A COLLECTION OF RECENT REPORTS
FROM THE
OBSERVATORY ON BORDERLESS HIGHER EDUCATION
One of the things the Observatory is best known for is coverage of the international branch campus (IBC) phenomenon. IBFs have grown in number and variety over the past decade, covering a wide range of host countries and exporting institutions. IBFs embody efforts to address supply/demand mismatches in higher education in different parts of the world, a more entrepreneurial mind-set on the part of universities, and a view that a conventional campus, as opposed to a more modest presence, may be the best means to a high quality student experience. At the end of this article we have provided the Observatory’s definition of an IBC.
The Observatory published its first report on this topic in 2002 with updates in 2006, 2009 and 2012. We will release our latest report in 2015. In preparation for this update, we will comment on subsections of the IBC trend. This article looks at IBFs of Indian higher education institutions. Many foreign institutions are interested in setting up shop in India itself, hampered by the Indian government’s seemingly endless debate about how to regulate such activity, but that is not our topic today. Our concern is Indian colleges and universities setting up IBFs around the world.

Our 2009 report counted ten Indian IBFs, up to 17 in 2012. This was about 9% of all IBFs counted by the Observatory in 2012, and the fourth largest total by home country (after USA, UK and France). Of those 17, ten were in the United Arab Emirates, a major IBC hub and home to a large number of foreign workers from south Asia, and four in Mauritius. The other three were in Malaysia, Nepal and Singapore. Two Indian IBFs were planned – one in Australia and the other in Sri Lanka. In early 2015, what’s changed? Are there now more Indian IBFs? How are the IBFs noted in 2012 faring today?

In recent years, Indian IBFs have been nothing if not controversial. The University Grants Committee (UGC), a buffer organisation between government and institutions, has been concerned about all manner of branches and franchising, both domestic and international. Much activity is said to go on without the necessary UGC approval, and the organisation has gone back and forth between trying to accommodate and shut down unapproved IBFs. Mauritius is a case in point, where the branch campuses or other activities of five Indian institutions, despite being approved by the Mauritius Tertiary Commission (MTC), were said by UGC to lack approval in India. This appears to have led to the closure of one branch campus - Eastern Institute for Integrated Learning in Management (EIILM), although the institution is still listed as approved by the MTC. Non-approval is not a mere technicality; any graduate wanting to work in India might find their degree deemed worthless.

UGC’s scrutiny is in the context of a recent move to ‘mandatory’ accreditation for higher education institutions to receive public funds. This prompted the more formal separation of UGC and the National Assessment and Accreditation Council (NAAC), which carries out accreditation visits. NAAC has yet to visit every university, let alone every college. Many institutions have been used to relatively little oversight, which may explain why some embarked on IBFs without much notice. UGC’s concerns seem to be less about tangible quality assurance problems on the ground at particular IBC sites and more about the strictures of founding statutes or lack of due process; but that too may reflect the organisation’s attempt to set clear boundaries for such a large, unwieldy sector. The Ministry of Human Resource Development, which oversees higher education, recently asked universities to provide all MOUs signed in the past 25 years(!), suggesting the tussle is far from over.
There appears to be no official list of international branch campuses of Indian higher education institutions. But there is also no evidence that the number has increased, perhaps because of regulatory pushback. The table below summarises Indian IBCs known to the Observatory, as of January 2015:

### International Branch Campuses of Indian Higher Education Institutions • January 2015

<table>
<thead>
<tr>
<th>Institutions</th>
<th>Type</th>
<th>Host Country</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sri Guru Granth Sahib World University</td>
<td>UG, PG. Business, Science, Sikhism</td>
<td>Kenya</td>
<td>Planned</td>
</tr>
<tr>
<td>Manipal International University</td>
<td>UG. Business, Engineering, Science</td>
<td>Malaysia</td>
<td>Active (from 2011)</td>
</tr>
<tr>
<td>Melaka Manipal Medical College</td>
<td>UG, PG. Medicine</td>
<td>Malaysia</td>
<td>Active (from 1997)</td>
</tr>
<tr>
<td>Amity Institute of Higher Education</td>
<td>UG, PG. Business, IT</td>
<td>Mauritius</td>
<td>Active (from 2010)</td>
</tr>
<tr>
<td>Dr. D Y Patil Medical College</td>
<td>UG, PG. Medicine</td>
<td>Mauritius</td>
<td>Active (from 2010)</td>
</tr>
<tr>
<td>IIT (Delhi) Research Academy</td>
<td>UG, PG. Engineering, IT</td>
<td>Mauritius</td>
<td>Planned</td>
</tr>
<tr>
<td>Manipal College of Medical Sciences</td>
<td>UG, PG. Medicine</td>
<td>Nepal</td>
<td>Active (from 1994)</td>
</tr>
<tr>
<td>Amity University</td>
<td>UG, PG. Architecture, Business, IT</td>
<td>UAE</td>
<td>Active (from 2011)</td>
</tr>
<tr>
<td>Bharati Vidyapeeth Deemed University</td>
<td>UG, PG. Business, Engineering, IT</td>
<td>UAE</td>
<td>Active (from 2009)</td>
</tr>
<tr>
<td>Birla Institute of Technology and Science</td>
<td>UG, PG. Architecture, Engineering</td>
<td>UAE</td>
<td>Active (from 2000)</td>
</tr>
<tr>
<td>Institute of Management Technology</td>
<td>UG, PG. Business</td>
<td>UAE</td>
<td>Active (from 2006)</td>
</tr>
<tr>
<td>Manipal University Dubai</td>
<td>UG, PG. Architecture, Business, Engineering, IT, Media</td>
<td>UAE</td>
<td>Active (from 2000)</td>
</tr>
</tbody>
</table>

