

## Global Positioning: The Coming Years

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### Introduction

21st-century universities aspire to an increasingly borderless condition, both in research and in education. The growth in international research collaborations is evidenced in multiple authorship data for journals. Cross-border mobility of post-secondary students now exceeds 3 million (out of 144 million), the majority of whom come to English-speaking countries.

The United Kingdom holds a high global position in higher education. In research excellence and connectivity it is only systematically eclipsed by the United States. In international education it is the favoured destination, in raw post-secondary student numbers (330,000, in 2006), after the United States (584,000); and, in percentage terms, the third destination (14 per cent, in 2006), after Australia (20 per cent) and New Zealand (17 per cent). This paper will concentrate upon global positioning of the educational, rather than the research, aspect of British higher education institutions (HEIs). It looks at competitiveness in student, rather than staff, markets.

The continuing economic crisis of 2008-9 significantly affects British HEIs. "This is a time of great intellectual confusion and uncertainty," writes Laza Kekic, director of Country Forecasting Services at the Economist Intelligence Unit. "The current crisis is raising scepticism about free markets in general. This will have an impact on the regulatory environment in many countries, well beyond the financial sector." (Press release, 20 May 2009, [www.eiuresources.com](http://www.eiuresources.com))

While highly global, international education is not a highly globalized business. It fails the standard tests: its transactions are not transparent; its jurisdictions are still strongly national; and there is effectively no global "convertible currency" (for instance, of credit transfer) in the field. Higher education, even in the UK, is still strongly a domain of national citizen, as against non-citizen, entitlements; of national schemes of employment; and, of generally local institutional governance.

This distinctive blend of local, national and global characteristics – sometimes deliberate, sometimes the mere accumulation of history – means that universities have more options than many industries at this time of "confusion and uncertainty", but are also more easily confused because of their multilevelled operations. Better information and analysis, smarter communications and quicker service are key elements of success at such a turbulent time.



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## A. Overview

British universities are technically autonomous, and a declining percentage of their operating costs comes from public revenues; yet they retain high levels of public accountability and government regulation. The increasing percentage of private income comes especially from the tuition fees of international undergraduate students (as distinct from UK and European Union students) and unsubsidized postgraduate students of all nationalities. For some institutions, such as the London Business School or the London School of Economics, these fees comprise a very high, even a majority, percentage of all revenues.

In enhancing their global competitiveness British HEIs exploit many levels of affiliation and identity other than the institutional: School (such as the University's Business School), regional (Study London), mission (Russell Group), national (British Council), European Union (League of European Research Universities), international (Universitas 21). Since around 2004, British HEIs have increasingly formed partnerships with global for-profit education providers of international students (Kaplan, INTO, Navitas, Study Group). These public-private partnerships appear likely to grow further, not just in providing suitably prepared students for higher education but also aspects of higher education itself. The past decade has seen more systematic and increasingly delegated use of in-country agents, and also UK-based agents for the many international students already studying within Britain.

The institutional, then, is only one of many levels at which global educational interactions occur. This is one reason why league tables have diversified, to include disciplinary, university group and, even, national rankings. Increasingly, the information and analytical base for institutional planning and decision-making relies on sectoral (UUK's International Unit), national (HESA, British Council), or international (UNESCO; I-graduate) intelligence and advice.

Competition raises the key question "with whom?", as international student choice is most keenly felt in the local, rather than the global, market place. Similarly, it is not clear whether the French, Germans or Dutch are European colleagues or competitors in the race for international students. (Their own citizens must, of course, be treated equally with UK students, at least as far as fees are concerned.) The Prime Minister's Initiative of 1999, and renewed from 2006, is something of an us-versus-them latter-day "space race". It has been highly successful, none the less, in reinforcing a national brand for British higher education and in meeting escalating national targets for international students and, hence, contribution to the economy.

The renewed PM's initiative of 2006 recognized more explicitly that international education "is not merely an export industry. It helps to build friendships with people from around the world, enabling us to understand more about each others' cultures and opening the doors to greater trade, investment and political influence." ([www.britishcouncil.org/eumd-pmi2](http://www.britishcouncil.org/eumd-pmi2)). It recognized that continuing success depends upon a high reputation for quality, value for money, global contribution and strength of partnerships.

