

6<sup>th</sup> IAU GLOBAL  
SURVEY REPORT

# Internationalization of Higher Education: Current Trends and Future Scenarios

Giorgio Marinoni  
Siro Bartolome Pina Cardona

“The IAU 6<sup>th</sup> Global Survey on HE Internationalization represents a significant achievement at a time where the world and the notion of internationalization are increasingly fragmented. The report makes evident the contrasts and similarities across regions and therefore constitutes a significant instrument for university leaders to situate their own practices, approaches and assumptions about internationalization in a global context.”

**Gerardo Blanco,**

Academic Director, Center for International Higher Education,  
Boston College, USA

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# Preface

Since 2003, the International Association of Universities (IAU) has been regularly conducting Global Surveys on the Internationalization of Higher Education. This 6<sup>th</sup> edition has been published five years after the last one. It monitors changes and captures emerging trends over a period during which higher education and its international dimensions have been challenged in unprecedented ways—by the COVID-19 pandemic, the invasion of Ukraine by Russia, geopolitical tensions between China and the Global North, war in the Middle-East and in Africa, and increased concerns about climate change and the prospects of (not) achieving the Sustainable Development Goals as defined in the UN 2030 Agenda. The current geopolitical challenges around the world will again challenge the future of internationalization processes.

The aim of the IAU Global Surveys is to provide a holistic description of internationalization around the world at a given moment in time, and this 6<sup>th</sup> edition comes at the right moment for assessing the impact of disruptions witnessed over the past five years. As we all know, internationalization does not translate into one model that fits all, and changing contexts and challenges at institutional, local, national and regional levels contribute to its diversity.

This has been a consistent finding in IAU's Global Surveys since 2003.

The IAU surveys were launched during a period of optimism, with the Bologna Process; the call for a shift, in Europe, from internationalization abroad and its accent on mobility, to internationalization at home; the call for internationalization of the curriculum and comprehensive internationalization in Anglophone countries (in response to marketization and revenue-generation as drivers for international student recruitment); and the intensification of internationalization in the Global South, to mention the most important trends.

Over the past five years, issues such as inclusion and equity have received more attention, and neoliberal forms of internationalization have been challenged. Positive innovative developments have included virtual exchanges and Collaborative Online International Learning (COIL), joint and dual degrees, decolonization of the curriculum, a more socially responsible internationalization, and increased South-South cooperation.

One should celebrate these new initiatives and actions of internationalization, manifest in the responses to the Global Survey, but we also have to acknowledge that most are still marginal and fragmented, and are present more in discourse than in practice. Exclusion and inequality are still prevailing. The results of the 6<sup>th</sup> Global Survey, based on information and perceptions provided by university leaders in internationalization around the globe, illustrate this tension between ambitious intentions, positive initiatives, and major challenges.

In line with IAU's mission and vision with respect to higher education and its internationalization, the Global Survey showcases these developments in order to assist the higher education community and its survey partners in its effort to enhance quality, inclusion, equity, and social responsibility as key drivers for internationalization for the coming five years during which current challenges and expectations will not abate.

## **Hans de Wit,**

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Member of the Advisory Committee of the 6<sup>th</sup> IAU Global Survey on Internationalization of Higher Education,  
Professor Emeritus and Distinguished Fellow,  
Center for International Higher Education, Boston College

# Acknowledgements

The 6<sup>th</sup> IAU Global Survey is a large-scale research project on which the International Association of Universities (IAU) has worked for more than two years. This report has been produced thanks to the contribution of a large number of individuals and organisations from around the world.

Above all, our thanks go to each institution and its representatives who had a hand in completing the questionnaire. Responding to the survey required extensive internal consultation within the institution to compile the information required. We understand that this process is both demanding and time-consuming. Therefore, IAU expresses profound gratitude to each respondent, as without their invaluable contributions this Report would not have been possible.

The pilot group of institutions, listed in Annex 2, also deserve a note of thanks.

Despite being the main authors of the report, we acknowledge that conducting such a project alone would have been impossible. Thus, we consider the present report the product of a collective effort, both inside and outside IAU.

The 6<sup>th</sup> IAU Global Survey has been a collaborative effort since the start, and we would like to thank all the partner organisations that worked with us. These organisations were members of the Advisory Committee that contributed to the questionnaire design. They also aided IAU in disseminating the survey and by providing comments on the report.

A special note of thanks goes to the sponsoring partner organisations whose financial contribution was essential for the development of the project:

- Agence Universitaire de la Francophonie (AUF)
- Association of Commonwealth Universities (ACU)
- Council of Europe (CoE)
- German Rectors' Conference (HRK)
- NAFSA: Association of International Educators
- Qatar Foundation (QF)
- UNIMED - Mediterranean Universities Union
- Unión de Universidades de América Latina y el Caribe (UDUAL)

We also want to thank all our other partners who provided in-kind contributions, including assisting with the questionnaire design, dissemination of the survey, analysis of the data, and preparation of the survey report:

- Academy for research and higher education (ARES)
- Association of African Universities (AAU)
- Erasmus Student Network (ESN)
- European University Association (EUA)
- German Centre for Higher Education Research and Science Studies (DZHW)
- Global Student Forum (GSF)
- Inter-American Organization for Higher Education (OUI-IOHE)
- National Interuniversity Council of Argentina (CIN)

We would also like to extend special thanks to the Center for International Higher Education (CIHE) - Boston College and Ontario Institute for Studies in Education (OISE) - University of Toronto with whom IAU is involved in a project on "The Future of Internationalisation

Partnerships”, a project funded by the Social Sciences and Humanities Research Council of Canada (SSHRC). CIHE and OISE contributed to the development and analysis of part G of the questionnaire, namely: *Emerging Issues and the Future of Internationalization*.

Special thanks also go to the Agence Universitaire de la Francophonie (AUF) and the National Interuniversity Council of Argentina (CIN) who translated the questionnaire into French and Spanish, respectively.

The quality of the 6<sup>th</sup> Global Survey owes much to the contribution of the Advisory Committee, whose members are listed in Annex 1. They contributed to the project from the beginning, and in particular to the design of the questionnaire and to the writing of the report.

Among the members of the Advisory Committee, a special note of thanks goes to Hans de Wit, former Director of the Center for International Higher Education (CIHE) at Boston College and IAU Senior Fellow who, besides his role in the Advisory Committee, also wrote the preface to the report.

Within IAU, we are particularly grateful to Hilligje van't Land, IAU Secretary-General, for her great support during the project. Hilligje was always available for discussion and reflection on how to make the project a success. Hilligje also played an invaluable role in securing financial contributions from some of our sponsoring partners, without which this project would not have come to fruition.

We thank the IAU Administrative Board and especially the working group on internationalization, chaired first by Andrew Deeks, IAU President and member of the Advisory Committee, and next by Inga Žalėnienė, IAU Vice-President, for all their support throughout the project.

We also want to thank Eva Egron-Polak, former IAU Secretary-General and IAU Senior Fellow, who started the Global Survey on Internationalization series back in 2003, and coordinated the first four editions. It is thanks to Eva that the IAU Global Surveys have become known in the global higher education community as an invaluable resource for those working on or interested in the internationalization of higher education. Twenty years after its creation, the IAU Global Survey on Internationalization remains the signature research project of IAU in the field of internationalization and the only global survey on internationalization. Eva can be proud that this project continues to be relevant not only for the IAU, but for the global higher education community.

Last but not least, we thank all colleagues at IAU who contributed to the project, especially Nicholas Poulton, who edited the final version of the report.

We are particularly pleased to have been entrusted with this captivating research project. We aspire to significantly contribute to a better understanding of global trends in higher education internationalization during these rapidly evolving times.

Enjoy your read!

Paris, 8 February 2024

**Giorgio Marinoni**

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**Siro Bartolome Pina Cardona**

Intern at the International Association of Universities,  
May - July 2023

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# Introduction

In 2023, five years after the 5<sup>th</sup> edition, the International Association of Universities (IAU) conducted the 6<sup>th</sup> edition of the Global Survey on the internationalization of higher education. Five years is a sufficient period to follow changes taking place and to allow for meaningful comparisons over time; waiting any longer and changes may have been too great to allow for any insightful comparison.

However clichéd it may sound, the time elapsed between 2018 and 2022 has seen major changes in the world, all of which are reflected in higher education and its internationalization. During these years the world has witnessed a pandemic, an important shift in geopolitical relations and a worsening of some of the most pressing challenges facing humanity (climate change and sustainable development, a resurgence of war, and forced displacement of populations, just to mention a few).

At the same time, scientific and technological development have continued to make great advances, especially in the field of communication technologies, with the improvement of virtual communication tools and the progression of artificial intelligence. We only need to look at the widespread use of communication technologies during the COVID-19 pandemic. All these changes affected the way people live, think, and interact with each other; they also impacted the world of higher education, in particular teaching and learning methodologies; they stimulated new research and highlighted the important link between higher education and society, calling for a renewed focus on the societal mission of higher education.

In today's changing world, internationalization of higher education has also changed, and some of the above-mentioned developments had a positive effect on internationalization while others did so but in a negative way. Certain simply stimulated the debate on the nature and role of internationalization. This debate happened both inside and outside the academic community and the IAU was no exception.

In 2020, the IAU revised its strategic plan and reaffirmed internationalization as one of its four strategic priorities. In the new strategic plan, IAU revised its vision of internationalization, putting renewed attention on the inclusive nature of the process, both in terms of people and ideas, and on the ultimate goal for internationalization - societal benefit.

IAU's vision is to be the facilitator and promoter of internationalization for all, in which the voices of nations, peoples, and cultures around the world are both heard and listened to equally; internationalization that allows students to grow as globally responsible citizens, that promotes collaboration in research to find answers to the most pressing challenges at global level; internationalization that allows the sharing of experiences to find solutions to local problems and that benefits local communities; internationalization for society and the global common good, internationalization that incorporates the global outlook in institutions.

To turn this vision into reality, IAU is engaged in leading the global higher education community and stakeholders towards this common understanding of internationalization.

To reach this ultimate goal IAU has established strategic objectives, the first of which is that HEIs and higher education stakeholders around the world have a clear understanding of internationalization and are aware of the latest trends and developments.