Only nine out of 17 IBCs from India listed in the Observatory’s 2012 report (53%) are still in existence or similarly classified as of January 2015. All are private institutions, with the exception of IIT Delhi, and all non-profit, save Manipal. Programming is typically undergraduate and postgraduate, and confined to a small number of career-oriented fields. Manipal aside, host countries are limited to Mauritius and UAE, suggesting the importance of diaspora communities. Indeed, the planned Sri Guru campus in Kenya will serve the county’s Sikh population. None of the IBCs trumpet enrolment numbers, implying that most have no more than a few hundred students.

The fact that only three new or newly conceived Indian IBCs; Manipal’s non-medical campus in Malaysia, IIT-Delhi in Mauritius and Sri Guru in Kenya, are listed following the Observatory’s 2012 report points to dampened interest following stalled efforts and regulatory objections at home. Prospective IBC initiatives from Vellore Institute of Technology University and the National Law School of India in UAE, and Jaipur National University in Malaysia, mentioned in the media in recent years, appear to have come to nothing. Manipal was noted as one of the institutions interested in opening a campus in Sri Lanka, following the country’s decision to admit foreign universities, but...
the organisation’s website makes no mention of such plans. 
As well as EIILM noted above, seven other Indian IBCs listed in the Observatory’s 2012 report (47% of the total of 17) are omitted from the above table. Here’s why. 
The case of SP Jain School of Management, listed in the Observatory’s 2012 report as an Indian institution with campuses in Singapore and UAE and plans in Australia, is a curious one. The School is now positioned as an Australian institution with campuses in Singapore and UAE, and a ‘sister’ school in India. Today, SP Jain is overseen by the Tertiary Education Quality & Standards Council (TEQSA), Australia’s national quality assurance body, and it has a campus in Sydney. What is going on? 
In fact these are connected but separate institutions. SP Jain India (Institute of Management & Research) was founded in 1981 by the grandfather of the founder of SP Jain Dubai - and now Australia and Singapore - in 2004 (School of Global Management). The Observatory spoke to Trent Pohlmann, Head of SP Jain’s Sydney campus, who confirmed that his institution is in no sense a branch campus of SP Jain India. Indeed, Mr Pohlmann noted that SP Jain Australia is soon to open a branch campus in Mumbai, its first campus in India and in the backyard of SP Jain India. Mr Pohlmann said the two SP Jain’s may cooperate in some areas but compete on others. From an IBC perspective, we now have an institution with a founder from India, a first campus in Dubai, now headquartered in Australia, with a branch campus in Singapore, and now a soon-to-be branch campus in India itself.
JSS Mahavidyapeetha’s campus in Mauritius, the JSS Academy of Technical Education, noted in the Observatory’s 2012 report, appears to be a distinct institution, affiliated with but not a branch campus of its Indian parent. The JSS Education Foundation’s presence in Dubai, also counted as an IBC in the Observatory’s 2012 report, is judged a similarly distinct entity that appears to offer degrees from the UK’s University of Teesside. Madurai Kamaraj University, listed in the Observatory’s 2012 report as having an IBC in the UAE now appears to have no more than a local affiliate for distance learning. Today, Mahatma Gandhi University, another IBC entry in the 2012 report, records only a series of PO Box numbers in various Gulf locations. University of Pune’s IBC in Ras al Khaimah (RAK), United Arab Emirates, closed in 2011 after two years of operation. Leadership blamed RAK’s less central location, compared to Dubai. Pune was the first example of an Indian state university attempting an IBC. 
Prospective IBC initiatives from Vellore Institute of Technology University and the National Law School of India in UAE, and Jaipur National University in Malaysia appear to have come to nothing.
So what can we conclude about the state of Indian IBCs? Some rationalisation of the influx of IBCs into UAE is to be expected, which may mean a healthier future for those remaining. For the UGC in India, IBCs are seen as a distraction from bringing the vast higher education sector into better order; and a sideshow for a government trying to expand domestic capacity. Small foreign ventures, even if targeting Indians abroad, may suggest more risk than benefit. No doubt many Indian universities have been dissuaded from IBC ambitions by the UGC’s tough words and media coverage of unapproved operations.
There is a final strange twist to this tale. Ministry officials recently pointed out that no IBC, approved or otherwise, may offer an Indian degree. This is consistent with the fact that no Indian IBC known to the Observatory emphasises any kind of formal standing in India, instead citing local approvals. Yet it is odd for India on the one hand to try to control IBC activity but on the other make it impossible for any Indian institution to actually export an Indian degree. Rather than as an annoying distraction, the Indian government might be better off viewing IBCs as valuable innovation, building new affinities for far-flung Indian communities and developing precious cross-border expertise. If India actually encouraged IBCs, using a robust but clear regulatory framework, the gains might start to outweigh the risks. Such an approach might also throw a different light on the potential benefits of IBCs in India itself. It will be interesting to see how India regulates the Mumbai campus of SP Jain Australia.

