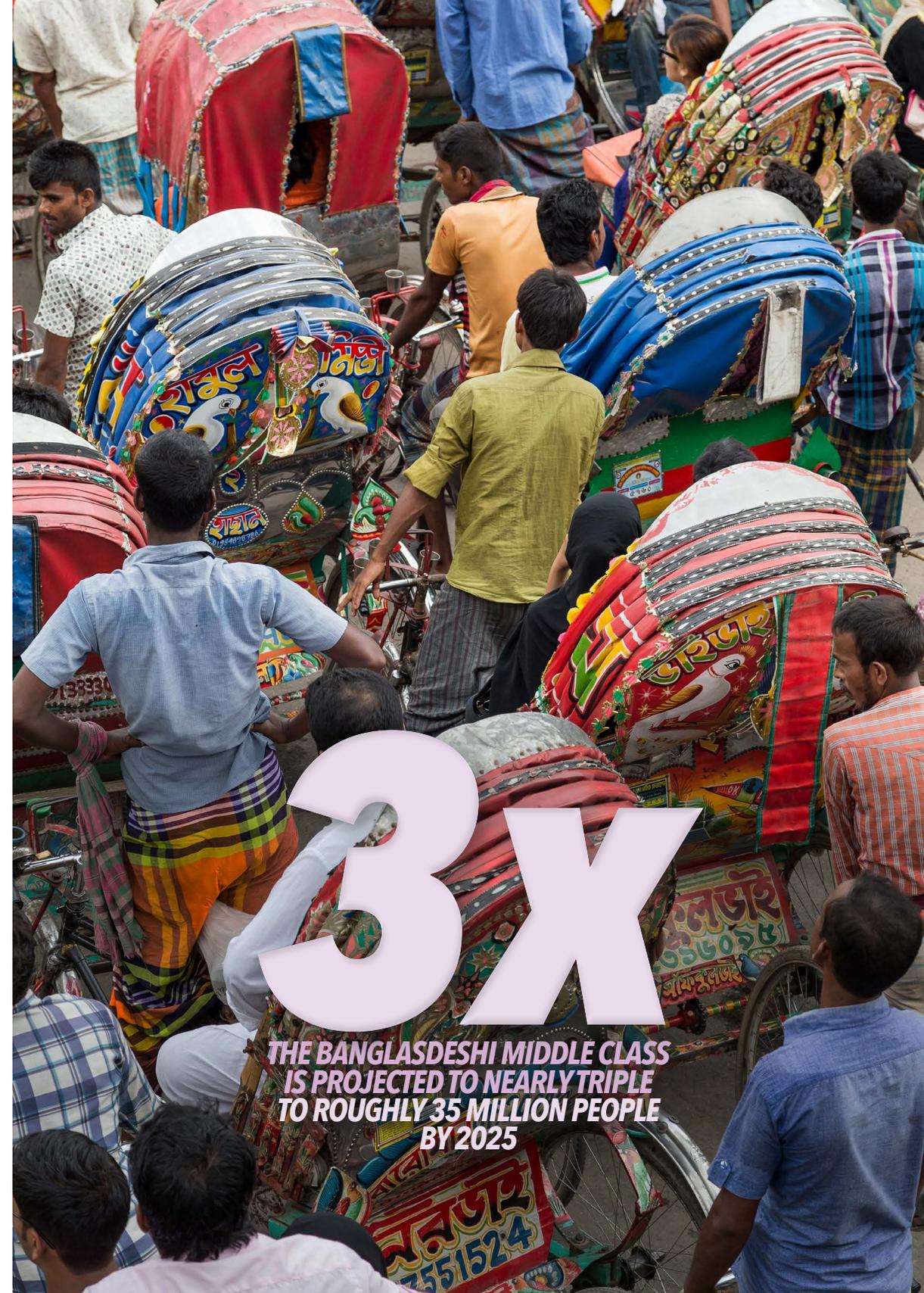
In the infographic (pages 52-53) we can see clear features emerging, such as the inexorable rise in the populations of globally mobile students from China and India for example to the point in 2017 (the latest year where comprehensive data are available) where these two populations represent around 25% of all globally mobile tertiary (postsecondary) level students. If we were to include secondary level, these populations would represent well over a third of all globally mobile students.

Clearly, demographics are a central driver. Absolute numbers of prospective international students in the appropriate secondary age cohort are an easy indicator to track, but within this, how can we best identify those countries where students in the age cohort are likely to be globally mobile for postsecondary/tertiary education programmes?

Key drivers are economic growth, and specifically a rise in middle class populations who are more likely to afford international education experiences, either within the region, or further afield.

We can see in the infographic the impact of the economic success of countries like Kazakhstan (through increases in the oil price, predominantly). ICEF Monitor noted that “the number of Kazakhstani students studying abroad has more than doubled between 2006 and 2017”². Nigeria and Russia are also countries where global student mobility indicators align with the world oil price, among other factors, and similarly are subject to fluctuations and volatility as a result. Likewise, Brazil appears to be recovering its BRIC form since a downturn from the global economic crisis in 2008/9 through to limited signs of recovery in 2016/17. (In April 2019 ICEF Monitor reported “a 20.5% increase in Brazilian outbound in 2018, with a record 365,000 students studying abroad during the year. This marks the third consecutive year of double-digit growth. Canada remains the most popular destination, with the US, UK, Ireland, and Australia rounding out the top five”³. Bangladesh’s 7.3% GDP growth in 2017, compared to a negative picture in 1980 makes it one of the key markets to watch, and illustrates the essential connection for global student mobility of the connection between available populations and the economic

Whether upwardly mobile, or simply getting from A to B, millions in Bangladesh are on the move. CREDIT: iStock



3X

**THE BANGLADESHI MIDDLE CLASS
IS PROJECTED TO NEARLY TRIPLE
TO ROUGHLY 35 MILLION PEOPLE
BY 2025**

The age spread of a country's population is an important distinguishing factor for tracking likely large pockets of global student mobility.

landscape. ICEF Monitor: "Bangladesh continues to demonstrate its potential as one of the most important emerging markets for study abroad in South Asia. It is the eighth most-populous country in the world, with nearly half of its 160 million citizens under the age of 24 and just over a third of Bangladeshis under the age of 15. In another strong indicator of demand for study abroad, the economy, and the country's middle class, are both expanding rapidly. Over the last decade, GDP growth has clipped along at an average of 6.5% per year, and the middle class is projected to nearly triple – to roughly 35 million people – by 2025"⁵.