The 2020 Vision: Forecasting International Student Mobility exercise of 2004 crisply asserted five strategic policy areas: ensuring quality; responding to global competition; building [institutional] capacity; presenting diversity [and meeting student choice]; delivering globally ([www.britishcouncil.org/eumd\\_-\\_vision\\_2020.pdf](http://www.britishcouncil.org/eumd_-_vision_2020.pdf)). These areas provide one frame for the reorientation of physical, social, curricular and informational planning, whether international student provision is on- or off-shore.

## B. Planning

Most British HEIs have internationalization strategies, which outline aspirations for institutional/group partnerships, research collaborations and widely varying international student recruitment targets for the coming years. Those targets, of three to five years horizon, generally vary between 10 and 50 per cent of institutional student numbers, depending on location, history, disciplinary mix, and desired undergraduate/postgraduate balance. These strategies often include plans to internationalize the curriculum, diversify university social life and produce graduates who are “global citizens”.

Institutional planning tends to be less clear concerning the building of human and physical capacity to match these aspirations, and how social (for instance, washing/prayer) or curricular (degree format) provision might change to meet growing student diversity. This is partly through lack of resources, but also through some scepticism about the achievability of targets or lack of international experience among the planners themselves. Capacity issues, then, tend to be addressed in arrears, sometimes creating tensions among existing staff and students, and a perception among international students of overselling on student service.

Institutional planning also largely ignores the “import” potential, that is, of reciprocal movement of home students to institutions abroad. Few British institutions have the commitment of leading US universities to making an international experience (study or work abroad) accessible to every student, with corresponding mobility of financial aid and scholarships. This is a crucial area for future planning development if home, as well as overseas, students, are to be offered a truly global experience, not just “bringing the world back home”. The dwindling foreign-language skills among UK students suggests there is urgent need for a huge boost in outward student flow.

British HEIs have been relatively cautious about delivering their degrees through fully fledged off-shore campuses, although leading examples are the University of Nottingham’s Ningbo (China) and Semenyih (Malaysia) campuses. Restrictions on repatriation of profits, along with concerns about political stability and freedom of speech, are two reasons for this, sometimes misplaced, caution. However, at least half UK universities engage in some form of transnational education; articulation arrangements, with in-country study followed by study in the UK, are popular because of their simplicity and clear jurisdictional accountability. Multi-jurisdictional accreditation is also a growing phenomenon, but from a low base. Very few British HEIs have, for instance, yet sought accreditation as HEIs in North America.

International planning emphases are often embedded within broader institutional questions: addressing disciplinary areas (sciences, engineering) with shortages of home demand; cross-subsidizing domestically loss-making areas (performing arts); spreading risk through avoidance of geographical over-concentration (China) of source countries; balancing of subsidized aid, as against full-cost trade, in the international student profile. The planned blend of face-to-face, distance and virtual educational



provision can be of major significance to global competitiveness. For PhD students, total e-journal and institutional repository access can be significant in institutional choice. The connectedness of the library provision that benefits all twelve CIC universities in the US is a model that UK university groups might emulate.

Institutional media planning is now attuned to handling issues of racist violence (Muslims in US universities, Indians in Australia), academic integrity (Chinese in New Zealand) or "foreigner backlash" (continental Europeans in UK institutions), which can easily gain sensational coverage in the concerned source countries. So, too, global competitiveness is susceptible to substantial effects from success in handling disease (swine flu), terrorism (London bombings), changed regulations (visas), and economic crises (exchange rates, banking confidence), although here institutional planning is largely overridden by national and international dictates.

## C. User Expectations

Institutional staff and existing students are key information and communication technology (ICT) users. For effective global positioning, potential students, their families, agents, employers and broader communities are also seen as key users.

The institutional website is now the primary tool of communications, information, and marketing. Its size, visibility and academic purpose are subject to scrutiny and ranking. Current [www.webometrics.info](http://www.webometrics.info) tables show the UK ranks fourth behind US, Germany and Canada universities, with the top UK institution, Cambridge, globally ranked 28th. The expectations of the diverse band of users are highly varied, and increasingly one class of user will access information designed for another. Market information of use to HEIs in establishing competitive advantage may, for instance, be used by prospective students to weigh up relative value-for-money.