The Observatory’s definition of an International Branch Campus (IBC):

To be counted, a campus must:

- Operate a physical site wholly or substantially under its own name
- Offer degree-level programming and its own degrees
- Offer entire degrees at the campus, not simply parts of degrees or other short-term academic experiences
- Operate as a branch of a foreign higher education institution and not as a wholly domestic institution (e.g. some former branch campuses have morphed over time into domestic operations).
The internationalisation of higher education in France: It’s time to invest

Quentin Delpech, France Stratégie, expert on HE internationalisation
Nicolas Charles, lecturer in sociology at the University of Bordeaux

This is a summary of a recent report entitled ‘Investing in the internationalisation of higher education’ by France Stratégie, an institution advising the French Prime Minister. The situation is clear: a significant investment is required to enhance and diversify the internationalisation of French HEIs. France Stratégie proposes a principle of charging non-EU students for the full cost of study, but such a pricing system must be targeted to meet strategic objectives.

Internationalisation is a reality
The internationalisation of higher education is a fact. For France it is both an opportunity and a challenge. The time has come to take advantage of the profound transformations the HE sector is experiencing at the international level, and to overcome the issues the French HE system is currently facing.

The geography of the global knowledge economy has undergone a number of profound changes over recent decades; notably the monopoly of developed countries on research and innovation has been decreasing, while the participation of countries of the South has been increasing. In 2000, for example, there were no emerging countries among the top five in terms of research and development expenditure; by 2010, China and South Korea had replaced France and the United Kingdom. Driven by globalisation and improved standards of living in emerging countries, the number of international students continues to grow. It is expected to increase from about 4 million today to more than 7.5 million in 2025. HE internationalisation is no longer confined to international student mobility: programmes and higher education institutions (HEIs) cross borders; the information and communication technologies revolution offer new opportunities for using and sharing knowledge beyond borders; and international research collaborations are being promoted as hallmarks of excellence.

If the centre of gravity of the knowledge economy remains in the North, the competitive edge of developed countries is surely temporary. The major destinations for internationally mobile students are losing market share and finding themselves faced with increased competition as a result of strategies designed to promote the specialisation and clustering of the higher educational offering in Asia and the Middle East. Over the past decade, the growth in market share of international students achieved by the BRICS countries has been twice as high as that of the traditional host countries (United States, United Kingdom, France, Germany and Australia). In the meantime, France is in a good position to take advantage of these ongoing changes.

France is a key player
According to UNESCO figures, France was the third most popular host country among international students in 2012, hosting some 271,000 students. France therefore attracts 6.8% of all students enrolled outside their country of citizenship, behind the United States (18.5%) and the United Kingdom (10.7%), and ranks 5th in the world in terms of volume of scientific production through international collaboration, behind the United States, the United Kingdom, Germany, and China. French students are also rather mobile, with over 62,500 French citizens studying abroad, in 2012, with the aim of gaining some form of qualification, not to mention those enrolled in Erasmus exchange programmes, of which there were another 35,000 in 2012. Transnational education (TNE) was taken on
board by French HEIs very early on. A census of French higher education programmes and HEI operated abroad, carried out by the Ministry of Foreign Affairs and the Agence Universitaire de la Francophonie (‘Francophone University Association; AUF) in 2006, recorded 242 programmes in 26 countries, serving some 40,000 students.

**France must make a better use of strong assets**

The sociology of inbound mobility in France offers a long-term outlook. France differs from other major host countries in that it hosts a very large proportion of students of African origin, amounting to 42.8% in 2011. This peculiarity holds huge potential for growth given the development prospects of the African continent, in particular in the field of education. France, of course, has other assets, including one of the most extensive non-tertiary foreign education networks in the world. Nearly 320,000 pupils attend French-speaking schools from primary school through to upper secondary school. More than 50% of them are not French nationals.

**France faces a number of challenges**

In an international sphere in which HEIs are compared and assessed in the framework of international higher education rankings, the gap between France’s assets and its measured performance is a handicap when it comes to global competition. French HEIs are poorly represented in international rankings, with only 20 featuring in the top 500 in the Shanghai ranking. From a human and financial perspective, the resources allocated to internationalisation policies remain modest. The human resources devoted specifically to internationalisation policies are limited, and the individuals concerned are insufficiently trained. Furthermore, student services are both underdeveloped and poorly adapted to the needs of international students. Investment in developing digital offering, in infrastructure capacity, student services offering and in promoting TNE programmes abroad, is also limited by budgetary constraints.

**A need for strategy?**

In order to deal with these issues the French HE system must adopt an ambitious strategic approach. This in turn requires clarification and prioritisation of the objectives higher education internationalisation policies should achieve. France’s strategy regarding HE internationalisation has historically been based around a series of influence and cooperation-based approaches and, more recently, an approach aimed at attracting skilled graduates. Any strategy for France should address three main issues: improving the quality of HE offerings while maintaining fair access, diversifying our internationalisation policies by shifting to a stronger e-learning offer, supporting the TNE initiatives of our HEIs, and finally, ensuring a sustainable funding environment for HEIs.