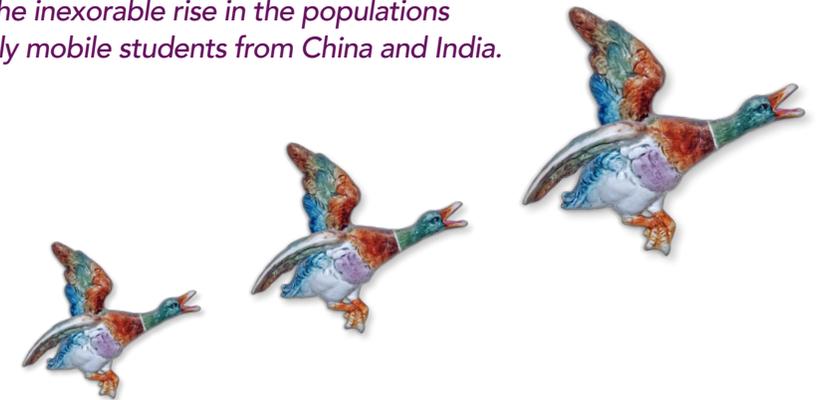
We will look in closer detail at emerging markets and strategies for education providers to address them, in Parts 2 and 3 of No Going Back.

The age spread of a country's population is an important distinguishing factor for tracking likely large pockets of global student mobility. We can see in the infographic that the overall aging of South Korea's population sees the countries' decline from second place at the beginning of the scan in 1998, to fourth place by 2017, with relatively slower growth rates than many of the developing economies. Conversely, Indonesia is an example of a country with strong potential for global student mobility, given that it is the world's fourth most populous country, with 50% of Indonesians under the age of 30. With such a young population, and with regional economic growth, there was a concomitant increase in the number of Indonesian students studying internationally, though given the smaller size of the middle class in Indonesia (coupled with a less well established English language presence), it has been a feature that more Indonesian students are studying within the ASEAN region than in the traditional, Western destinations. While not featuring in the top 20 countries for global student mobility, many in the international education field are

looking for growth from the Philippines, which like Vietnam and a number of African countries all feature predominantly young populations. Indonesia, Nepal and Vietnam are all examples of countries where the unmet demand for quality higher education has driven regional and global mobility. In the case of Vietnam and Indonesia, international providers have seen opportunities to establish TNE (transnational education) programming to meet demand at a more affordable price point.

In Part 3 of No Going Back we will attempt to explore the potential impact on the future size and shape of global student mobility of the TNE market; the rise of regional hubs, and the issues of market addressability in the emerging marketplace of international education.

In the infographic on the following page, we can see clear features emerging, such as the inexorable rise in the populations of globally mobile students from China and India.



ABROAD IN SEARCH OF KNOWLEDGE

THE EXPLOSION IN GLOBAL STUDENT MOBILITY

SOURCE: *Institute for Statistics (UIS)*



RIGHT CLICK VIDEO TO VIEW FULL SIZE
(opens in a new tab/window)



CHAPTER 4

GO SOUTH! THE NEW DYNAMISM OF LATIN AMERICA

Graham Wise examines the shifting dynamics of international education with a particular emphasis on South America, including a focus on Ecuador through an interview with Dr Guillaume Long.

Ecuadoran students on campus at Central University, Quito
CREDIT: Robert Fried / Alamy Stock Photo

*It is not the strongest of the species that survives,
nor the most intelligent that survives.
It is the one that is the most adaptable to change,
that lives within the means available and works
co-operatively against common threats.*

– Charles Darwin



WHEN VIEWED FROM THE PERSPECTIVE of individual students seeking learning experiences overseas, international education is a positive expression of personal freedom and an opportunity for professional advancement. The benefits to students of international education are compound, and have been sweepingly described as changing students' lives and shaping global careers¹. More specifically, international education has been reported to benefit academic attainment, language use, intercultural and personal development, career choice and professional status or income^{2,3}. From the perspective of enrolling higher education institutions, high fee-paying international students contribute greatly to institutional financial wellbeing in an ever-tightening fiscal environment. Institutions from only four countries enroll over half of all international students, those being the USA, UK, Australia and Canada⁴. The enormous success of these countries in driving the growth of international education has fundamentally shifted the way universities are financed and operated. Considering the strong positive reinforcement between national economic benefits and personal advancement, there is little wonder that international trade in higher education has exploded, increasing five-fold between 1975 and 2015⁵.

With such a positive assessment of international education drivers, one might be tempted to predict a sunny future for the continued economic growth of the trade in higher education. Reflecting this optimism, the UK (which is already the second largest recipient of international students in the world) anticipates a 37% growth in international student numbers over the next decade. Such optimism would rate international education in the UK at £35 billion per year⁶. However, there are many countervailing challenges for international education that have been discussed broadly in scientific literature. In this chapter, we frame these challenges within economic, social and reputational dimensions and we discuss them in context with the rise of higher education in emerging economies, particularly Latin America.

This chapter draws insight from an interview with Dr Guillaume Long, who is currently an Associate Research Fellow at the French Institute for International and Strategic Affairs (IRIS). He has also served as the Ecuadorian Ambassador to the United Nations. Of greatest relevance to international education, Dr Long previously served as a Senior Minister in the Ecuadorian Government. During his term in office, Dr Long led the development of four new emblematic



5x

**INTERNATIONAL TRADE IN HIGHER
EDUCATION HAS EXPLODED,
INCREASING FIVE-FOLD
BETWEEN 1975 AND 2015**

universities as a pivotal strategy for the creation of Ecuador's higher education system, which began with national constitutional changes for higher education in 2012 and continues today.