Conducting research and the global surveys on internationalization are the main tools at IAU's disposal for achieving this objective.

In line with previous surveys, the 6<sup>th</sup> edition aims to understand the current state play of internationalization, its recent changes, and its possible future development from an institutional point of view. The 6<sup>th</sup> global survey is a balancing act between trying to be as comprehensive as possible in terms of the different aspects of internationalization, and as detailed as possible in terms of understanding specific aspects of internationalization, all the while conscious of the effort and time institutions need in order to complete the survey.

We are aware that this balancing act is by nature imperfect, but we are confident that the present report can provide invaluable information on the current state of internationalization at global level as well as interesting comparisons between public and private HEIs and among different regions of the world.

# Structure of the report

The aim of the 6<sup>th</sup> IAU Global Survey is to draw a holistic picture of the internationalization of higher education around the world at a moment in time, and the report presents the analysis of data collected from HEIs around the world via an online questionnaire.

The report follows the same structure as the questionnaire, and after an overview of the statistical data and the profile of the responding institutions each of the eight sections covers a specific aspect of internationalization, as listed below:

- A.** Importance, benefits and challenges to internationalization
- B.** Internationalization governance
- C.** Internationalization of teaching and learning: activities
- D.** Internationalization of teaching and learning: Internationalization of the curriculum at home
- E.** Internationalization of research
- F.** Internationalization and societal/community engagement
- G.** Emerging issues and the future of internationalization

All sections of the questionnaire were compulsory except section F, which was conditional on the reply to the first question; HEIs that identified themselves as “Teaching only institution (no research conducted at all)” were not required to reply to section F.

Internationalization is a vast subject and we wished to cover all aspects of it; however, we could not go into great depth in all these areas which explains why the sections in the questionnaire differ in length. It is for this reason that the current survey report should be considered as a starting point for further research.

# Methodology

The 6<sup>th</sup> IAU Global Survey followed established methodology used in previous editions and in particular for the 5<sup>th</sup> and 4<sup>th</sup> editions.

The first step was to invite all partner organisations from the 5<sup>th</sup> IAU Global Survey to renew their partnership for the 6<sup>th</sup> edition. Out of those contacted, the Agence universitaire de la Francophonie (AUF), NAFSA: the Association of International Educators, and the Belgian Academy for Research and Higher Education (ARES) all accepted. The German Academic Exchange Service (DAAD) were unable to renew their partnership and suggested the German Rectors' Conference (HRK), which did indeed become a sponsoring partner. The full list of partner organisations are as follows:

Sponsoring partners:

- Agence Universitaire de la Francophonie (AUF)
- Association of Commonwealth Universities (ACU)
- Council of Europe (CoE)
- German Rectors' Conference (HRK)
- NAFSA: Association of International Educators
- Qatar Foundation (QF)
- UNIMED - Mediterranean Universities Union
- Unión de Universidades de América Latina y el Caribe (UDUAL)

Partners with in-kind contribution:

- Academy for research and higher education (ARES)
- Association of African Universities (AAU)
- Erasmus Student Network (ESN)
- European University Association (EUA)
- German Centre for Higher Education Research and Science Studies (DZHW)
- Global Student Forum (GSF)
- Inter-American Organization for Higher Education (OUI-IOHE)
- National Interuniversity Council of Argentina (CIN)

In addition, the Center for International Higher Education (CIHE) at Boston College, and the Ontario Institute for Studies in Education (OISE) at the University of Toronto were partners in the survey in the framework of the Future of Internationalization Partnership (FIP) Project, a three-year project funded by the Social Sciences and Humanities Research Council of Canada (SSHRC) and which began in May 2021.

Having secured the support of numerous partners, the second step was to establish the Advisory Committee of experts. Six of the 21 members of the 5<sup>th</sup> IAU Global Survey were invited to renew their engagement for the 6<sup>th</sup> IAU Global Survey - all replied positively. One representative per partner organisations was included in the Advisory Committee, which was complemented by eight new experts to make a total of 32 (six experts from the 5<sup>th</sup> edition, eight new experts and 18 representatives from partner organisations). The list of Advisory Committee members is provided in Annex 1. Terms of Reference for the Advisory Committee were developed and distributed to the members of the Advisory Committee.

The third step in the process was the preparation of the questionnaire. The starting point was the questionnaire of the 5<sup>th</sup> IAU Global Survey, which was submitted to the members of the Advisory Committee, for suggestions on which questions to remove, add and change. The questionnaire was modified, with new questions being added in order to reflect recent developments, and others being retained in order to allow for an analysis of evolution over time. Based on comments from the Advisory Committee, a first draft of the questionnaire was prepared.

The fourth phase of the project was to invite a group of pilot institutions to provide feedback on the questionnaire and fourteen institutions from different regions accepted the invitation. The list of institutions that took part in the pilot phase is available in Annex 2. The institutions were asked to comment in particular on ease of completion, length, and appropriateness of questions. The feedback from the pilot institutions helped identify questions to be removed or modified.

A new version of the questionnaire was then developed and distributed to the members of the Advisory Committee for validation. Once validated, the final questionnaire was sent to the relevant partners responsible for translating it into French and Spanish.

The final version of the questionnaire in English, French and Spanish was created online using the Survey Monkey software and was used to collect data between 16 January and 16 June 2023. The survey was promoted via various communication channels, which are discussed in more detail in the next section.

HEIs were asked to provide data related to the academic year that started in 2021. HEIs were also asked to carry out internal consultation before submitting only one reply. This was to ensure that replies to the IAU Global Survey represented an institutional perspective and not a personal point of view.

Overall, HEIs adopted this approach but nonetheless, the survey did produce 123 double (in some cases triple or even quadruple) replies from the same HEI out of the total number of 782 replies received. The duplicate replies were analysed separately and Annex 3 presents the results of this analysis. Such replies can be divided in two types; “type 1” is the same person replying twice to the survey; “type 2” is where two or more persons inside the institution replied to the survey. Only one reply per institution was retained for the overall analysis. For “type 1” replies, only the most recent reply was retained (e.g. June vs. April); for “type 2”, only the reply sent by the most senior position inside the institution was kept (e.g. head of institution vs. head of international office, head of international office vs. head of department) unless one of the replies clearly mentioned that there was consultation inside the institution. On top of this, the survey underwent a cleaning process to remove counterfeit responses (replies not originating from genuine HEIs), incomplete responses, and double/multiple replies.

The final number of institutions that took part in the survey is therefore 722. The validated responses are those that have been analysed in the current report. Multiple rounds of consultation with the Advisory Committee contributed to the improvement and the development of the final version of this report.



# Summary of the main results

## Survey sample and profile of the responding institutions

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### *Number and regional distribution of replies*

- 722 HEIs from 110 countries and territories replied to the survey.
- In terms of percentage of replies, Europe and Latin America & the Caribbean are clearly overrepresented, North Africa & the Middle East is slightly overrepresented, while North America and especially Asia & Pacific are underrepresented. Sub-Saharan Africa is in line with the distribution of its HEIs in the WHED.

### *Language distribution of replies*

- The majority of HEIs (65%) replied to the survey in English, but the percentage of HEIs that replied in Spanish is also significant (26%). In comparison to the 5<sup>th</sup> IAU Global Survey, the percentage of HEIs that replied in French (9%) has substantially decreased. Translation of the survey into Spanish clearly helped with data collection from Latin America & the Caribbean.

### *Position of the respondents*

- More than 50% of respondents are administrators in the international office and 25% form part of the academic leadership.

### *Units/individuals inside the institution consulted to reply to the questionnaire*

- The consultation process within institutions around the world is diverse. However, it is clear that this happened mainly between the international office and academic leadership (heads and deputy heads of institutions) and that it rarely included other units/individuals. This result is symptomatic of a top-down approach to internationalization, which bears some risks on the involvement and ownership by the whole academic community.

### *Institutional profiles*

- Typical profile of institutions from which replies were received: medium-small public institutions, more or less focused equally on both teaching and research and offering all three-degree types (Bachelor, Master, Doctorate).

### *Language usage as a medium of instruction across institutions*

- The overall majority of respondents (81%) report one official language as the primary medium of instruction at their respective institutions. Only in some cases did they report two or even three.
- When bi- or even trilingualism is present, it is often due to the country having more than one official language and institutions adopt these official languages as a medium of instruction.

- It is interesting to point out the role of English, which at some institutions, although only a minority, takes precedence as the primary medium of instruction even if it is not one of the official languages of the country.

## Part A. Importance, benefits and challenges to internationalization

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### *Importance of internationalization*

- The level of importance of internationalization is high at the majority of HEIs (77%) and it has increased over the last five years across all types of HEIs, including those where the level of importance was and still is low. Contrary to what was shown in the 5<sup>th</sup> edition of the survey, this trend might help reduce inequalities between HEIs as internationalization may become important at all HEIs, even at those where it was not previously.
- The primary driver for the increase in the importance of internationalization at the global level is clearly the “Increased need to strategically connect with other HEIs globally”, underlying the strategic nature of internationalization as an intentional process undertaken by HEIs.

### *Drivers of internationalization*

- Institutional leadership and the international office are identified as the main internal drivers for internationalization.
- At the global level, it is difficult to identify the most important external drivers for internationalization as several were selected by similar percentages of HEIs (“Demand from foreign higher education institutions”, “National and international rankings”, “Global policies/agenda (including the UN Agenda)”, “Government policy (national/state/province/municipal)” and “Business and industry demand”). However, at the regional level there are interesting findings: “Demand from foreign higher education institutions” is the most important driver in Europe and Latin America & the Caribbean, even if by small margins, while “National and international rankings” is the most common driver, clearly in North Africa & the Middle East and Sub-Saharan Africa, and also in Asia & Pacific, but by a small margin. Finally, “Business and industry demand” is the top driver in North America.

### *Benefits of internationalization*

- “Enhanced international cooperation and capacity building” remains the most important benefit of internationalization at global level and in all regions except North America, as was the case in the 5<sup>th</sup> Global Survey. “Increased global, international and intercultural knowledge, skills and competences for both students and staff” is the second most important benefit at global level and the first in North America.