**An ambition and a financial lever**

France Stratégie proposes a principle of charging non-EU students for the full cost of study, but such a pricing system must be targeted to meet strategic objectives and must serve an ambitious investment plan to enhance the quality of the HE sector. On the one hand, it is important that fees be increased to reflect the full cost of education in a selective manner, that is to say they should be targeted in a way that reflects the priorities identified primarily at the national level. Following the example of the Swedish system, a waiver of all fees for international doctoral students would be introduced with the aim of attracting the most highly skilled.

On the other hand, this pricing principle cannot justify a decrease in the corresponding public expenditure, but rather it must serve the development of an inclusive form of internationalisation that enhances the quality of the French higher education system. This principle should help provide the higher education system with the resources it needs to achieve this quality improvement. The new resources generated by the increase of tuition fees would amount to some 850 million Euros a year and will be entirely reinvested to serve three main objectives:

1) **Maintaining fair access to the French HE system:**

The current scholarship policy for international students needs to be readjusted. In order to neutralise the short-term negative effects of the introduction of a full-cost tuition fees principle on international students’ enrolment, and to promote an ‘inclusive internationalisation,’ 30,000 additional grants should be provided, in the form of tuition fees exemptions. This policy should specifically target the French-speaking world, and Africa in particular. The cost of this effort to readjust scholarship policies would amount to some 440 million Euros a year.

2) **Improving the international student experience:**

Increasing tuition fees will, of course, result in an increase in students’ expectations. Given that student services are relatively underdeveloped in France, it would be necessary to allocate at least 1000 Euros per international student – approximately 10 percent of total full-cost tuition, to implement initiatives relating to the student experience as a whole (French language classes, special services to help students find accommodation or employment, etc). Such a system would cost around 280 million Euros per year.

3) **Reinforcing the attractiveness of the French HE system:**

Investment is required to support the internationalisation of French HEIs and their digital offering, in particular towards French-speaking populations. This investment would be funded through ‘calls for projects’ with funding amounting to some 132.5 million Euros a year, 52.5 million on TNE initiatives and 70 million on the digital offering. Reinforcing our attractiveness also requires increased means of communication and marketing aimed at targeted countries and the introduction of a ‘branding’
approach for the French higher education system (‘brand France’). There should also be an increase in the resources allocated to diplomatic networks responsible for identifying and selecting grant-holders, and in the wider sense promoting the French higher education system abroad. Funding amounting to 7.5 million Euros per year could be allocated to these actions. Investing in the internationalisation of higher education is critical in the context of increased competition and diversification of the HE sector at the global level, but it is also crucial in order to sustainably improve the quality of the French HE system.

Will worldwide political and economic trends affect student mobility patterns?
Marguerite J Dennis, President, MJ Dennis Consulting

Introduction
International higher education is a big business. Estimates vary, but annual global revenue exceeds $500 billion and is projected to substantially increase in the future. Evidence suggests that international student mobility patterns are changing and I maintain that specific political and economic trends will significantly impact where international students enrol in the future. Most colleges and universities rely on enrolling international students to meet financial and diversity strategic goals. However, some schools base their strategic international plans on past enrolments of international students. This article will attempt to make the case that political and economic trends in certain parts of the world will impact the future enrolment of international students and serve as a wake-up call to colleges and universities to question, and perhaps alter current international strategic plans.

Economic and Political Trends
Ian Bremmere, in the January 19th issue of Time magazine, cautions readers to pay close attention to the political and economic difficulties in Europe that will affect all segments of society. The economies of many European countries have long been in a major downturn with high unemployment and financial constraints affecting all segments of society, including higher education funding. This is not a single year event. There are long-term implications for higher education when austerity measures are imposed. In Greece and Spain, more than half of all young people are out of work. The political and economic changes defining China today will shape the number of Chinese students electing to travel abroad and may limit the number of Chinese parents who have the financial means to send their children abroad to study. Political discord throughout the Middle East will negatively impact higher education in the region. An entire generation of young people may be shut out of university opportunities as a result of the conflicts in Syria, Iraq, Jordan, and Turkey. Political unrest in Nigeria, one of the largest exporters of international students, and the outbreak of Ebola in Sierra Leone and Liberia will negatively impact future higher education enrolments in those countries. The declining price of oil will impact treasuries in several countries in the Middle East, Africa and...
South America, with obvious implications for higher education funding. Despite the challenges of the world in 2015, Patrick Grove, in the January 9th issue of Times Higher Education, reports that higher education participation rates will increase and are projected to more than double over the next two decades.

The following international facts support this prediction:

- International higher education is a big business, a more than $500 billion dollar industry estimated to reach $1 trillion dollars in the next few years.
- In 2000, the number of international students was 2.1 million. By 2025, the Organisation for Economic Cooperation and Development projects that international student mobility will reach 8 million students.
- This year, India is estimated to have 9 million potential university students.
- By 2020, China is projected to have 20 million potential university students.

Technological Trends Affecting Student Mobility
There will probably be no greater impact on worldwide higher education than the integration of technology into educational delivery methods. The Internet has rendered geography irrelevant and digital options are changing the way higher education is consumed. The numbers are staggering and change daily but it’s safe to state that there are millions of students worldwide taking online or MOOC courses. The jury is still out on the potential and sustainability of online education. But the major MOOC providers, Udacity, Coursera, edX in the US, FutureLearn in the UK and Iversity in Germany, believe that MOOCs have the potential to educate millions of students, ‘democratise’ higher education and build global communities.