The rise of higher education in emerging economies

Expressed in universal terms, higher education system development in emerging economies can be conceptualised as occurring across three iterative phases. The first phase concerns growth, increased access or democratization of higher education capacity in response to increased market demand; the second phase introduces regulatory controls to support systemic quality improvements; and finally, reputational improvements follow as a corollary of the first two developmental phases. There is no doubt that higher education in emerging economies has been undergoing transformative systemic change, witnessed through unprecedented growth, rapid quality improvement and most recently, reputational increases. So strong has the market demand for higher education been, that it has historically been referred to as a higher education crisis for emerging economies⁷. Since that time, the United Nations Educational, Scientific and Cultural Organization (UNESCO) Institute for Statistics has documented accelerating higher education enrollments in low and middle income countries, across all geographical regions⁸. While market demand for higher education globally is driven by many economic and social reasons, in emerging economies higher education demand is driven by nothing less than the human need to overcome poverty and social inequality, as exemplified by Colombia's Todos por la Educación national citizen's movement⁹.

Perhaps most extraordinary, is the growth of higher education in China where it is reported that 131 degree-providing higher education institutes were created from 2010-2017. That represents 11.8% growth in institutional capacity servicing 3,841,839 graduates in 2017, up 48.3% on the 2,590,535 graduates in 2010¹⁰. While the scale of growth in Latin America is smaller than China's, systemic changes to improve quality in higher education are no less impressive, with national systems for evaluation and regulation of quality being established in Ecuador, Peru^{11,12},

The learning journey begins: dancers perform in the Entrada Universitaria Festival, La Paz, Bolivia. CREDIT: robertharding / Alamy

There is no doubt that higher education in emerging economies has been undergoing transformative systemic change.

Colombia, Uruguay, Argentina¹³, Chile, Bolivia and Brazil¹⁴. Across Latin American countries, while strategies for expansion of higher education capacity differ markedly, exceptional activity has been undertaken to democratize higher education, absorbing massive increases in demand for quality higher education.

Considered from the perspective of reputation, 44 universities in low and middle income countries are listed among the world's top 500 universities in 2019¹⁵. Three of those universities are listed as world top 100 (Tsinghua University – 22nd; Peking – 31st; and University of Science and Technology of China – 93rd). Four universities from Latin America are listed, those being the University of São Paulo (Brazil) ranked at 251 – 300; and the University of Campinas (Brazil), University of Desarrollo (Chile) and Diego Portales University (Chile), each ranked in the 401-500 band. Considering only universities from emerging economies, 70 of the 442 universities listed in the Times Higher Education Emerging Economies University Rankings 2019 are Latin American¹⁵.

The USA, UK, Australia and Canada still remain dominant in the trade in higher education. However, it is clear that the development of higher education capacity, quality and reputation in emerging economies has reached a stage where they may soon start to disrupt the status quo of international education.

Emerging economies disrupting the status quo

Reputational factors are of paramount importance when prospective students select host universities for their international education¹⁶⁻¹⁸. However, compounding the threat of reputational improvements in higher education in emerging economies, are a wide range of social and economic factors that may also help drive a future readjustment in international education in favor of the Global South. Trade in higher education carries many risks for

emerging economies, the most obvious being the loss of talented citizens overseas⁵. Brain drain is one risk that is prompting the implementation of policies in Latin America that prioritize the use of domestic higher education first. For example, the Ecuadorian Government is now supporting the establishment and the student uptake of domestic graduate Masters programs, contrasting with its previous generous support for international scholarships. Although Ecuador is a minor source of students for international education, any indication that emerging economies may be revising policies regarding the provision of international scholarships, should be an early warning to international education actors.

Cost of living, cost effectiveness and availability of scholarships for international education also have a critical impact on students' motivations to study overseas¹⁸⁻²¹. Countries like Norway have demonstrated that offers of free international education have underpinned strong growth in student numbers²². Other countries like Malaysia are aggressively marketing their lower cost of living to attract international students, in Malaysia's case, with aspirations of becoming an Asian regional education hub²¹.

Confounding both the economic and intellectual capital factors described above, is the emerging influence of a more populist global political environment. In the Global North, increasingly populist political rhetoric is driving national security and immigration, and study visa policies that can have impact on student motivations to study overseas²³. For example, the 2017 travel ban in the USA for some Muslim-majority countries caused a drop in international student applications, particularly from the Middle East. Likewise, the uncertainty surrounding the nationalist-inspired UK Brexit phenomenon is likely to impede growth in international education, due to the importance of clarity regarding visa procedures for prospective international students²⁴.

Any indication that emerging economies may be revising policies regarding the provision of international scholarships, should be an early warning to international education actors.

In Latin America and Asia alike, emerging economies have heard this message of soft power loud and clear.

In Latin America also, *orgullo nacional* potentially threatens to stem the Northern flow of benefit due to international education. Policies that promote the use of domestic higher education are not only a consequence of economic rationalism, they are a recognition of the loss of national esteem and influence that is attributable to international education. In 1906 President Theodore Roosevelt was told that “the nation which succeeds in educating the young Chinese of the present generation will be the nation that for a given expenditure of effort will reap the largest possible returns in moral, intellectual and commercial influence”²⁵. In 2018, the CEO of Universities Australia echoed this soft power view, commenting that overseas students would “become tomorrow’s global leaders, returning home as informal ambassadors for Australia and extending our nation’s worldwide networks in business, diplomacy and politics”²⁶. More transparently still, in March 2019, the UK Secretaries of State for Education and for International Trade highlighted the benefit of international education for “broadening the UK’s soft power”⁶. In Latin America and Asia alike, emerging economies have heard this message of soft power loud and clear. China, India and Malaysia are all developing national strategies to attract international students and export their own educational programs¹⁹, and China is already seeing massive growth in inbound international student enrolments, with the Ministry of Education of the PRC reporting a 75% increase in enrolments from 2012-2017.