### *Risks of internationalization*

- There is no common institutional risk for HEIs at global level, but a variety of risks (e.g. “Increased workload for academic and administrative staff”, “Difficulty to combine/integrate it with other institutional priorities (e.g. diversity, equity, and inclusion and sustainable development)”), do have differing levels of importance at distinct HEIs.

Europe and North America are the only two regions where one clear institutional risk (Increased workload for academic and administrative staff) emerges as the most important.

- Likewise for societal risks, no overall risk emerged as being common to the majority of HEIs, depicting a very diverse landscape of societal risks around the world. However, regional analysis reveals that “Brain drain” is clearly the most important risk in Sub-Saharan Africa, where it was selected by three quarters of HEIs.

### *Obstacles/challenges to internationalization*

- “Insufficient financial resources” is clearly the main internal obstacle to internationalization at global level and in all regions but North America, where it is second to “Competing priorities at institutional level”.
- “Limited funding to support internationalization efforts/to promote our institution internationally” is the most common external obstacle/challenge to internationalization at global level and in all regions but North America, where it is still common to the majority of HEIs and second to “Visa restrictions imposed by our country on foreign students, researchers and academics”.

## **Part B. Internationalization governance**

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### *Policy/strategy for internationalization*

- Over three-quarters of respondents (77%) have elaborated a strategy for internationalization.
- Europe has the highest percentage of HEIs indicating the presence of a policy/strategy (85%), and results for Europe are in line with earlier ones from the EUA Trends reports. Sub-Saharan Africa has the lowest percentage of HEIs indicating the presence of a policy/strategy (61%), with a substantial portion of HEIs in the latter (28%) in the process of preparing it.

### *Status of the policy/strategy*

- 42% of respondents recently revised or issued their policy/strategy for internationalization, with an additional 29% currently undergoing revision, 19% stated that the policy/strategy is scheduled for future revisions, while only 10% reported no recent or anticipated changes.

### *COVID-19 crisis impact on the policy/strategy revision*

- The vast majority (71%) of HEIs indicated that the revision of their internationalization strategy was not due to the COVID-19 crisis.
- There are some interesting regional differences: 46% of HEIs in Asia & Pacific reported that the policy/strategy revision was due to COVID-19 but only 15% did so in North America.

### *Internationalization policy/strategy and activities*

- The policy/strategy for internationalization is institution wide in almost all HEIs that indicated having elaborated such a policy/strategy.

- A significant majority of HEIs (92%) have established dedicated offices or teams to oversee effective implementation of the policy/strategy.
- An international dimension is included in other institutional policies/strategies/plans at 83% of HEIs.
- 79% of the HEIs have defined clear targets and benchmarks to guide their progress within the policy/strategy.
- The policy/strategy/plan is in line with the national internationalization strategy (if one exists) at 77% of HEIs. Considering that the remaining 23% might not have a national internationalization strategy, this results in a very good alignment.
- A monitoring and evaluation framework to assess progress is present at 74% of HEIs.
- Slightly more than half of HEIs (54%) have allocated specific budgetary provisions for the implementation of their policy/strategy.
- The active involvement of students (student organisations and/or student representatives) is present at almost half of HEIs (48%).
- Only 36% of faculties/schools/departments have developed their own internationalization policies/strategies.
- At regional level, results are similar to those at global level, but with some variations, for instance, in Europe where involvement of students (student organisations and/or student representatives) in the design, evaluation, and implementation of the policy/strategy/plan is common (at 63% of HEIs), while in all other regions and particularly in North Africa & the Middle East (37%) and Latin America & the Caribbean (30%) it is not.
- Comparison with previous survey results reveals an increasing trend in the presence of a policy/strategy and dedicated offices or teams to oversee effective implementation of the policy/strategy, a stabilising trend for the presence of a monitoring framework and a decreasing trend for the presence of a dedicated budget.

### *Geographic priorities for internationalization*

- Globally, the majority of HEIs (59%) have geographic priorities for internationalization.
- At regional level there are some differences: in Sub-Saharan Africa, less than half of HEIs have geographic priorities (44%), in Asia & Pacific half of HEIs have them, while in all other regions the majority of HEIs have them with the highest percentage in North America (65%).
- Europe stands out as the most important region for internationalization, with 75% of respondents considering it “very important”.
- A clear regionalization trend emerges in Asia & Pacific, Latin America & the Caribbean and especially Europe where 90% of HEIs consider their own region “very important”. Regionalization is important also in Sub-Saharan Africa where HEIs consider their own region second in importance only to Europe.
- With the exception of intra-regional collaboration, Latin America & the Caribbean, North Africa & the Middle East and Sub-Saharan Africa are always considered the least important by all other regions and particularly by each other. All these regions are considered part of the “Global South” and the results show how inter-regional “South-South” collaboration is definitely not considered a priority.

### *Importance of funding sources for international activities*

- The general institutional budget is the main funding source in all regions, chosen by more than 60% of HEIs in all regions and as much as 74% of HEIs in Latin America & the Caribbean.
- Sub-Saharan Africa is the only region where other two sources (“International organisations (World Bank, European Union, ASEAN, etc.)” and “Foreign governments

(bilateral cooperation and aid and development)”) are considered “very important” by the majority of HEIs (56% and 51% respectively).

### *Recruitment and promotion policies*

- At the majority of HEIs, international experience is either considered an asset or not at all both for academic (57%) and administrative staff (68%). It is a requirement only for a tiny minority.
- Almost half of HEIs indicated that knowledge of at least one foreign language is at least partly required for recruitment and promotion of academic staff. This percentage is much lower for administrative staff.
- The regional analysis reveals interesting differences among regions, both for international experience and knowledge of at least one foreign language, and for academic and administrative staff.
- North Africa & the Middle East, followed by Europe and Asia & Pacific are the regions valuing most both international experience and knowledge of at least one foreign language for both academic and administrative staff. On the contrary, North America is the region that values these categories the least, both for academic and administrative staff.

### *Priority of internationalization activities*

- No one stood out as being chosen by a majority of HEIs, showing that there is no overall common priority activity around the world; activities that are prioritised may be determined by differing contexts
- Among these activities, “Outgoing credit-seeking student mobility (student exchanges)” was identified as the most common internationalization activity, with 44% of HEIs selecting it as one of their priorities. Following closely, “International research collaboration and outputs (e.g., international co-publications)” was considered a priority by 39% of HEIs.
- Comparison with previous global survey results reveals that these two activities have remained the most important over time.
- In some regions there is clearly one activity which is chosen by the majority of respondents as the most important. This is the case in North America, where “Incoming degree-seeking student mobility (recruitment of international students)” is chosen as the most important activity by a striking 74% of HEIs. It is also the case in Latin America & the Caribbean where 65% of HEIs chose “Outgoing credit-seeking student mobility (student exchanges)” as the most important, and in Sub-Saharan Africa where 65% of HEIs choose “International research collaboration and outputs” as the most important.

### *Change in importance of internationalization activities in the last five years*

- “International development and capacity building projects” saw the most substantial increase in importance, noted by 63% of respondents. This is interesting, as respondents to the 6<sup>th</sup> Global Survey identify “Enhanced international cooperation and capacity building” as the top expected benefit of internationalization. “International development and capacity building projects” is not one of the priority activities, but it is the one that has increased the most in importance over the last five years. This means that even if at present there is still a discrepancy between prioritised activities and expected benefits, there is a movement towards convergence.
- There is a degree of subjectivity when it comes to the position of respondents but the differences are not huge and overall “International development and capacity building projects”, “International research collaboration and outputs (e.g. international co-publications)” and “Outgoing mobility opportunities/learning experiences for students

- (study abroad, international internships and placements, etc.)” are the activities that have increased in importance the most.
- “International development and capacity building projects” is the activity that has increased the most in importance at private HEIs and regionally in North Africa & the Middle East and Asia & Pacific.
  - “International research collaboration and outputs (e.g. international co-publications)” is the activity that has increased the most in importance at public HEIs and regionally in Sub-Saharan Africa.
  - “Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.)” is the activity that has grown in importance the most in Europe, Latin America & the Caribbean and North America.

### *Changes in international partnerships in the last five years*

- The number of international partnerships in the last five years has increased at the majority of HEIs in all regions of the world, from 62% of HEIs in Latin America & the Caribbean to 79% in Asia & Pacific.

### *The impact of COVID-19 on international partnerships*

- Globally, half the respondents (50%) indicated that changes in international partnerships were not primarily a result of the COVID-19 crisis. On the other hand, 34% believed that the crisis had influenced changes to some extent, 11% perceived a large extent of influence stemming from the crisis, while only 5% asserted that the changes were definitely a consequence of the crisis.
- Private HEIs have been affected more than public HEIs by the COVID-19 crisis when it comes to the change in the number of international partnerships, as 56% of them report that changes in international partnerships were due to COVID-19 while only 46% of public report this.
- Latin America & the Caribbean is the region reporting the greatest impact of COVID-19, with 67% of HEIs reporting that the changes in the number of international partnerships were due to COVID-19, although the majority of them (43%) reported that changes were due to COVID-19 only to some extent. In Sub-Saharan Africa, 56% of respondents indicated that changes in international partnerships were a result of the COVID-19 crisis and it is in this region that the highest percentage of HEIs reported that the changes were definitely a consequence of the crisis (13%).

## **Part C. Internationalization of teaching and learning: activities**

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### *Collaborative degree programmes*

- The majority of HEIs at global level (63%) offer either joint degree programmes, or dual/double and multiple degree programmes, or both types of programmes with international partners. Collaborative degrees are more common at public than at private HEIs (67% vs. 57%). However, at regional level there are substantial differences with 88% of HEIs offering them in North America but only 49% of HEIs in Latin America & the Caribbean.
- The majority of HEIs offer dual/double and multiple degree programmes (56%), while almost half (49%) offer joint degree programmes.

- More public than private HEIs offer both joint degrees (52% vs. 45% of all respondents) and dual/double and multiple degrees (60% vs. 49% of all respondents).

### *Changes in collaborative degree programmes in the last five years*

- For both types of collaborative degrees, half or slightly more than half of HEIs reported an increase in numbers, while the others reported stability. Very few HEIs reported a decline in numbers.
- Higher percentages of public HEIs are reporting an increase in the number of collaborative degrees.
- Asia & Pacific distinguish itself as the only region where the majority of HEIs reported stability in collaborative degrees, both for joint and dual/double and multiple degree programmes. In all other regions dual/double and multiple degree programmes increased in numbers at the biggest group of HEIs, while for joint degree programmes this is true only in North Africa & the Middle East, Sub-Saharan Africa and Europe.