Two South African universities are offering MOOC courses to thousands of African students and the University of Witwatersrand, partnering with edX, has more than 200,000 African enrolments. The University of Cape Town will develop its own MOOC partnership with FutureLearn. Demand for alternative methods of delivering higher education in the future is expected to outstrip demand for traditional methods by 2020.

Current Student Mobility Patterns

CHINA

Worldwide there are more Chinese students studying outside China than any other country. However, the rate of growth of Chinese enrolment is slowing. Since 2013, when 70% of the country’s leadership was replaced, political, economic and societal changes have swept across the country. China’s economic growth, based on exports, is being replaced with the Chinese leadership attempting to recalibrate the economy with an economy focused on service and technology.

In an article in Foreign Affairs, author Eric X. Li quotes an unnamed Chinese source as follows: “China is unstable at the grass roots, dejected in the middle strata and out of control at the top.” International colleges and universities, basing future Chinese enrolments on present-day data, should take note. China will continue to be a major player in international higher education but its role and the number of students electing to study abroad will change in the future.

INDIA

In 2014, nearly 200,000 Indian students studied abroad. This represents the second largest source of globally mobile students. The Indian government, in addition to spending substantial sums on improving Indian institutions of higher education, is reaching around the globe to establish collaborative ventures. The recent US - India rapprochement will result in academic and student exchanges and will create opportunities for the US to exert ‘soft power’ in that strategically important part of the world. While China and India will remain important exporters of students, it is important to note that China, has set a target of enrolling 350,000 international students by this year and the Indian government plans to pour millions of dollars into improving Indian colleges and universities in an attempt to attract international students to its campuses.

THE MIDDLE EAST

Qatar, Dubai, Abu Dhabi and Saudi Arabia have spent collectively billions of dollars importing higher education institutions to the region and have become a country-level education hub, educating thousands of students each year in both undergraduate and graduate programs. However, caution should guide higher education international strategists to consider the political turmoil in the region, as well as the impact of the declining price of oil and the political instability that may follow the replacement of ageing monarchs.

Future Student Mobility Patterns

There may be several other parts of the world that will, in the future, become major players in international education. I would like to focus on two, East Asia and Southeast Asia and Africa.

EAST ASIA AND SOUTHEAST ASIA

This part of the world has experienced tremendous economic growth over the past few decades, creating a generation of affluent middle class families willing to send their children abroad for university training. The governments of Malaysia, Indonesia, Thailand, Taiwan, Vietnam and Singapore have made education a priority and have invested heavily in higher education. The populations in these countries are young and technologically savvy. The political and economic infrastructure has created a climate to support increasing education across all segments of society.
AFRICA
I believe that Africa has the potential to become one of the new hotspots in international higher education and recruitment. Consider the following:
• Six of the world’s fastest-growing economies between 2001 and 2010 were in Africa.
• There are over 450 million people in Africa, representing 15% of the world’s population.
• 70% of the population has cell phones
• Marriott plans to open 50 hotels in Africa by 2020.
• Global companies are expanding in Africa: vast deposits of oil, gas and minerals are being discovered. Goldman Sachs recently issued a report, Africa’s Turn, comparing business opportunities in Africa today with those of China in the early 1990s.
• Google is the single biggest private sector in Africa. Its internet and email services are transforming the continent. The company is also helping specific African countries to digitise information and making it freely available.

PREDICTIONS
The late movie mogul, Sam Goldwyn, once said: “Never make predictions, especially about the future.” Despite Mr. Goldwyn’s advice, I make the following predictions:
• Despite the challenges and changes in international higher education, future trends in international higher education will continue to witness an increase in internationally mobile students.
• The single most transformative trend in international higher education will be the use of technology as a credible and acceptable educational delivery method. Many students may study abroad but they may do so never leaving their home country. Technology and today’s digital “native” will determine not only future educational delivery methods but will also bring new players into the market. The increasing availability of telephone and Internet connections will unite students worldwide and make higher education available to students who otherwise could not afford to attend university outside their home country.
• Technology will encourage the rise of global universities. These universities, rather than single institutions, will become the norm in the future.
• Telecommunication options will become standard collegiate practice, with students taking some classes at home, some on campus, and some in employee settings.
• The balance between in-country enrolments and off-shore enrolments will shift in the direction of off-shore.
• Regional educational hubs will impact students from the region enrolling in traditional markets, like the U.S. and U.K.
• Strategic alliances will change current international recruitment practices.
• For-profit institutions will expand their educational services, as distance and e-learning providers. Blended learning, combining online and classroom teaching, has the potential to become the dominant form of university-level instruction for students in certain regions of the world.
• As long as the middle class continues to grow across the globe, especially in the developing world, demand for postsecondary education will continue to outpace supply.
• Most countries will continue to enrol international students as a way to build intellectual capital and remain competitive in a globalising world.
• No one country will dominate the international student market and there will be no such thing as a typical international student. Students will migrate to international destinations based on price, visa eligibility, post-graduate employment opportunities and the perceived return on their educational investment.

Conclusion
Perhaps this Chinese proverb best sums up the current and future stage of international higher education worldwide: “If we do not change our direction, we are likely to end up where we are headed.” There are many challenges ahead in international higher education. There are also many opportunities.