The threat to emerging economies from international education has been somewhat unidimensionally described as an expression of Euro-supremacy and a neo-colonial process of economic subordination and epistemic erasure²⁷. With such strong sentiment flowing against continued North-South power imbalances, it is important to ask how growth in international education can be sustained, and what models for management of international education can yield benefit sustainably and equitably.

DRAWING ON THE THEMES that are introduced in this chapter, the following interview questions Dr Guillaume Long on the status of higher education in Latin America and future global challenges for international education.

Graham Wise: How would you describe the state of higher education in Latin America and Ecuador?

Dr Guillaume Long: Latin American higher education suffers from a few structural problems that are inherently linked with Latin America’s relative level of development, and a detailed structural reflection is needed on the Latin American economy, its type of society, and the role of higher education. Historically speaking Latin America has been specialized in the production and export of raw materials from extractive industries or agriculture, and this does not really require a sophisticated higher education system. But with the diversification of an economy you have diversification of society, and diversification of the needs for education. That highlights the importance and also the need for quality education. Certainly, one of the major aspects of social, political, economic, and I would even say democratic transformation of Latin America has to do with education. So, the more you have educated citizenry; the more you can diversify your economy; the stronger your institutions become; the more democratic society will be; you’ll reduce structural inequalities and asymmetries between educated and uneducated people; and have a much broader middle of educated people. A good university system is a system that balances very carefully both quality and access: in other words, democratisation and proficiency. It’s a challenge, because it’s easier to cater for elites. But good education is when there is a big difference between input and output, when a student coming in is not the same as the student going out.

GW: What was the Ecuadorian Government’s rationale in developing its post-2012 higher education system?

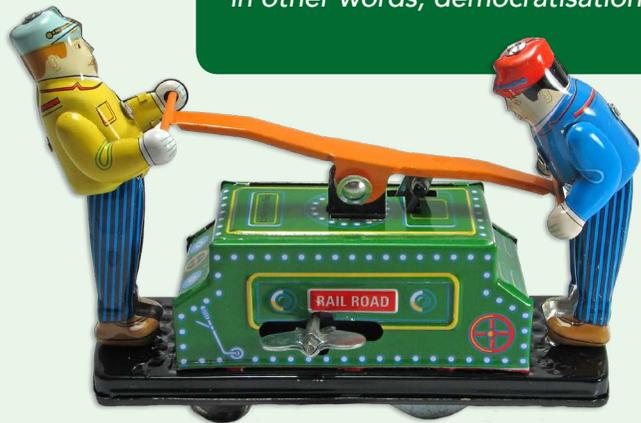
GL: The aim was to diversify the economy and reduce commodity price dependency that is inherent in a primary economy. President Rafael Correa believed that higher education was important for that transformation. Leadership played an important role, Correa’s brand of leftist politics within the so-called Latin American Pink

Tide represented a more academic and technical or technocratic version of leftist politics. Correa was educated in Europe and had a PhD in Economics from the United States, and this played a role in the importance he gave to higher education reform as one of the major goals of his Government. Also, a lot of the people who surrounded him were academics and foreign educated, so they had first-hand experience of academic standards outside of Latin America and they had different expectations as to what a university system should be. Also, in Latin America the deregulation of the 1980s and 1990s meant that the number of universities had bloomed, having a detrimental effect on the quality of higher education. The rationale for the Ecuadorian Government's higher education reforms was a real democratization of higher education that had to be delivered with quality.

GW: What was the Ecuadorian Government's rationale for developing four new international emblematic universities?

GL: The quality message was symbolically and politically very important, to bring back basic standards in higher education. Over ten years, 17 universities were closed down due to lack of quality. So, we really wanted to send a signal with the closure of the universities that higher education was a common good

A good university system is a system that balances very carefully both quality and access: in other words, democratisation and proficiency.



and that there was a right of society to receive quality graduates and professionals. The four new universities had to be excellent. We could not once again create universities based on political criteria, or to satisfy regional vested interests. They had to be created in areas that were crucial and structural, and played a fundamental role in Ecuador's future development, and they had to be internationalised. We wanted to break the pre-existing self-referential logic of Ecuador's previous higher education institutions. Geographic distribution was the least important rationale. The most important rationale was quality and the core mission of the universities regarding the higher education needs of Ecuador, and Ecuador's development model.

GW: What have been the positive impacts of Ecuador's past national strategy to support international education through scholarship programs?

GL: The sending of students abroad was based on the diagnosis that we had weak universities. Secondly, we thought that it would be a great human experience for students to go out of the country to live another reality, to be culturally embedded somewhere completely different, and then to come back and be required to work for double the time of the overseas study grant. As far as I know the return rate was about 97%, so that was great. When we arrived in government, 0.3% of university teachers in Ecuador had PhDs. When we left it was about 15%, which was similar to the Latin American average. Ikiam University now has 70% of lecturers with PhDs. One way of creating this change was to send a generation of people abroad, to come back with Masters and Doctorates that would make this generation much more competitive inside Ecuador's higher education system. Approximately 11,000 students were sent overseas, this was a quarter of the total number of lecturers in universities. With this critical mass we could transform the higher education system. However, other developing countries often fund scholarships without making sure that people come back to the country, allowing Western countries to play the brain drain card heavily. Secondly, not all countries have in mind the transformation of their university systems. It is necessary to train people for the economy of tomorrow, to transform the university and productive sectors in order to transform the country.

For developing countries there is an issue about whose interests are being served, and what kind of politics they're playing ... if you are going to train economists in Chicago for instance, you're going to get a different result than if you train economists elsewhere.

GW: What are the potential negative impacts of international education on Ecuador (and Latin America)?