### *Impact of online collaboration on collaborative degree programmes*

- About half of respondents offering collaborative degrees indicated that the introduction or increase of online collaboration has influenced collaborative degrees.
- Online collaboration had an impact on collaborative degrees at the majority of private HEIs (57%) but not at public ones (46%).
- At regional level, two groups of regions emerge: in the first group, composed of Europe and North America, the majority of respondents reported no significant impact from online collaboration on collaborative degree; in the second group, composed of all other regions, the opposite is true.

### *Consequences of the increase in online collaboration on collaborative degree programmes*

- Globally, the increase in online collaboration has introduced several challenges and changes for academic institutions, with the most common being that this increase has presented challenges for academic staff in adopting new teaching methods.
- At regional level, the above-mentioned conclusion is true in all regions except North America. In North America the majority of HEIs indicated that the increase in online collaboration has led to the inclusion of a new online component to existing joint degree programmes with international partners, this is true also in Asia & Pacific, North Africa & the Middle East and Sub-Saharan Africa, but not in Europe and Latin America & the Caribbean.

### *Transnational education (TNE)*

- Only 27% respondents reported that their institution is involved in transnational education (TNE), adding that the adoption of such an internationalization practice at global level is not yet widespread.
- Overall, the adoption of TNE by region shows varying rates but, similar to the global context, remains relatively limited across all regions.

### *Types of transnational education (TNE)*

- Among institutions engaged in TNE, Articulation Programs and Joint Universities are the most common, while Franchise Programs and International Branch Campuses are the least common. Nonetheless, all types of TNE showed an increased importance at global level.

- Private and public HEIs show a similar pattern, with Articulation Programs and Joint Universities more common than Franchise Programs and International Branch Campus. However, for private HEIs all types of TNE have increased in importance at the majority of HEIs that have them, while for public HEIs only the importance of Articulation Programs and Joint Universities has grown over the past five years, while for Franchise Programs and International Branch Campus it has not changed.

### *The role of COVID-19 on the changes in different TNE types*

- Globally, respondents split in two, with almost half of HEIs reporting that changes in different TNE types were due to COVID-19.
- Private HEIs have been affected more by COVID-19 than public HEIs when it comes to TNE.
- The influence of the COVID-19 crisis on TNE involvement exhibits strong regional variations. Notably, North Africa & the Middle East and Latin America & the Caribbean have emerged as the regions most impacted by the crisis. Conversely, North America stands out as the region with the least impact, followed by Sub-Saharan Africa, and subsequently Europe.

### *Virtual internationalization*

- Globally, a substantial majority (77%) of respondents affirm their institutions' engagement with virtual internationalization opportunities.
- Globally, the majority of all HEIs that replied to the survey offer virtual exchanges (69%), COIL (60%) and online preparatory courses (56%), but not MOOCs (46%) and online degree programmes offered by institution to students in other countries (45%).
- At regional level, the majority of HEIs engage in virtual internationalization in all regions, but with some differences, from 58% in North Africa & the Middle East to almost all HEIs in Latin America & the Caribbean (91%).
- Virtual exchanges are the most common activity in all regions, offered by a minimum of 53% of HEIs in North America to a maximum of 84% of HEIs in Latin America & the Caribbean.

### *Change in importance of virtual internationalization opportunities over the past five years*

- At global level, all activities also increased in importance over the past five years with virtual exchanges being the activity that increased in importance at the highest percentage of HEIs (80%).
- At regional level, online preparatory courses (language training, etc.) offered by the institution to students in other countries, Collaborative Online International Learning (COIL) and virtual exchanges have increased in importance at the majority of HEIs in all regions.

### *The role of COVID-19 on changes in importance of virtual internationalization opportunities*

- Globally, a substantial majority of participants (87%) indicated that changes in importance of virtual internationalization opportunities and COVID-19 are linked to different degrees.
- In all regions the majority of HEIs reported that changes in importance of virtual internationalization opportunities and COVID-19 are linked to different degrees, with Latin America & the Caribbean being the region with the highest percentage of HEIs reporting a link between COVID-19 and changes in importance of virtual



internationalization opportunities, with 24% of HEIs indicating that changes were definitely due to COVID-19, and as many as 45% reporting that changes were due to COVID-19 to a large extent.

## Part D. Internationalization of teaching and learning: internationalization of the curriculum at home

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### *Change in importance of internationalization of the curriculum at home over the past five years*

- 75% of respondents acknowledged a noticeable increase in the importance of internationalizing the curriculum at home within their institution over the past five years.
- Across all regions, a predominant majority of respondents indicated an increase in the importance of internationalizing the curriculum at home with a noticeable emphasis on somewhat increased significance.

### *Change in importance of ways to internationalize curriculum over the last five years*

- “Online activities that develop international perspectives of students at home” which encompassed practices such as virtual exchanges, COIL, online collaborative international projects, and virtual international internships, is the activity that increased in importance at most HEIs in all regions of the world;
- There are some interesting regional differences - while in North America the focus is mainly on “Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL, online collaborative international projects; virtual international internships, etc.)”, in all other regions there is a broader spectrum of activities that HEIs consider tools for internationalization of the curriculum at home.

### *Institution-wide international, intercultural or global learning outcomes or graduate capabilities*

- Slightly over half of respondents (51%) reported having defined international, intercultural or global learning outcomes or graduate capabilities.
- International, intercultural or global learning outcomes or graduate capabilities are more common at private HEIs (61%) than at public ones (44%) and the approach taken by private and public HEIs is different, more centralised at the institutional level for private HEIs and more devolved to faculty level for public ones.
- The regional analysis underscores the diverse approaches and priorities that institutions adopt in integrating international, intercultural or global competencies into their graduates’ learning experiences. Asia & Pacific and North Africa & the Middle East come out as the most advanced regions in terms of defining learning outcomes, but with different approaches, at the institutional or national levels. On the contrary, North America is the region with the least development of such learning outcomes.
- The results of the 6<sup>th</sup> Global Survey indicate progress with respect to the definition of learning outcomes related to international, intercultural or global competencies of graduates, as the percentage of HEIs having defined them grew to 51% from 38% at the times of the 5<sup>th</sup> Global Survey.

## *Change in importance of extra-curricular activities over the last five years*

- “Interaction with students in other countries using virtual internationalization”, “Events that provide inter-cultural/international experiences on campus or in the local community” and “Intercultural skills-building workshops for staff and students” are the activities that have increased in importance over the last five years at the majority of HEIs in all regions of the world.

## **Part E. Internationalization of research**

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### *Teaching/research-focused institutions*

- The majority of respondents (65%) come from institutions that focus more or less equally on both teaching and research.
- Private HEIs that replied to the survey are more teaching-oriented than public HEIs.
- Despite the fact that the majority of respondents in all regions come from institutions that focus more or less equally on both teaching and research, there are regional differences when it comes to the percentage of predominantly teaching-oriented HEIs with Latin America & the Caribbean being the region with the highest percentage of predominantly teaching-focused institutions (42%) and Sub-Saharan Africa the one with the least (9%).

### *Involvement in international research*

- There are substantial differences in the approach to internationalization of research depending on the teaching/research focus of HEIs.
- Public HEIs are more involved in international research than private ones.
- HEIs involved in a range of disciplinary and/or multidisciplinary international research; projects and collaborations is the biggest group in all regions except Sub-Saharan Africa.
- In Sub-Saharan Africa more than half of HEIs (56%) have very little international research and it is mainly conducted by individual researchers.
- The current edition of the survey identifies a rise in institutions engaged in a wide spectrum of disciplinary and/or multidisciplinary international research projects and collaborations, with 31% reporting such involvement, compared to 24% in the 5<sup>th</sup> edition.

### *Main sources of funding for international research*

- The three main sources of funding for international research are: grants from international organisations and foreign funding governmental agencies, grants from national governmental agencies and the institution's own resources.
- The teaching/research focus of HEIs seems to impact mainly on the capacity to obtain grants from national or international agencies, with predominantly research-focused HEIs in a more favourable position than predominantly teaching-focused HEIs, which have to rely more on the use of the institution's own resources.
- Public HEIs have a higher capacity in attracting grants from national and international agencies compared to private HEIs, which are almost obliged to rely on their own resources to conduct international research.
- There are substantial differences between different world regions in terms of the main sources of funding for international research, varying from grants from national governmental agencies in Europe and North America, to institutional own resources in all other regions.

- The comparison with the results of the 5<sup>th</sup> Global Survey suggests that access to grants from international organisations and foreign funding governmental agencies has decreased, especially in Sub-Saharan Africa and as consequence HEIs have to rely more on their own institutional funding to conduct international research.

### *Effect of changes in political relations between countries on internationalization of research*

- Only in Europe (58%) and North America (60%) did the majority of HEIs report an effect from changes in political relations between countries on internationalization of research.
- Caution should be used in interpreting the results of this question as the analysis of replies reveals that, unfortunately, there is a level of inconsistency in the way HEIs have replied to the question.

## **Part F. Internationalization and societal/ community engagement**

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### *Link between internationalization and societal/community engagement*

- The majority of respondents (60%) indicated that there is an explicit link between internationalization and societal/community engagement at their institutions. However, only 22% conduct any assessment proving that activities are a means to benefit the local community.
- Asia & Pacific is the region where the highest percentage of HEIs (69%) indicated that there is an explicit link between internationalization and societal/community engagement. However, the highest percentage of HEIs that also conduct assessment proving this is found in Sub-Saharan Africa (30%).

### *Ways of linkage between internationalization and societal/community engagement*

- HEIs are using many ways to link internationalization and societal/community engagement, the most common ones being the organisation of events involving international speakers from other countries, the institution's commitment to regional and neighbouring areas and the active development and promotion of international development cooperation.
- Overall, activities that are common are common in all regions, but there are some exceptions, for instance "Teachers and researchers are encouraged to provide services or carry out other community engagement activities with foreign partners" is the most common activity in Sub-Saharan Africa, but not so much in the other regions.