About the author
Marguerite J. Dennis, President of MJDennis Consulting, is an internationally recognised expert in international student recruitment and graduation. With more than 25 years experience working with colleges and universities in the United States and abroad, she has authored six books and more than 50 articles on college administration, financing and student progression and graduation. Marguerite’s area of expertise is assisting colleges and universities to develop and implement sustainable and synergistic international strategic plans. She has assisted schools in: Chongqing, China, Ho Chi Minh City, Vietnam, Kyoto, Japan, Tbilisi, Georgia, Taipei, Taiwan, Johannesburg, South Africa and Florence, Italy. She helped found a branch campus in Dakar, Senegal and Madrid, Spain and conducted a series of international seminars on global trends in higher education for the staff of Education USA offices around the world. Marguerite has lectured at the Harvard Institute for New Presidents on enrolment management and retention. Marguerite is a member of the Board of Trustees of Regent’s University London and of the Observatory on Borderless Higher Education Advisory Board. She is on the editorial boards of Recruitment and Retention in Higher Education and Enrolment Management Report.
How to capitalise on the internationalisation of higher education?
An overview of Magnet Cities and Global Leader Experiences

Andy Coxall, CEO, Common Purpose Student Experiences

The global market for higher education is flourishing – in 2012 at least four million students travelled overseas for their higher education and this number is set to double by 2020. How can universities, host cities and students get the most from this unprecedented co-location?

Common Purpose has been running leadership programmes since 1989, and specifically for university students for over ten years. Delivering student programmes in 20 countries so far, we have worked with Harvard, National University of Singapore and University College London among many other higher education institutions. Common Purpose Student Experiences is an independent, not-for-profit, international leadership development organisation whose aim is to develop the next generation of global leaders as an active and collaborative network. We believe that by delivering on these aims, we will add value to the internationalisation of higher education, but what has been our experience to date? And what might universities and their students, corporate employers and the cities that they operate in, stand to gain from being part of the collaborative global network we are convening?

Common Purpose leadership programmes have their roots in the UK. Our first programmes brought together senior leaders from the private, public and not-for-profit sectors to foster the skills, connections and inspiration needed to tackle the complex problems within their cities. Since then we have expanded our audience, both in terms of career stage and geography. In 2004, we extended our offering to include university students. We saw that universities often act as communities within communities, but many students never fully get to grips with the city in which they live and study. Our Frontrunner programme has since seen thousands of students gain a better understanding of leadership and their cities.

By 2012, we realised the unique impact of our global programmes for senior leaders crossing boundaries. Given the anticipated increase in global student mobility we saw an excellent opportunity to get students from different cultures to learn from each other and we added a programme to our student portfolio, the Global Leader Experience.

One of the cornerstones of our thinking is that leaders need Cultural Intelligence (the ability to cross divides and thrive in multiple cultures) to be able to tackle the complex problems that span boundaries – be they geographical, sectoral or generational. Cultural Intelligence (or Cultural Quotient, CQ) is ever more resonant and necessary in an increasingly globalised, interconnected and fast-paced world. We want to ensure that this next generation has the CQ, leadership skills and global networks to be able to tackle these issues and change the world.

“In our ever more complex and interconnected world which has no obvious historical parallel, Common Purpose has developed a breakthrough idea about the importance of cultural intelligence in order to both navigate this new world and its contradictions. It has important implications and raises questions about our current systems for those of us involved in educating and developing our future global citizens.”

Rakesh Khurana, Dean, Harvard College

How are we doing this?
Working with i-graduate who run the International Student Barometer (ISB), the world’s largest survey of
the international student experience, we looked at the cities where students were congregating; the major educational hubs of the world. If we want to develop the next generation of global leaders then these cities and students are the ideal place to concentrate our efforts. We coined the term ‘Magnet Cities’ as the places which draw young talent to them and developed a programme to run in these cities for these students - ‘Global Leader Experiences’ (GLEs).

We started by piloting GLEs in Oxford and Johannesburg two years ago and plan to run programmes in 50 Magnet Cities by the end of 2016. We are halfway there and have reached cities such as Dubai, Hong Kong, London, Mumbai, Montreal and Singapore.

What happens on a programme?
Each year a Challenge is set by an independent curriculum think tank; most recently this has been chaired by the News Editor of a global news agency. The Challenge is then addressed in every city hosting a GLE that year. The Challenge must be globally relevant and compelling enough to demand action at a local level. For example: “What makes a city smart?”, “How do you get societal – as well as economic – value out of technological innovation?” or “How do you prevent city sprawl?”

We use the Challenge in two ways:
- To empower students to develop projects that they can make happen in their city – deepening their connection to the locality and its communities and enabling them to have a societal impact.
- As a learning tool, so that students understand how to tackle complex issues within the power system of a city and how best to leverage the value of a diverse team. The GLE brings together 100 students from at least 25 nationalities, across all academic disciplines, at both undergraduate and graduate level and from multiple universities across the city.

Over the four days of the programme, students:
- Go off campus to meet city leaders from across business, government and NGOs
- Grow to understand how a city works and doesn’t work
- Learn CQ from the city and each other
- Work in diverse groups to develop innovative ideas
- Are supported by Group Mentors from a Corporate Partner
- Present their ideas to a panel of city leaders and policymakers.