GL: Universities are making a lot of money through internationalization, not always with quality education. There is also a growing perverse relationship between some universities and companies so that sometimes higher education is not always as independent as it used to be. So, there are a number of things that we could discuss in terms of the risks of internationalization education at large, and how that may affect the interests of small countries like Ecuador. For developing countries there is an issue about whose interests are being served, and what kind of politics they're playing. For example, if you are going to train economists in Chicago for instance, you're going to get a different result than if you train economists elsewhere. But I would say that the above argument represented only 10% of the domestic opposition to Ecuador's overseas study scholarship program. If we had that kind of debate, I would have been somewhat critical myself. I would have said that what we are doing is not perfect, but it is better than not doing it.

In reality, most people who opposed the Ecuadorian overseas study scholarship program were defending mediocre interests at home or were being self-referential. Because we had a university system that was run by people who had not been academics. So, when suddenly we had a methodological approach that disrupted their feudal spaces of power, they had to resist because it would have taken away their legitimacy. The way they resisted it was by brandishing these kinds of arguments of Euro-supremacy. These arguments would have been more genuine if we had a serious

discussion about what we were trying to achieve; what kind of graduates we were producing; were we monitoring the program enough; or was monitoring a problem in terms of free agency. That kind of debate is a rich and legitimate debate. But that was not the debate, it was about protecting the interests of non-academic people running universities.

GW: How do you think the 'soft power' intent of international education might influence future government policy development in developing countries – in particular Latin America?

GL: That soft power intent gives credence to the arguments of the people who were critical of Ecuador's overseas study scholarship program – people who were suspicious of the intentions of host countries. But generally speaking, we know that these are tools of soft power, we were aware of that. But because of the benefits that international education could bring to us, we were still prepared to play 'victim to their soft power'. We could deal with that.

GW: How do you think the increasing quality and reputation of higher education in Latin America might influence market demand for international education?

GL: Yes, that's the ultimate goal. Maybe one day Latin Americans can play soft power with their universities, and have the same advantage, but it will take a while. You have some universities in Latin America that have attracted a lot of Latin American students from neighbouring countries: Universidade de São Paulo in Brazil; UNAM in Mexico; Universidad of Buenos Aires in Argentina; Colombia has some good universities, but there is still some way to go. It is dependent on resources. Ideally, we would like to have a reversal of international education. This is actually what we did when we decided to bring foreign academics to Ecuador. That brought about 7,000 Spanish scholars into Ecuador's higher education system, so we played the brain drain card the other way around.

The world is at a crossroads between greater fragmentation and greater integration.



GW: What strategies might countries like the US, UK, Australia and Canada use, to protect their international student market share or provide more bilateral benefit?

GL: The world is at a crossroads between greater fragmentation and greater integration. I am critical of the kind of globalization that we've had up until now. I think it is responsible for the fragmentation that we are living through. It has been a globalization of winners and losers, and so we are getting a lot of resistance to that globalization which causes conflict, fragmentation and isolation. But given a choice I would want globalization, and internationalization of universities.

I wish we could have more international education in the Global South and Latin America, but this is going to be an ongoing process. So, I'm in favour of those universities keeping their 'share'. I think that the way they can make sure that international education is sustainable, that they are still in the game, and that it is beneficial for everyone, is to think of the development priorities of the countries that they are receiving students from. Not just milking students for money because they need income, but engaging more with the development necessities of the different countries: Understanding what kind of courses and professionals they need, and finding more innovative ways of engaging through exchanges and dual-university programs.

There are all sorts of ways to help developing countries move away from primary economies, which is something that I have strong feelings about. They can also think in terms of different kinds of fees for different international students. Currently it doesn't matter if you are the son of a US billionaire or the son of a subsistence farmer in Botswana – you pay full fees.

GW: Do you have any comments about the importance of physical proximity to market?

GL: In our experience physical proximity to market wasn't a major issue. Because the difference is a plane ticket, and in today's world the flight is not comparable to the living costs for students. Generally speaking, the real difference is in the living costs.

University of Mexico, UNAM, Mexico City

CREDIT: David R. Frazier Photolibrary, Inc. / Alamy Stock Photo



University is not just a place of disciplinary learning but a place of exchange, where students meet all sorts of people, being able to go to arts school, speak to engineers and fall in love with a sociologist.

GW: Could emerging economies like China and Brazil gain advantage through cultural and political proximity to market?

GL: Yes, I think they could. But students are more interested in university prestige. Some prestige is too expensive, so students will establish a pyramid of preference based on prestige and cost. You have prestigious universities in Latin American countries that are not as expensive as living in London or Tokyo – then that would be an advantage. There are a number of criteria: prestige, cost of living and cost of tuition (more than proximity), followed by disciplinary preferences.

GW: Do you have any comments about the value of institutional distinctiveness (rather than global ranking), as attractors for international education?

GL: Prestige is a social construction, it's not objective, it is a product of all sorts of social factors: being created in the 13th Century has prestige: graduating famous people; there are all sorts of associated factors. My first point is that there's a debate to be had, whether prestige is directly linked to quality. My second point is that rankings suffer from a number of flaws making them a poor proxy for quality.

I still believe that there should be an important role played by the university as a place of universal knowledge. I've studied in specialist institutions, but I like the existence of comprehensive universities. University is not just a place of disciplinary learning but a place of exchange, where students meet all sorts of people, being able to go to arts school, speak to engineers and fall in love with a sociologist. There is something universal that is important to the thriving of humanity as an inquisitive species.

DR GUILLAUME LONG is an Associate Research Fellow at IRIS and a French, British and Ecuadorian academic with experience in government and politics. He was Foreign Minister of Ecuador, Minister of Culture and Heritage, Minister of Knowledge and Human Talent, President of the Board for Accreditation and Quality Assurance in Higher Education, Chancellor of Ecuador's school of government and public administration, and advisor to the Minister of Planning and Development, at different times during the ten-year presidency of Rafael Correa.

During his term in office, Dr Long led the development of four new emblematic universities in Ecuador as a pivotal strategy for the creation of Ecuador's higher education system, which began with national constitutional changes for higher education in 2012 and continues today. Dr Long was later Ecuador's Ambassador, Permanent Representative to the United Nations in Geneva.