### *Internationalization impact on intercultural understanding and racism/xenophobia*

- The majority of respondents (84%) indicated that internationalization has played a positive role in promoting intercultural understanding and reducing racism and xenophobia not only within their institutions but also in the local community.
- Despite some minor differences, the regional results confirm the overall positive impact of internationalization on promoting intercultural understanding and reducing racism and xenophobia in all regions of the world.

## Part G. Emerging issues and the future of internationalization

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### *Institutional policies/measures for refugees and migrants*

- Just under half of HEIs (46%) indicated that they had implemented special policies or measures in the last five years to accommodate the increasing numbers of refugees and migrants seeking enrolment in higher education. Such measures are more common at public than private HEIs.
- Europe stands out as the region with the highest percentage of institutions that have adopted such measures/policies, followed by North Africa & the Middle East. These two are the only regions where the majority of HEIs have policies/measures in place for refugees and migrants.
- Only 30% of HEIs in Sub-Saharan Africa and 21% in Asia & Pacific have adopted measures to support refugees, even though, according to UNHCR, they are, respectively, the first and third host region by number of refugees.

### *Main policies/measure adopted*

- Two-thirds (63%) of HEIs that have special policies or measures in place to support refugees/migrants indicated taking direct action that support refugee/migrant students, academic, and administrative staff as a prominent policy or measure adopted by their institutions. The only other activity that is common at the majority of HEIs is the creation of scholarships/grants for refugee students, academic, and administrative staff (53%).
- The most common policies/measures adopted by public and private HEIs are different. Public HEIs are more oriented toward direct actions that support refugee/migrant students, academic, and administrative staff, offer specific support to refugees/migrants, and host academic, researchers, or administrative staff with a refugee background. Private HEIs are more oriented towards working with NGOs and civil society groups to facilitate refugee/migrant integration.
- The number of replies in some regions is low and therefore the regional analysis must be interpreted with care, but it does show some variability in terms of measures implemented between different regions.

### *Link between internationalization and sustainable development*

- The majority of HEIs (59%) link internationalization and sustainable development beyond climate action.
- More public HEIs are linking internationalization and sustainable development than private HEIs.
- Asia & Pacific is clearly the region where the link between internationalization and sustainable development is more advanced, as 52% of institutions in that region indicated that they have a policy or strategy in place to use internationalization as a means to support sustainable development.
- North America is the only region where the percentage of HEIs linking internationalization and sustainable development is less than 50%.

### *Internationalization and diversity, equity and inclusion*

- The overall majority of institutions (87%) confirmed that their internationalization policies and activities take into account diversity, equity and inclusion.

- The target group for equity and inclusion varies according to region: “People from low economic backgrounds” is the priority target group in Latin America & the Caribbean, Asia & Pacific and Sub-Saharan Africa; “People with disabilities”, in Europe and in North Africa & the Middle East and “Ethnic/cultural minorities” in North America.

### *Expected future challenges to recruit international degree-seeking students*

- Lack of financial support emerged as the most prominent challenge, the only one common to a majority of respondents (56%).
- Lack of financial support is the most important challenge identified by all regions except North Africa & the Middle East. In this region, along with Europe, there is no single common challenge identified by respondents, which depicts a very varied landscape of challenges faced.

### *Future priorities for internationalization*

- There is no common future priority at the global level.
- While in Asia & Pacific and Europe, there is no common future priority for the majority of HEIs, in all other regions there is at least one.
- “Academic staff training in international, intercultural and global competencies” is the most pressing future priority in Sub-Saharan Africa and North Africa & the Middle East, and to a lesser extent also in Latin America & the Caribbean, where the majority of HEIs also identify another future priority as “Internationalization and interculturalization of the curriculum at home for all students”. In North America, “Increasing the number of incoming degree-seeking international students” is the most pressing future priority.

# SURVEY SAMPLE AND PROFILE OF THE RESPONDING INSTITUTIONS

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# SURVEY SAMPLE AND PROFILE OF THE RESPONDING INSTITUTIONS

This part summarises the characteristics of the samples, such as the number and regional distribution of replies, the language in which respondents replied, their position within the institution and the units and/or individuals in the institution they consulted in order to reply to the questionnaire. The main data are reported below.

## Main data

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### *Number and regional distribution of replies*

- 722 HEIs from 110 countries and territories replied to the survey.
- In terms of percentage of replies, Europe and Latin America & the Caribbean are clearly overrepresented, North Africa & the Middle East is slightly overrepresented, while North America and especially Asia & Pacific are underrepresented. Sub-Saharan Africa is in line with the distribution of its HEIs in the WHED.

### *Language distribution of replies*

- The majority of HEIs (65%) replied to the survey in English, but the percentage of HEIs that replied in Spanish is also significant (26%). In comparison to the 5<sup>th</sup> IAU Global Survey, the percentage of HEIs that replied in French (9%) has substantially decreased. Translation of the survey into Spanish clearly helped with data collection from Latin America & the Caribbean.

### *Position of the respondents*

- More than 50% of respondents are administrators in the international office and 25% form part of the academic leadership.

### *Units/individuals inside the institution consulted to reply to the questionnaire*

- The consultation process inside institutions around the world is diverse. However, it is clear that it happened mainly between the international office and the academic leadership (heads and deputy heads of institutions) and that rarely it included other units/individuals. This result is symptomatic of a top-down approach to internationalization, which bears some risks of involvement and ownership by the whole academic community.

### *Institutional profiles*

- Typical profile of institutions from which replies were received: medium-small public institutions, more or less focused equally on both teaching and research and offering all three-degree types (Bachelor, Master, Doctorate).

## Language usage as a medium of instruction across institutions

- The overall majority of respondents (81%) report one official language as the primary medium of instruction at their respective institutions. Only in some cases did they report two or even three.
- When bi- or even trilingualism is present, it is often due to the country having more than one official language and institutions adopt these official languages as a medium of instruction.
- It is interesting to point out the role of English, which at some institutions, although only a minority, takes precedence as the primary medium of instruction even if it is not one of the official languages of the country.

## Introduction, number and regional distribution of replies

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As mentioned above the survey collected unique replies from 722 HEIs around the world.

### Regional distribution

Respondents were spread over 110 countries and territories<sup>1</sup>.

HEIs were asked to identify their country or territory from a predefined list.

IAU divided the countries into six regions for the 6<sup>th</sup> edition, following the pattern of the 4<sup>th</sup> and 5<sup>th</sup> Global Surveys. However, in this edition, Africa was divided into two regions: Sub-Saharan Africa and North Africa, with the latter combined with the Middle East. The remaining regions remained unchanged. The new regional divisions are as follows:

1. Asia & Pacific
2. Europe<sup>2</sup>
3. Latin America & the Caribbean
4. Sub-Saharan Africa
5. North Africa & the Middle East<sup>3</sup>
6. North America<sup>4</sup>

The list of countries and their distribution into the six different regions is shown in Annex 4.

The regional distribution of HEIs is the following: 281 respondents come from Europe (39%), 224 from Latin America & the Caribbean (31%), 69 from North Africa & the Middle East (9%), 62 respondents come from Asia & Pacific (9%), 43 from Sub-Saharan Africa (6%) and 43 from North America (6%) (Figure 1).

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1. 108 United Nations (UN) member states, one UN non-member state (Palestine) and one special administrative region of People's Republic of China (Macao).

2. Europe includes all member states of the Council of Europe plus Belarus and the Russian Federation.

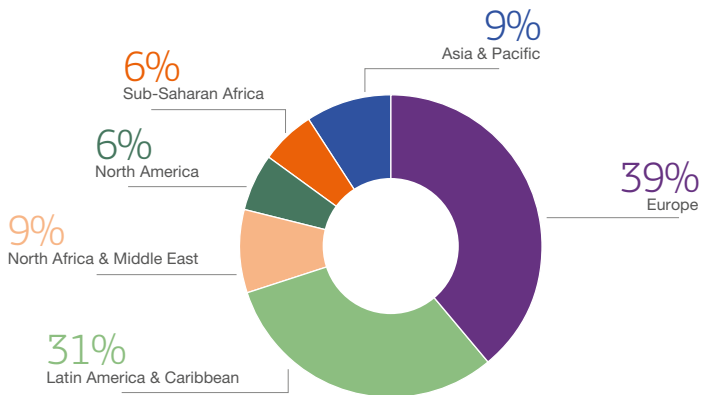
3. For this survey, Mauritania has been included in North Africa and not in Sub-Saharan Africa.

4. North America includes only two countries: Canada and the United States of America, Mexico is included in Latin America & the Caribbean.



**Figure 1**

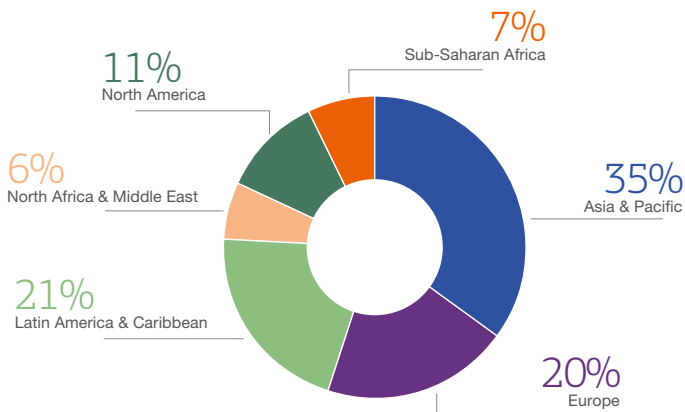
Regional distribution of replies



This can be compared to the distribution of the 20 903 HEIs in the IAU's World Higher Education Database - WHED 5 (Figure 2).

**Figure 2**

Regional distribution of HEIs in IAU WHED



Comparing the two figures, it is clear that HEIs from Asia & Pacific and from North America are underrepresented in the survey, while HEIs from Europe and Latin America & the Caribbean are overrepresented; HEIs from North Africa & the Middle East are slightly overrepresented, while Sub-Saharan Africa is in line with the distribution of its HEIs in the WHED.

5. The IAU's World Higher Education Database (WHED) portal is the International Association of Universities' unique online reference tool that provides comprehensive and detailed information on Higher Education Systems and Credentials (in 196 countries) and Institutions (almost 21 000) around the world. <https://whed.net/home.php> (accessed July 2023). It was used to create the mailing list for the survey.