“I have learnt the beauty of embracing and learning from different cultural viewpoints – people bring their own flavour and fresh perspectives – and to develop critical thinking under pressure. I will be a more well-rounded and culturally aware leader back home.”

Dalisu Jwara, student, University of Cape Town

Who are the partners we work with to make this happen?
Each Global Leader Experience is built on a unique partnership, convened by Common Purpose, comprising a Corporate Partner, University Partner and a Magnet City who share our vision and passion of developing the next generation of leaders.

An example of how this works in practice:
Boston, MA, USA.

The University Partner is Harvard College, whose Office of Student Life is the internal sponsor and hosts the programme during its Wintersession – a week-long enrichment period, during which time students can participate in extra and co-curricular development programmes. Harvard, as University Partner, hosts the programme on campus and receives half of the places for its students in return. Along with venue space and students, the University Partner involves staff and faculty as contributors sharing their experience or expertise with the students. Through this first-hand engagement, staff at institutions such as University of Bristol and Singapore Management University have gone on to seek further development of their own CQ through attending Common Purpose’s flagship global programme for senior leaders, CSCLeaders. This begins to embed an understanding of CQ across the institution, both at a student as well as an administrative and faculty level.

The remaining places on the programme are open for students across the city so that the overall participant group is a rich mix of academic disciplines, nationalities and interests from a range of institutions. The programme is free to attend for students, with an application process which requires applicants to reflect on three questions:
- A leadership experience, big or small, in which they
have learnt something about themselves;
• What they hope they can gain from participating in the GLE;
• What they feel they can contribute to the breadth of perspectives of the group.
They are also asked to write a short biography which shares something of their previous experiences, interests and ambitions.
The Corporate Partner enables the programme to happen, with £20,000 of sponsorship or £200 per head for the development and delivery of the programme in that city, ensuring that the programme has no cost for students. Since 2012 we have worked with global organisations such as BP, Goldman Sachs, Prudential, DP World and Power Corporation of Canada to run GLEs.

“Common Purpose and its University Partners have been working together for many years. The result is a game changer, developing the key leadership competencies needed today, whilst connecting students, cities and employers across a truly global network.”
Jonathan Donner, Chair, Common Purpose Student Experiences and Vice President, Global Learning and Capability Development, Unilever

The partnership goes much further than a financial exchange for brand recognition on the programme materials. Senior executives from the Corporate Partner – The Weir Group in Boston for example – work with the students as Group Mentors on the final two days of the programme. Not only does this allow the Corporate Partner the opportunity to contribute directly to the development of the participants, it also offers a valuable learning experience for the Mentors themselves. Working with a culturally diverse team of young people to support and coach them through an intensive innovation process gives the Mentors the opportunity to test and hone their own leadership skills and CQ. Moreover, it gives the students an insight into the sponsoring organisation first hand, through establishing a meaningful connection with their senior staff. As a result of the Boston programme in January, The Weir Group invited one of the students, a Mechanical Engineer at MIT, to pursue a summer internship.
The Magnet City itself is a unique part of this programme, bringing context and reality to the programme, as well as contributors who open their workplaces to give the students a first-hand insight into the Challenge from a local perspective. On the most recent GLE in Boston, students were addressing the Challenge ‘What makes a city smart?’ and their exposure to the city came from visits to organisations large and small, across the public, private and not-for-profit sectors. The students visited organisations such as the Boston Regional Intelligence Centre, part of the Boston Police Department, Microsoft and JVS, a skills and employment agency in the city.
To recruit students for GLEs, we also partner with organisations such as the Fulbright Commission, AIESEC, the major internship and volunteer organisation, and All-China Youth Federation as well as student societies and unions on campus.

Beyond the four days of the programme
As GLEs move around the world, students track the progress of the Challenge online over the year and see how it is dealt with in very different contexts. They look for areas for collaboration with their peers and provide input to each other’s ideas. A truly global network comes to life for them.

How are we leveraging digital technology to create the network?
To further this ongoing global network, students collaborate on the Common Purpose Massive Online Innovation Community (MOIC). This is an innovation crowdsourcing platform, powered by our technology partner Crowdicity. It gives students a forum to continue to work with their peers, to create further iterations of their projects with input from the network and then take those projects offline into their cities and the world.
It also provides space for students to work on new global challenges set by senior leaders such as the recent one from an international NGO: “How do you remove child labour from the supply chain?”
As well as building an alumni network, participants can connect on the MOIC with senior leader alumni from Common Purpose programmes around the world.

The outcomes
At the end of each day and at the end of the programme, we administer a series of assessments. Our main Key Performance Indicator is whether the students feel it has been ‘Excellent Value for Time’ on a scale of 1 – 6. We calculate the percentage of students who rate the programme 5 or 6 and we average 92%. We also take a percentage of students who ‘strongly agree’ that they’ve developed certain skills and competencies. On average across GLEs we find that:
• 93% increased their CQ
• 92% developed their ability to work with people from different cultures
• 93% engaged with different cultures and diversity
• 91% grew a global network
• 87% developed their ability to tackle global challenges
• 89% are more willing to take risks and make change
• 88% have confidence in their leadership skills
• 86% developed their problem solving skills

In August 2015 we introduced a self-assessment tool through which alumni can measure their learning six months beyond the completion of the GLE they attended. The assessment focuses on
their development across four areas: leadership learning, broader networks, better decisions and bold innovation.