Guillaume Long holds a PhD in International Politics from the University of London and currently teaches International Relations and comparative politics in France and internationally. His research focuses on foreign policy decision-making processes; Latin American politics, regionalism and security; and contemporary multilateralism.



*Student intelligence meets artificial intelligence:
the future is now. CREDIT: Anton Gvozdikov / Alamy Stock Photo*

CHAPTER 5
**PLAYING
HIDE-AND-SEEK
WITH THE FUTURE**

In looking to the years ahead, we sought diverse views on the major changes likely to benefit or challenge the future world of international education.

*The future belongs to those who believe
in the beauty of their dreams.*

– Eleanor Roosevelt



WE EACH APPROACH THE FUTURE from a different, unique perspective; each of us informed by our personal experience and insight, liberated or limited by the context of our work, and fuelled or thwarted by the visions, ambitions and cultures of the institutions we serve. Given some of the unforeseen changes of the past few years, it would be foolish to imagine that any of us could predict the future with a high degree of certainty, yet more foolish however to not listen to different voices and opinions to inform the decisions we need to take to guide our institutions and serve the needs of students in the years to come.

A key question we asked a number of interviewees was what they see as the major potential changes in the international education landscape.

Winnie Eley, Vice-President (International) at the UK's University of Southampton highlighted an area that relates directly to an issue raised by Ailsa Lamont in the first chapter of this book:

"The one change that could drive positive transformation in the global education landscape in the next five years is high-level global collaboration to addressing equity across jurisdictions through delivering quality education at scale for displaced refugees and the under-privileged."

When we remind ourselves that there are estimated to be 68.5million forcibly displaced people on earth, that is an immense unmet need in terms of people and human potential most of whom are currently unable to access higher level education, if indeed any education at all. This would seem all the more important given the world's increasing need for creative problem solving and the increasingly compelling evidence that refugees bring an immense spirit of resilience and, often, entrepreneurship to the communities that receive them.

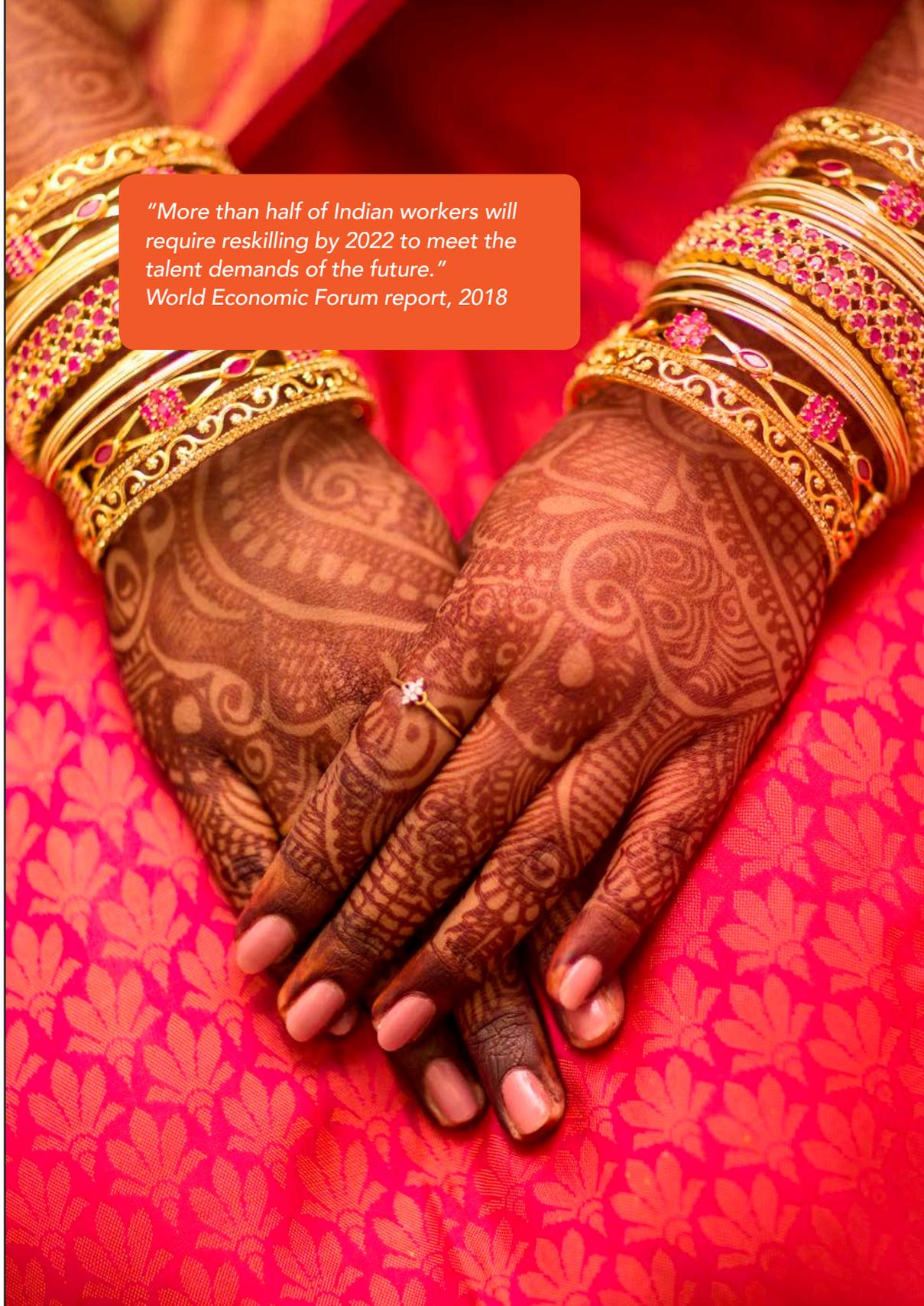
Although the causes of mass population displacements are varied – from persecution, to natural disaster, to climate change – there is no doubt that the phenomenon is one of many indicators of our increasingly interconnected world. This global context for challenges and opportunities was a theme picked up by Charles Bankart, Associate Vice Provost at the University of Kansas:

"While internationalization strategies and the role of higher education in that process is contested at the moment, what is not debatable is the globalized context in which

we all live, learn and work. Internationalization is a response to and a strategy for coping with the challenges associated with a rapidly globalizing world, and that world will continue to globalize whether or not we choose to internationalize our institutions and approaches to education. In this context, I think the most positive change is the level to which educational systems around the world are recognizing this and developing innovative strategies for preparing the next generation of leaders for success in a globalized environment. As a result, we will have greater awareness of the challenges we face, as well as increasingly sophisticated approaches to model from.”