## Comparison with the 4<sup>th</sup> and 5<sup>th</sup> IAU Global Survey

The number of replies collected in the 6<sup>th</sup> IAU Global Survey is lower in comparison to the previous editions conducted in 2015 (5<sup>th</sup> IAU Global Survey, 907 institutions from 126 countries) and in 2013 (4<sup>th</sup> IAU Global Survey, 1 336 institutions from 131 countries).

Compared to the 5<sup>th</sup> edition, the decline in responses is evident across all regions. The most notable decline is seen in Asia & Pacific, where the number of respondents almost halved from 115 to 62. Europe decreased from 330 to 281 respondents, Latin America & the Caribbean experienced a decrease from 264 to 224, and North America decreased from 53 to 43. When we combine Africa & the Middle East, the 6<sup>th</sup> edition also shows a decrease from 145 responses to 112.

Country-wise, the drops when comparing the 6<sup>th</sup> to the 5<sup>th</sup> Global Survey are relatively small when we compare the drops from the 5<sup>th</sup> to the 4<sup>th</sup> edition. However, significant decreases in the number of respondents are still observed in Brazil (from 56 to 18), Mexico (from 115 to 81), and Spain (from 44 to 12). However, these three countries are those that experienced a large increase in the number of replies from the 4<sup>th</sup> to the 5<sup>th</sup> edition. This seems to indicate very good uptake of the survey in these countries for the 5<sup>th</sup> edition, but which was not reproduced in the 6<sup>th</sup> edition.

Other countries where the survey experienced a significant decline are reported in [Table 1](#):

**Table 1**

Country	Difference 5 <sup>th</sup> – 6 <sup>th</sup> Global Survey	Decline in the number of replies
Colombia	-19	from 52 to 33
Viet Nam	-18	from 19 to only 1
United States of America	-13	from 41 to 28
Romania	-13	from 19 to 6
Japan	-10	from 13 to only 3
Russian Federation	-10	from 13 to only 3
India	-10	from 26 to 16

Among these countries it is interesting to mention two groups: those which experienced a decline in the 6<sup>th</sup> edition after an increase from the 4<sup>th</sup> to the 5<sup>th</sup> (Colombia and Viet Nam) and those which have experienced a continuous decline from the 4<sup>th</sup> to the 5<sup>th</sup> and from the 5<sup>th</sup> to the 6<sup>th</sup> (Russian Federation and United States of America).

It is difficult to identify the causes of declining replies, or of those specific to a region or a country. The causes may be multiple and may differ from country to country.

The most probable explanation is that HEIs, though aware of the survey, are often solicited to reply to surveys by their national governments and other organisations and this might lead to “survey fatigue”.

The overall distribution is similar to that of the 5<sup>th</sup> Global Survey, even if overrepresentation of Latin America & the Caribbean and Europe is even more pronounced in the 6<sup>th</sup> edition, as these two regions represent 70% of all replies while they make up only 41% of HEIs in the WHED.

As stated above, the survey had a significant drop in the number of replies across all regions, particularly in Asia & Pacific (from 115 to 62). However, the reply rate did increase in certain countries in several regions – most notably in Azerbaijan (from 5 to 26).

Countries where there was a substantial increase in the number of replies are reported in Table 2:

**Table 2**

Country	Difference 5 <sup>th</sup> – 6 <sup>th</sup> Global Survey	Increase in the number of replies
Azerbaijan	+21	from 5 to 26
Iraq	+13	from 6 to 19
Finland	+8	from 4 to 12
Oman	+8	from 0 to 8
Greece	+7	from 1 to 8
Nigeria	+7	from 9 to 16
Philippines	+7	from 3 to 10

The increased number of replies in some of the above-mentioned countries (i.e. Azerbaijan and Nigeria) could be explained by active promotion carried out by members of the IAU Administrative Board in the respective countries.

## Response rate

No clear response rate for the survey can be calculated, and we explain the reasons for this below.

Initially, the survey was distributed via email to all HEIs having an email address listed in IAU's World Higher Education Database – (WHED).

The total number of HEIs listed in the WHED when the survey was launched was 20 903. However, we cannot use this as the total number of institutions contacted for the reasons below:

1. The number of HEIs in the WHED with an email address was not constant during the months the survey was open; it increased as more addresses were added due to on-going updates by IAU;
2. IAU was able to track email addresses that worked – the delivery rate was 98%, the opening rate was on average 30% and the click rate on average 7% for the various email campaigns.
3. The survey was distributed not only via email to WHED contacts, but also by partner organisations that used their own contact lists and promoted the survey online through social media such as Twitter and LinkedIn. The IAU also promoted the survey through its official website and the same social media channels as the partner organisations. Three

different links to reply to the survey were created and tracked; the final distribution of replies for these channels is as follows: social media and website 258 replies, Partners 235 and Email campaigns 229.

## Statistical significance

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In order to take meaningful conclusions from results, it is important to check that the sample size of the 6<sup>th</sup> IAU Global Survey has statistical significance, i.e. to which extent the respondents to the 6<sup>th</sup> IAU Global Survey are representative of the overall distribution of HEIs in the WHED, in one specific region and in one specific country.

Without entering into too much statistical details, there are two important concepts to introduce: margin of error and level of confidence.

The margin of error reflects how much the answers from the respondents reflect the views of the population.

For example, the result of one question might show that X% of respondents reply Y. A 5% margin of error would add 5% on either side of this percentage X, meaning that in reality a percentage of between X-5% and X+5% of respondents would reply Y.

The maximum margin of error which is usually used is 10%.

The confidence level measures the importance of the sample selection in the results. In other words, if the survey were to be repeated with X more samples randomly selected from the overall population, how often would the results obtained in one sample significantly differ from those obtained using the other X samples? A 95% confidence level means that the same results will be reproduced 95% of the time.

The minimum margin of error which is usually used is 80%.

The statistical significance of a sample size (the number of replies collected) at a certain margin of error and with a certain confidence level depends on the sample size itself and the population size.

There is a mathematical formula that allows us to calculate the statistical significance of the sample size (the number of replies) of a survey.<sup>6</sup>

Considering the size of the population (20 903 HEIs in the WHED), the number of replies at the global level is large enough to be statistically significant, with a 5% margin of error at a 99% confidence level.

Therefore, the respondents to the 6<sup>th</sup> IAU Global Survey offer a highly representative sample of the overall population of HEIs at the global level.

On the other hand, at the regional level, the statistical significance varies across the six regions:

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6. <https://www.surveymonkey.com/mp/sample-size/> / [https://www.surveymonkey.com/mp/sample-size-calculator/?utm\\_source=help\\_center&utm\\_expid=cOMQLyyUQhqbVct5bsJIAA0&utm\\_referrer=https%3A%2F%2Fhelp.surveymonkey.com%2Farticles%2Fen\\_US%2Fkb%2FHow-many-respondents-do-I-need](https://www.surveymonkey.com/mp/sample-size-calculator/?utm_source=help_center&utm_expid=cOMQLyyUQhqbVct5bsJIAA0&utm_referrer=https%3A%2F%2Fhelp.surveymonkey.com%2Farticles%2Fen_US%2Fkb%2FHow-many-respondents-do-I-need) (Accessed July 2023)

- The number of replies in Europe and Latin America & the Caribbean is sufficiently large to be statistically significant with a margin of error of 5% with a confidence level of 90% and 85% respectively;
- The number of replies in Asia & Pacific and North Africa & the Middle East is statistically significant with a margin of error of 10% with a confidence level of 85%;
- The number of replies in the Sub-Saharan Africa and North America is statistically significant with a margin of error of 10% with a confidence level of 80%;

This means that the statistical significance of the results for Asia & Pacific, North Africa & the Middle East, as well as Sub-Saharan Africa and North America is low, in other words, while the results of the 6<sup>th</sup> IAU Global Survey can be used to make regional comparisons, they might not be representative of the overall population of HEIs in these regions, especially in Sub-Saharan Africa and North America.

This is something to bear in mind when regional results are presented in the next sections of the report.

Generally, the number of replies per country is not large enough to be statistically significant and therefore to allow a national analysis (the exceptions being Mexico and Azerbaijan and, to a lesser extent, Germany and Argentina).<sup>7</sup>

Statistical data (number of replies, number of institutions, etc.) for all countries are reported in Annex 5.

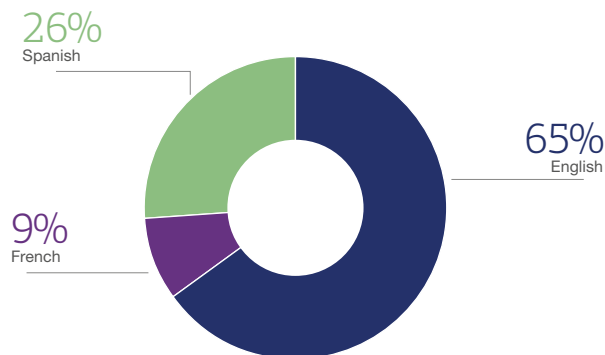
## Responses according to language

The 6<sup>th</sup> IAU Global Survey on Internationalization was an online survey available in three languages: English, French and Spanish.

The overall distribution of replies by language is reported in [Figure 3](#).

**Figure 3**

Distribution of HEIs by language of completion



7. The number of replies in Mexico (90% confidence level), Azerbaijan (85% confidence level), Germany, and Argentina (both at 80% confidence level) is statistically significant, with a margin of error of 10%.

The detailed distribution and analysis of replies according to language in the different regions and a comparison with the results of the 5<sup>th</sup> IAU Global Survey are available in Annex 6.