“It has changed my perspective and priorities in ways I could have never anticipated. Cultural Intelligence, and my desire to continue to improve my own CQ, has influenced every decision I have made since the programme.”

Riley McAuliffe, student, University of Melbourne

The value of internationalisation in higher education

Looking to the future, Common Purpose recognises the importance of enabling this generation of students to continue to develop their skills and networks. Participation in a GLE is just the start of a lifetime of leadership. Through the MOIC and other programming, Common Purpose is exploring ways to extend our offerings.

We are hugely excited about the value of internationalisation for developing the next generation of global leaders. By congregating in Magnet Cities and developing CQ, students are uniquely positioned to begin to tackle the challenges of today and tomorrow. Through GLEs, Common Purpose aims to maximise the opportunities presented by the internationalisation of higher education.

*Who are international students? Thinking about student diversity beyond “international”*

Richard Garrett, Director

Who are international students?

That may sound like a simple question, but the answer is often circular. Countries and institutions that compete to enrol international students routinely report their number, nationality, level and field of study and perhaps their financial contribution to the region or country, but it is hard to find much more detail about their background and circumstances. The word “international” is a demographic marker in its own right, but one that tends to close off further questions.

To study for an entire degree in another country remains an elite option, driven by academic exceptionalism but also financial means. Out of an estimated 180 million higher education students in the world, fewer than 3% obtain a degree abroad. Does this mean that we should not expect much socio-economic diversity from such a rarefied population? When international students represent much-needed revenue for cash-strapped institutions, should we expect leaders to care?
Global engagement takes many forms in higher education, from massive online learning ventures to study abroad programs and branch campuses. In January 2015, the University of California, Berkeley publicised a fresh vision of what international collaboration could look like – the Berkeley Global Campus.

The campus, which is planned to open later this year though without a definite date, will engage in research and programming across a range of disciplines, initially for graduate students from the US and abroad. The plans reflect the University’s desire to build a global education hub at home, rather than exporting a Berkeley education to other countries.

What led UC Berkeley to develop this new model, and what are its parameters? What does the Berkeley Global Campus (BGC) hope to achieve, and how will it circumvent some of the problems that the international branch campus model has encountered? Might this type of collaboration be a fit for other top research universities around the world?

Purpose and Parameters

The BGC’s stated reason for existence is to foster an interdisciplinary approach to global problems like climate change, income inequality, epidemic diseases, and sustainable energy. Because these problems are transnational, UC Berkeley Chancellor Nicholas Dirks advises that they stand to benefit from the combined strengths of universities, governments, and private sector partners around the world. Rather than tackling these problems abroad, the BGC seeks to partner with foreign universities on its home turf: a site already owned by the university in Richmond, California, six miles northwest of the main campus and around one hour’s drive from Silicon Valley. The site of the global campus was originally intended to become an extension of the Lawrence Berkeley National Lab. Progress on the campus was halted due to federal budget cuts in 2013.

The partners will provide the resources to conduct research, translate that research into practical goods and services for society, and train, educate, and employ youth with the skills and knowledge required to continue to confront the issues addressed by the BGC. UC Berkeley plans to create a two-year residential scholarship program for graduate students from the US and abroad, inspired by the Rhodes Scholarships offered by Oxford University. Students will spend their first year studying an interdisciplinary curriculum focused on global citizenship, before specialising during the second year. The BGC may eventually expand to engage undergraduates in the research. The BGC may offer dual degrees, or stand-alone degrees from UC Berkeley.
The Observatory is a higher education think tank with institutional members across 30 countries. Our unique remit is ‘borderless’ higher education worldwide – innovations such as online learning, internationalisation in all its forms and commercial competition and partnerships. We offer analysis on trends, business models and policy frameworks.

Our purpose is to provide strategic intelligence for education leaders and policymakers attempting to navigate the opportunities and threats of borderless higher education.

**EXAMPLE RESEARCH AREAS**

- Use of agents in international student recruitment
- Branch campus models and other forms of transnational education
- MOOCs, the online and open-access learning revolution
- Comparative developments in immigration policy as they affect international students
- New regulatory frameworks
- Impact of transnational education on traditional student mobility
- Private and for-profit providers and public-private partnerships

**MEMBERSHIP BENEFITS**

- Full access to our extensive online archive of reports and articles dating back to 2002
- A substantial reduction on the registration fee for our conferences
- News analysis
- Opportunities to publish research with the Observatory
- Access to our strategic consultancy service: we provide customised primary and desk research
- Regular reports on a wide range of topical issues: in-house and from experts around the world

**STANDARD RATE  (PLUS VAT IF APPLICABLE)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not-for-profit educational institutions and organisations</td>
<td>£1,100</td>
</tr>
<tr>
<td>Not-for-profit education institutions located in a ‘developing’ country</td>
<td>£650</td>
</tr>
<tr>
<td>For-profit education institutions, private corporations, and government departments and agencies</td>
<td>£1750</td>
</tr>
<tr>
<td>National or regional inter-university bodies</td>
<td>£550</td>
</tr>
</tbody>
</table>

**THE NEXT STEP**

E-mail info@obhe.org or call +44 (0) 1737 378 434 for more information.