Global patterns of change will, of course, be influenced by the increasing ambition of regional initiatives such as the Institutions of Eminence Initiative in India which was highlighted by Eddie West, Assistant Dean, UC Berkeley Extension, and Executive Director, International Programs at the University of California, Berkeley:

“I’m hopeful that changes underway in Indian higher education might have an outsize and, on balance, positive impact on our field. The Institutions of Eminence initiative is a sign that the government is beginning to take seriously the need for significant quality improvements among Indian universities and institutes. That along with the growing impact of a number of young, private universities may produce lasting change in the caliber of higher education in India along with the number of Indian students who can partake of it. Meanwhile, in terms of India’s impact on international student mobility, it’s of course a major sending country – the top country of origin of international students in Canada, and the second leading sender of students to the U.S. But like China it also aspires to become and remain a destination in its own right. The relatively new Study in India initiative is an impressive step in that direction. The fact that India is looking to parts of the world like Africa, the Middle East, and elsewhere in South Asia, and is pledging to offer fee waivers to a large number of international students, commands respect. I can’t help but feel that India becoming more of a major player in global education would be a healthy development, what with it being the world’s largest democracy, and given its rich history and traditions.”



“More than half of Indian workers will require reskilling by 2022 to meet the talent demands of the future.”
World Economic Forum report, 2018

Drilling down further from the regional to the national level, the volatility of the political climate in individual nations has the potential to send shockwaves across entire regions. Perhaps nowhere is this more apparent than in the ongoing repercussions of the closely contested vote of the United Kingdom to withdraw from its decades-long membership of the European Union. Although the vote took place back on June 23 2016, there remains a lack of clarity about precisely how the separation will take place. That is just one of the issues that was front of mind for Joachim Ekström, Head of Student Recruitment at Uppsala University, Sweden:

“Short term right now, Brexit is the big one. A little more long term is technological progress... MOOCs were just the beginning, but there will be a day when an online degree is seen as just as good, or even better, than an on-campus degree. Universities need to prepare for that day now and it will affect everything from delivery modes, teachers, curriculum, pricing, etc. All parts of marketing will be affected”.

While some influences on the future, such as an election or referendum result, can be sudden and seismic, others may be slow onset changes scarcely discernible in their early manifestation but equally impactful in the longer term. One such change is the increasing development of the middle classes globally, and the impact this will have in terms of the need and demand for higher education, as explained by Rob Coelen, Professor of Internationalisation at Stenden University in The Netherlands:

“The continued increase in the growth of the global middle classes will see more students looking for opportunities to study abroad. Indeed, the changes in the global labour market with respect to the nature of jobs further fuels the desire to qualify at the tertiary education level since employment is changing from manufacturing jobs to roles requiring social and creative intelligence. There will be many more countries that are unable to supply the resources at the tertiary education level to meet public demand, whilst other countries are able to absorb additional students due to population shrinkage in regions. Moreover, the increases in building knowledge-based economies has seen a steady increase in incentives, such as increased time to find a job

Despite the emergence of so-called populist politics, and the potential isolationism that can follow, there was still a palpable sense of optimism among those we interviewed.

after graduation, for students to become internationally mobile. These effects, whilst modest presently, will increase in the medium term.”

Despite the emergence of so-called populist politics, and the potential isolationism that can follow, there was still a palpable sense of optimism among those we interviewed coupled with a purposeful commitment to maintaining an ethos that sees value in the international movement of students, as articulated by Lindsay Addington, EdD, Director of Global Engagement at the National Association for College Admission Counseling in the U.S.:

“It is refreshing to see more articulated commitments affirming the value of international students to a nation. Recognizing the contributions diverse students bring, some countries are investing in national-level strategies and dedicating resources to their recruitment, support, and success. In others – where nationalism is shaping harmful rhetoric and federal policies – it is promising to see the educational institutions banding together to send messages of welcome to international students and shaping favorable institutional policies that are in their control.”

BIOGRAPHIES



PAMELA BARRETT

Pamela is an education consultant, currently CEO and Director of Barton Carlyle. Pamela delivers consulting projects and training activity for clients globally using her 30-year experience in the field in North America, the UK and South East Asia.

An Associate with KPMG, one of the global “Big Four” audit and advisory firms; Pamela is an international education expert providing insight for KPMG clients. Previously Education Attaché in the USA; with the British Council’s Education Service in Malaysia; and in key positions at institutions in the USA and UK, Pamela has first-hand experience in important markets. An expert in the international student experience, strategy, market research, scholarship programmes, alumni and risk management, Pamela has a global client base. A member of NAFSA, EAIE, NAGAP, AIEA and CBIE, Pamela has published articles and led webinars on international student recruitment, enrollment management, strategic risk management and the international student experience, and is a sought-after presenter at international education events worldwide.



AILSA LAMONT

Ailsa Lamont has more than 25 years of experience in international education, economic development, and social innovation spanning 60 countries.

For most of this century she has held senior roles at Australian universities; most recently as Pro Vice-Chancellor International and Social Innovation at CQUniversity where she successfully led the bid to become the first Australian university recognised by Ashoka U as a ‘changemaker campus’, a leader in social innovation education.