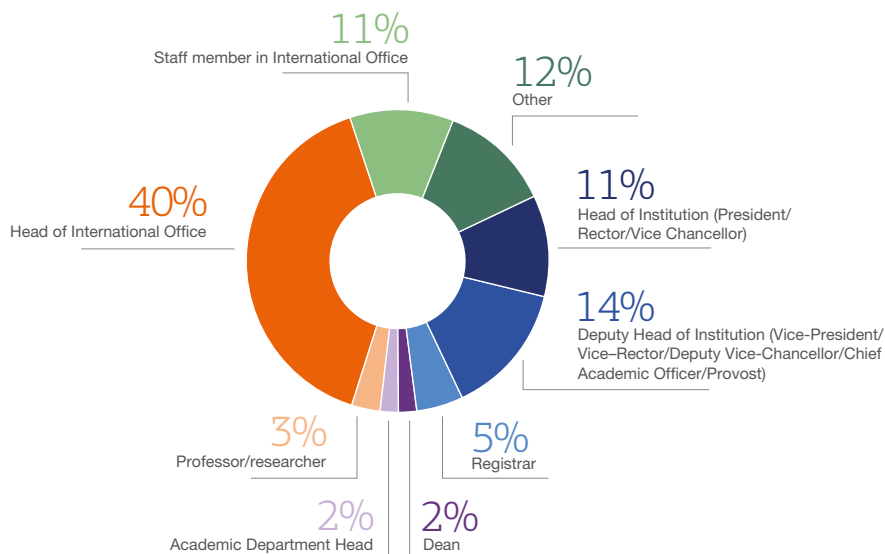
In summary, the 6<sup>th</sup> Global Survey saw an increase in the percentage of replies in English (65% vs. 54%), while the percentage of HEIs replying in French significantly decreased (9% vs. 20%) compared to the 5<sup>th</sup> edition. The availability of the survey in Spanish is likely to have contributed to collecting responses from HEIs in Latin America & the Caribbean, where replying in English could have been an obstacle. However, assessing the contribution of French-speaking countries, particularly in Africa, is challenging due to the decrease in responses. Despite these changes, there is an overall decrease in the total number of replies across all three languages.

## Position of the respondents

The position of individuals who responded to the survey varies, with heads of international offices representing the single largest group at about 40%. Staff members in international offices together with the head of the international office make up more than half of the respondents. Considering that the majority of the respondents who chose “other” hold administrative positions (e.g. assistant to the vice-rector for internationalization, head of academic mobility unit, advisor for internationalization, etc.), it can be concluded that the majority of respondents are administrative rather than academic staff. Heads of institutions together with the deputy heads of institutions constitute nearly a quarter of all respondents (Figure 4).

**Figure 4**

Position of respondents



Overall, the result of the 6<sup>th</sup> Global Survey is the same as the 5<sup>th</sup> edition. In the 5<sup>th</sup> Global Survey, heads of international offices represented 37% of respondents and, along with staff members in the international office, accounted for 50% of the total while academic leadership (heads of institutions and deputy heads of institutions) constituted 25% of respondents, exactly as in the current edition.

## Units/individuals inside the institution consulted to reply to the questionnaire

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As mentioned above, the 6<sup>th</sup> IAU Global Survey is intended to be an institutional survey; therefore, it was suggested that institutions reply from an institutional perspective, and that consultation should be carried out with all units/individuals in order to gather necessary information.

The results of the previous question on respondents' position must be taken into account to analyse the replies to this question; the overall results do not make sense unless the position of the respondent is defined.

“Heads of international offices” - the largest group of respondents - did consult a variety of units/individuals, but there is no one single unit that emerges as common to the majority of HEIs, thus underlying that the process varied within institutions. The most common units/individuals consulted were “Staff member in International Office” at 42% of HEIs, and “Deputy Head of Institution” at 39% of HEIs.

We see similar results when heads of institutions replied. For them there is no unit/individual that stands out as being consulted at the majority of HEIs, but the most common were “Deputy Head of Institution” (at 47% of HEIs) and “Head of International Office” (43%).

The situation is slightly clearer when respondents are deputy heads of institutions; even if there is still variety, just over half indicated having consulted the Head of International Office and slightly less consulted other deputy heads of institutions.

When staff members in the international offices replied, the majority of them indicated that they consulted only two types of individuals: the Head of the International Office (66%) and other staff members in the International Office (52%). As these replies came wholly from within international offices, they may be somewhat biased and thus not representative of the institutional perspective.

The number of all other respondents is too low to carry out any meaningful analysis.

In conclusion, the results show that the consultation process inside institutions is diverse. However, it is clear that this took place mainly between the international office and the academic leadership (heads and deputy heads of institutions) and that it rarely included other units/individuals.

This result is symptomatic of a top-down approach to internationalization, which bears some risks for the involvement of and ownership by the whole academic community.

## Institutional profiles

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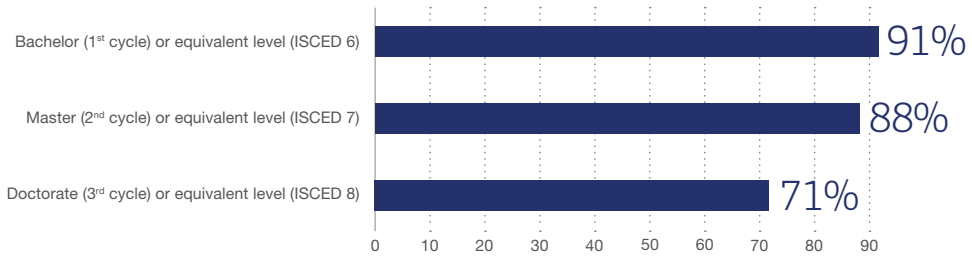
To provide a comprehensive picture of participating institutions, the survey also inquired about the level of qualifications offered, size of student enrolment, type (i.e. public vs private) and research/teaching focus.

### Level of qualifications offered

Almost all HEIs offer BA/BSc programmes, with a slightly lower percentage offering MA/MSc programs, and more than two-thirds of HEIs providing qualifications at the doctoral level (Figure 5).

**Figure 5**

Levels of qualification offered



This result is very similar to the 5<sup>th</sup> Global Survey (BA/BSc 91%, MA/MSc 84% and Doctorate 67%).

Unfortunately, it was noted that there were some inconsistencies in the responses received from participating HEIs regarding the level of qualifications offered, with 34 HEIs indicating “Doctorate” as the only level of education offered by the institution. These inconsistencies were carefully examined and verified, and it was determined that the erroneous replies did not accurately reflect the actual offerings of these institutions. Nevertheless, in the interest of maintaining data integrity and inclusivity, these responses were retained in the dataset for further analysis.

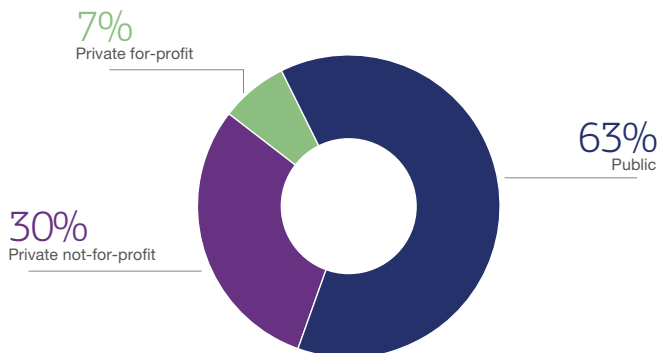
In the subsequent sections, the overall analysis includes all responses received, both consistent and inconsistent, to provide a comprehensive representation of the survey data. However, to ensure transparency and to mitigate the potential impact of these inconsistencies, a separate analysis of the level of qualifications offered, thus correcting the replies of the afore-mentioned 34 HEIs, is presented in Annex 9.

### Type of institution

The majority of responses came from public universities, 458 out of 722, making up about 63%, 214 (30%) were from private not-for-profit institutions and 43 (7%) from for-profit universities (Figure 6).

**Figure 6**

Type of institution





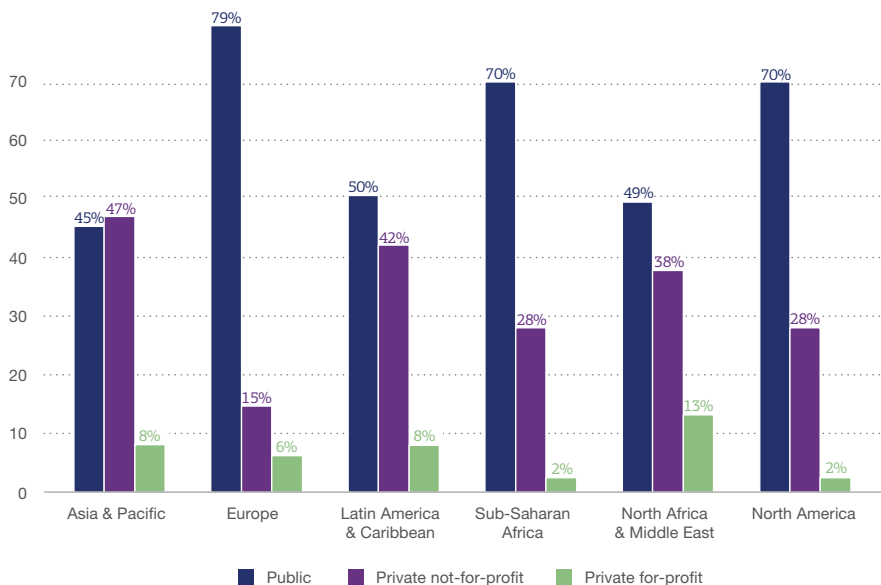
Comparing this distribution with data from the WHED (43% public vs. 57% private), it is clear that public HEIs are over-represented in the 6<sup>th</sup> IAU Global Survey, while private HEIs are under-represented.

The distribution of replies is not the same across regions; while in Europe (79%), North America and sub-Saharan Africa (both 70%) the overall majority of respondents are public institutions, in Asia & Pacific (55%, with 47% not-for-profit and 8% for profit) respondents from private institutions are the majority. In Latin America & the Caribbean and in North Africa & the Middle East there is an almost equal distribution between public and private institutions.

The percentage of respondents from private for-profit institutions is low in all regions, with North Africa & the Middle East having the highest percentage at 13% (Figure 7).

**Figure 7**

Type of institution by region



Once more, comparing these results with the distribution of HEIs in the WHED reveals a varying degree of over-representation of public universities in all regions. In North Africa & the Middle East the difference is small (49% vs. 46%), in Asia & Pacific it is relatively small (45% vs. 39%), in Europe it starts to become substantial (79% vs. 68%) but it does not reverse the balance, while in Latin America & the Caribbean (50% vs. 33%), Sub-Saharan Africa (70% vs. 39%) and North America (70% vs. 33%) it is substantial and completely opposed to the distribution of the WHED. Especially in Sub-Saharan Africa and North America we should bear in mind that survey results are describing public HEIs rather than the whole sector. The reason why public HEIs are replying more than private HEIs might be due to the fact that many private HEIs in the world are small, teaching-oriented institutions that are not specifically engaged internationally. However, this is only a hypothesis.