Rankings are used by universities primarily to make claims of relative prestige and market position, but are used very differently by agents, students and families. Although originally fixed-weighted in areas of easier international comparability, particularly research (Shanghai Jiao Tong), these rankings have become both more comprehensive and more interactive. Hence, they are becoming more usable by prospective students with the widest range of aspirations, which often relate to social, financial and cultural issues as well as prestige. A new global ranking initiated by the EU promises a "multidimensional measure of education, research, innovation, internationalisation and community outreach" ([www.rankingwatch.blogspot.com](http://www.rankingwatch.blogspot.com), 3 June 2009). More practical for student choice is [www.phds.org](http://www.phds.org), founded in 1998, which is an interactive site, providing user-weighted graduate school and subject rankings, along with job and career resources for PhDs. The potential student balances size, prestige and expense against such criteria as educational quality, faculty reputation, tuition, funding support, student demographics, programme size, and undergraduate selectivity.

While HEIs often seek to benchmark with each other, all users compare ICT provision with that of their daily lives, such as on-line banking, shopping, purchase of travel or accommodation. This means that institutions need to provide a one-stop-shop for all



study-and-immigration questions, or at least to arrange for all such information to be easily linked through one portal. Beyond course, cost, admission and application information prospective students want to know about the choices they may need to make concerning accommodation, on-campus jobs, health, insurance, taxation, personal security, transportation, banking, police registration, and social, religious and cultural practices. This circumstantial information may be crucial to students, and their families, in deciding between countries as much as between institutions. The availability of that information in clearly authorized forms, with polished (rather than automated) translations of key passages into main source-country languages, can reassure parents paying the fees, as much as the potential student, that the right choice is being made. Leading continental European universities now provide excellent models of multi-lingual sites.

The Economist Intelligence Unit in a 4 December 2008 presentation "Forecasting International Student Demand" to the British Council, noted: "International student business is a complicated market offering a sophisticated service; relatively youthful industry; still not capturing all influences and drivers, data limitations etc." HEIs, and increasingly consortia of institutions, want to base marketing priorities upon more refined information bases, including projections of economic growth, knowledge of secondary education quality, exchange rate movements, fee-paying capacities and migration constraints, as well as cultural factors affecting assimilation (religion, gender, personal safety).

A key, and underplayed, driver in international student movement is immigration.

The new UK points-based immigration system, introduced in 2009, stresses international student entry as one of five tiers of immigration (Tier 4); indeed, for many students it turns out to be the first stage of skilled migration (Tiers 1 or 2). Planning for these immigration-related needs, as part of student recruitment and support, becomes more important for UK universities as competitor countries (New Zealand, Canada, Germany, Norway, Japan) promote study-to-work immigration, particularly in areas of national skill shortage. Their experience is that international graduates of home institutions assimilate better and gain more immediate workplace acceptance. This is because of their age, the cultural and linguistic competencies they have acquired during study, and because their credentials are locally recognized. Many often have significant in-country work experience.

One Australian Education International study of 2007 found that immigration (permanent residency) featured very strongly in the international study choices of Chinese students and a majority of Indian students (see [www.apru.org/\\_files/ssm/2009/Lesleyanne%20Hawthorne%20Student%20Migration.pdf](http://www.apru.org/_files/ssm/2009/Lesleyanne%20Hawthorne%20Student%20Migration.pdf)). Universities often fail to address this means-to-an-end purpose of international student mobility, preferring to limit their promotion to the benefits of courses and institutions, rather than careers and lifestyles. In contrast, some Australian universities do legitimately alter course structures and durations to maximize the immigration points advantage to their international students. This gamesmanship can gain a backlash, however, in times of growing domestic unemployment ("Student residency regulated", *The Australian*, 17 June 2009).

As study and migration become increasingly intertwined, advice about quality assurance, qualification recognition and professional accreditation becomes ever more important. This advice needs to be put in a context of global decision-making and risk-taking. Typically: will our Egyptian daughter's UK degree be professionally recognized in Canada? These short-term decisions about study location are often based upon

long-term preferences for family resettlement, in which comparisons are being made as much between countries as between institutions and courses.