She has also been executive director at RMIT University in Melbourne where she was responsible for the operation of Australia’s largest international student program, and director at James Cook University in Queensland where she established the full degree recruitment operation and student mobility program. A specialist in strategy development and implementation across all aspects of international student operations, she has built a reputation as someone who delivers sustainable results focused on meeting students’ needs.

An active participant in the sector, Ailsa established the Queensland Universities International Directors Forum and was an active member of its national equivalent, the AUIDF, as well as a member of the academic organising committee of the QS Maple Conference in the Middle East.

Trained as an interpreter and translator in Russian and German, Ailsa brings personal insights to her work through her experience as an international student in Germany and the USSR. In 2010, Ailsa was the recipient of an Endeavour Executive Award to Papua New Guinea where she conducted research on the role of education providers in capacity-building in their communities.



ANN MASON

Ann Mason has over 20 years' experience in international education, higher education administration and US-Latin America academic cooperation. She directs her own consulting firm, Mason Education Group, based in Bogotá, Colombia. Her previous positions include Executive Director of the US-Colombia Fulbright Commission, and Professor and Chair of the Political Science Department at the University of the Andes, both in Bogotá.

Ann advises universities, government entities and non-profits on all aspects of global higher education engagement, with particular expertise in strategy development, organizational assessment, strategic partnership development, and the design, delivery and evaluation of international education programs. Ann's client list includes the US Embassy in Bogotá, IIE, the World Bank, the Land Grant University Colombia Consortium, and universities and government entities in Latin America.

She serves on the boards of directors of the University of Rosario and the US-Colombia Binational Center, is a member of the Accreditation Standards Steering Committee of NASPAA, and was chair of NAFSA's Teaching, Learning and Scholarship Knowledge Community and Latin American Forum. Ann received her undergraduate degree from Georgetown University and holds a PhD in political science from Yale University



GRAHAM WISE

Dr Graham Wise is a higher education management expert and a Fellow of the Association for Tertiary Education Management, having experience in Australia, Latin America and the USA. Dr Wise is Vice President of Innovation and a co-founding Board Member of Ikiam University. Ikiam is a new emblematic university of Ecuador, built in the Amazon region for international research and teaching in natural resources management, conservation and sustainable development. Dr Wise serves as the founding President of Colonso, a not-for-profit for conservation, education and innovation in the Amazon. He also serves on the boards of Ikiam EP – a public enterprise for commercialisation; and Elective Affinities Architecture – an Australian start up offering international professional development in design and architecture in Australia. Previously as an Endeavour Executive Award Fellow in the USA and as a Prometeo Fellow in Ecuador, Dr Wise investigated world best practice for international and multi-sectoral engagement.

As a researcher in Ecuador and an Adjunct Clinical Associate Professor at the University of Wisconsin-Milwaukee, Dr Wise publishes in the areas of higher education management and regional development. Having higher education management experience in developed and developing countries, Dr Wise has a keen focus on place-based organizational development, for which universities must integrate international excellence with regional relevance. The global inequities that Dr Wise has experienced in international education have driven his strong belief that in addressing North-South power imbalances in international education, we can drive this sector to deliver benefits to all international education participants who are committed to sustainable growth of international education.

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The result is likely to be a smoother, whole-organization approach to internationalization. Or communications that secure good students earlier. Or processes that are more responsive to students, agents and sponsors. Or leveraging scholarship programmes. The precise benefits will depend on how we define your vision from the start.

MARKET INSIGHT

Markets are never static. But today they are in perpetual flux. Abrupt changes are the norm. Dynamic markets mean risk is inevitable, and mistakes can be hugely expensive. Our networks, experience, and real-world research bring the insights that reveal true market size, shape, drivers, competition, accessibility, cost and trends.

Among a range of expert market research and intelligence services, we offer market feasibility reviews for new market entry, and undertake prospective partner due diligence for maximum reach in the market.

For one client this led to developing interactive asset libraries of market information. For another, we provided training and support in market intelligence for international staff to embed learning and so future proof our work.

RISK MANAGEMENT

We ensure you have a mature assessment of risk and its implications. Managing strategic risk effectively is vital.

We help institutions to define their appetite for risk in internationalization, and to map and measure appropriate risks to fulfil their strategic goals.

Through approaches such as risk mapping and scenario planning, we help you manage and mitigate risk as part of developing your comprehensive international risk management strategy.

REPUTATION AND BRAND

What do people say about you when you're not in the room? It matters profoundly. How your target markets and stakeholder groups see you is central to the success of any strategy.

To get under the skin of these issues we review communications, assess the student experience, examine applicant decision making, carry out agent research, conduct competitive brand mapping and more.

We bring vital insight into student perceptions through applicant decision making, and into the overall student experience, looking at issues such as retention and satisfaction drivers. Via surveys and other data we form meaningful and actionable insights, so that change can be effective, and so that the student experience is improved.

Contact us.

**For strategic clarity, business plans that truly deliver,
and real-world innovation visit**

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BARTON CARLYLE AND ICEF IN PARTNERSHIP: ICEF ACHIEVE

Barton Carlyle is delighted and grateful for our ongoing partnership with ICEF and ICEF Monitor. Barton Carlyle and ICEF work in collaboration to offer best in class advising services to ICEF participants through the ICEF Achieve programme. ICEF Achieve offers the consultancy expertise of Barton Carlyle in internationalization strategy, market research, recruitment operations, and risk management for education providers. The suite of advisory offering supplements the extensive ICEF event operations centred around agent/representation networking, and the market intelligence service ICEF Monitor.

ICEF is a global leader in international education, committed to advancing the industry through the promotion of best practices, strengthening of global networks, and sharing of insights and analysis on the latest industry trends and data. ICEF's global programme of networking events supports student mobility by connecting international education institutions, student recruitment agents, and relevant service providers.

ICEF provides professional development, training, and tailored services in marketing, business development, and other areas to stakeholders in the international education sector around the world.

ICEF Monitor delivers the industry-leading news aggregator service for the international education field, including market intelligence, news, research and commentary. Barton Carlyle is grateful to ICEF Monitor for permission to reference its content in the No Going Back series.

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