This typical question, above, also raises the issue of whether a student coming to study in the UK necessarily wants to study for traditional hallmark qualifications: the three-year intensive Honours degree, or the thesis-only PhD. In an increasingly competitive market, depth and breadth questions of student preference need to be tested, possibly leading to greater UK institutional diversity in qualification offerings.

HEIs in the UK often want better-qualified, rather than more, students. This is because of supply questions in certain disciplines and levels (postgraduate, undergraduate) and also because of the better yield possible from better international students. Many also monitor the relative number of students from still developing markets (Nigeria, India) and mature, even competitor countries (Canada, United States) in the interest of building interactive learning communities, modelling global citizenship, and also spreading risk.

Current forecasting models are more attuned to quantity than quality of international student demand, although greater tuning to year-by-year shifts in student aspiration is now becoming possible. The British Council's new (2008) predictive tool of student mobility, devised in collaboration with the Economist Intelligence Unit, has such subtlety. It predicts, for instance, a fall in Chinese student numbers in UK from 2011, with changing subject emphases and increasing concern for value for money. In consequence it recommends more collaborative partnerships with China, especially in science subjects and research. ([www.britishcouncil.org/forecasting\\_international\\_student\\_mobility\\_-\\_executive\\_summary.pdf](http://www.britishcouncil.org/forecasting_international_student_mobility_-_executive_summary.pdf)) Another tool, used by over 200 institutions, including some in the UK, is the International Student Barometer of I-graduate ([www.i-graduate.org/services/future\\_student.html](http://www.i-graduate.org/services/future_student.html)), which now draws on feedback since 2005 from more than 400,000 students.

## D. Recommendations and Conclusions

This short overview has summarized current and emerging issues affecting the high global positioning of British higher education. These issues have direct, and indirect, relevance to the provision of ICT specialist support for institutions: the primary rationale for JISC. The report notes, however, that the institutional is only one of several levels at which support is needed for effective global positioning.

Key planning issues include: the demarcation of international collaboration versus competition; the mechanisms for enhancing ICT services in an age of economic upheaval and pandemic; the projection of future international student capacity (on- and off-shore; face-to-face and virtual; disciplinary and level); growth of mobility of UK student abroad; balancing of quality and quantity in international student demand.

Key user issues include: web usability and competitiveness; interactivity of ranking information; enhancement of individual market data and analysis; the relationship between international student movement and longer-term immigration; reliability of quality, qualification and accreditation data in a context of global mobility.

For such a significant global industry it is remarkable how unglobalized international education remains. Citizen entitlement, barriers to efficient credit or staff transfer, patchy trans-national regulation, and competing educational rationales mean that the market will remain unglobalized for some decades to come. The relative disarray of

global education makes reliable information, smarter communications and quicker service essential for maintaining competitive advantage. The comparative international lateness of HESA statistics needs addressing, although the British Council's on-going, on-line [International] Student Decision Making Survey ([www.britishcouncil.org/eumd-information-student-decision-making.htm](http://www.britishcouncil.org/eumd-information-student-decision-making.htm)), initiated in 2007, should become an increasingly useful tool.

During the first decade of the new millennium English-speaking nations gained a dominant position in international education. That dominating position is now challenged by the increasing emergence of programmes of quality, taught in English: in Europe (France, Germany, Netherlands) and East Asia (Singapore, Hong Kong, Malaysia). Moreover, international student fee levels in these countries often involve a government subsidy unlike the "full-cost recovery" models in many original English-speaking countries. As well, some countries, such as China, are successfully pushing for programmes in their own languages, and see this as an important part of economic, cultural or regional promotion. These various circumstances can threaten the UK's high market position.

As new international education hubs emerge, British HEIs need constantly to reassess marketing targets. Slowly these targets are moving away from East Asia towards South Asia (Indian subcontinent), Africa (Nigeria), and in coming years to other areas with "surplus" educated young people (Iran, Latin America). This continental drift will rely upon highly sophisticated market forecasting.

Institute of International Education (New York) President, Allan Goodman commented in May 2009: "The challenge to each higher education institution is to answer the questions of who, what, where, when, and how such mobility can best be promoted and why, fundamentally, it is desirable." ([www.iie.org](http://www.iie.org), 6 May 2009 release) These questions become harder, rather than easier, for individual HEIs to answer as a distinctive global experience becomes an expectation of growing cohorts of postsecondary students in so many parts of the world.