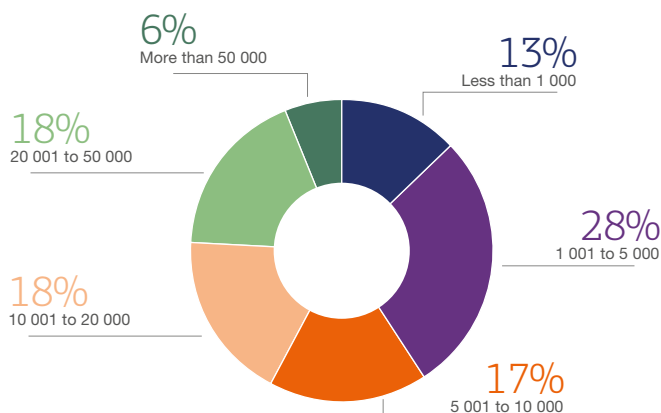
Finally, when we compare these results with those of the 5<sup>th</sup> Global Survey, the percentage of respondents from public institutions decreased from 72% to 63%, while the number of respondents from private not for-profit and private for-profit institutions increased from 24% to 30% and from 4% to 7% respectively.

## Size of institutions

In terms of student enrolment for the academic year starting in 2021, most responses came from small to medium-sized institutions, with 58% of HEIs having 10 000 students or fewer (Figure 8).

**Figure 8**

Size of institution



This distribution is almost the same as in the 5<sup>th</sup> Global Survey, the biggest variation being only 3% (HEIs with less than 1 000 students made up 16% of respondents in the 5<sup>th</sup> Global Survey, while they account for 13% in the 6<sup>th</sup>).

## Summary of institutional profile

To sum up, we can conclude that about two-thirds of participants are medium-small (fewer than 20 000 students) public institutions, focused roughly equally on both teaching and research and offering all three-degree types (Bachelor, Master, Doctorate) and they are based either in Europe or Latin America & the Caribbean.

This profile of a typical institution replying to the survey closely resembles that of the 5<sup>th</sup> Global Survey and, if we exclude the geographical location, also of the 4<sup>th</sup> Global Survey. The fact that institutional profiles of respondents have remained stable over three editions of the survey helps us in interpreting the differences in the results between the three editions of the survey.

## Language usage as a medium of instruction across institutions

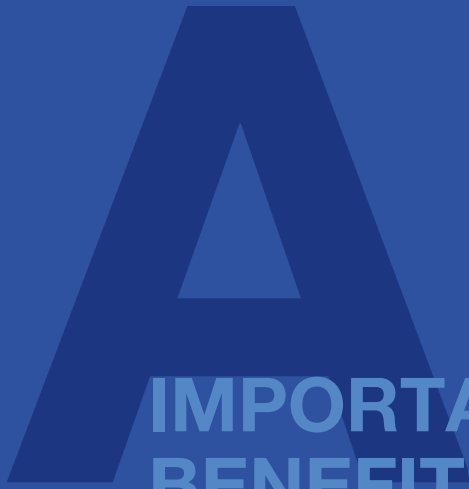
Of the 722 responses, the overall majority, 583, (81%) report having one official language as the primary medium of instruction. Only in some cases, do they report having two or even three. Seventy-three (10%) of institutions adopt a bilingual approach, employing both official and non-official languages of the country in which they are based. English frequently features as the language of instruction even though it is not an official language in the country. It is interesting

to note that two-thirds of these HEIs (48 out of 73) are public institutions, accentuating a higher prevalence of bilingualism in publicly-funded HEIs.

In 65 institutions (9%), we see a language which is not the official language of the country taking precedence as the primary medium of instruction. English emerges as the predominant non-official language within this subset. Notably, it is crucial to acknowledge exceptions in certain cases where historical factors, often tied to a colonial past, play a significant role. For instance, in countries like Algeria, Mauritania, Morocco, and Tunisia, French stands out as the preferred language of instruction due to historical ties. Moreover, 39 of these institutions are private not-for-profit, suggesting a higher prevalence of non-official language dominance in privately-funded HEIs.

These results show that in terms of language of instruction, monolingualism is still predominant in the world and that when bi- or even trilingualism is present, it is often due to the fact that the country has more than one official language and the institutions adopt these official languages as mediums of instruction.

However, it is interesting to point out the role of English, which at some institutions is the primary medium of instruction, even if it is not an official language of the country. Although this happens only at a minority of institutions, it is a signal of the importance of English as the academic lingua franca.



# IMPORTANCE, BENEFITS AND CHALLENGES TO INTERNATIONALIZATION

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# Part A.

## IMPORTANCE, BENEFITS AND CHALLENGE TO INTERNATIONALIZATION

Part A investigates the importance attributed to internationalization by academic leadership; the internal and external drivers, the benefits, the risks and challenges/obstacles to internationalization. This part is also present in previous editions of the survey and allows for comparison of the results and to study evolution over time of the above-mentioned aspects of internationalization. The main results are reported below.

### Main results part A

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#### *Importance of internationalization*

- The level of importance of internationalization is high at the majority of HEIs (77%) and it has increased over the last five years across all types of HEIs, including those where the level of importance was and still is low. Contrary to what was shown in the 5<sup>th</sup> edition of the survey, this trend might help reduce inequalities between HEIs as internationalization may become important at all HEIs, even at those where it was not previously.
- The primary driver for the increase in the importance of internationalization at the global level is clearly the “Increased need to strategically connect with other HEIs globally”, underlying the strategic nature of internationalization as an intentional process undertaken by HEIs.

#### *Drivers of internationalization*

- Institutional leadership and the international office are identified as the main internal drivers for internationalization.
- At the global level, it is difficult to identify the most important external drivers for internationalization as several were selected by similar percentages of HEIs (“Demand from foreign higher education institutions”, “National and international rankings”, “Global policies/agenda (including the UN Agenda)”, “Government policy (national/state/province/municipal)” and “Business and industry demand”). However, at the regional level there are interesting findings: “Demand from foreign higher education institutions” is the most important driver in Europe and Latin America & the Caribbean, even if by small margins, while “National and international rankings” is the most common driver, clearly in North Africa & the Middle East and Sub-Saharan Africa, and also in Asia & Pacific, but by a small margin. Finally, “Business and industry demand” is the top driver in North America.

#### *Benefits of internationalization*

- “Enhanced international cooperation and capacity building” remains the most important benefit of internationalization at global level and in all regions except North America, as was the case in the 5<sup>th</sup> Global Survey. “Increased global, international and intercultural

knowledge, skills and competences for both students and staff” is the second most important benefit at global level and the first in North America.

### **Risks of internationalization**

- There is no common institutional risk for HEIs at global level, but a variety of risks (e.g. “Increased workload for academic and administrative staff”, “Difficulty to combine/integrate it with other institutional priorities (e.g. diversity, equity, and inclusion and sustainable development)”), do have differing levels of importance at distinct HEIs. Europe and North America are the only two regions where one clear institutional risk (Increased workload for academic and administrative staff) emerges as the most important.
- Likewise for societal risks, no overall risk emerged as being common to the majority of HEIs, depicting a very diverse landscape of societal risks around the world. However, regional analysis reveals that “Brain drain” is clearly the most important risk in Sub-Saharan Africa, where it was selected by three quarters of HEIs.

### **Obstacles/challenges to internationalization**

- “Insufficient financial resources” is clearly the main internal obstacle to internationalization at global level and in all regions but North America, where it is second to “Competing priorities at institutional level”.
- “Limited funding to support internationalization efforts/to promote our institution internationally” is the most common external obstacle/challenge to internationalization at global level and in all regions but North America, where it is still common to the majority of HEIs and second to “Visa restrictions imposed by our country on foreign students, researchers and academics”.

## **Level of importance of internationalization for institutional leadership**

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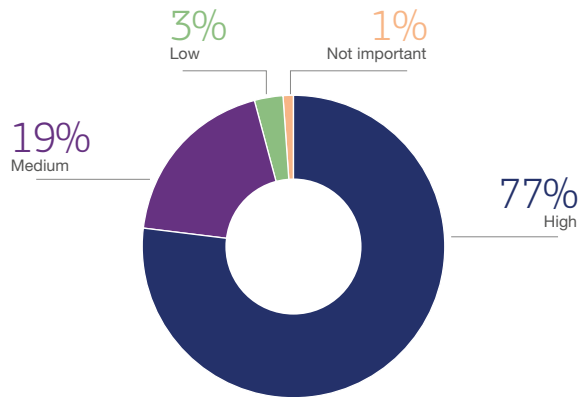
A significant majority of respondents, 77%, indicated that internationalization is of high importance to their leadership. Just under one-fifth (19%) replied that internationalization held a medium level of importance. A small proportion, only 4%, regarded internationalization as having low or no importance to the leadership of their institutions (Figure 9).

Compared to the results of the 4<sup>th</sup> (69% high, 25% medium and 5% low) and 5<sup>th</sup> Global Surveys (68% high, 26% medium, and 5% low) the results of the 6<sup>th</sup> edition show an increase in the percentage of respondents indicating a high importance and a decrease in the percentages indicating medium and low importance. This indicates that in the last five years internationalization has become even more important for the leadership of HEIs around the world.

The previous result becomes even more intriguing considering the correlation between the positions held by the survey respondents. Remarkably, all institutional actors, excluding professors/researchers, consider that their institutional leadership attributes high importance to internationalization, with around 80% of them selecting “high importance”. However, only 55% of professors/researchers think that their academic leadership attributes “high importance” to internationalization, with 18% of them thinking that their academic leadership considers internationalization of “low importance” or “not important”.

**Figure 9**

Level of importance of internationalization for academic leadership



Comparing this with the 5<sup>th</sup> Global Survey, it becomes evident that irrespective of respondents' position, their perception of the importance given by their academic leadership to internationalization has increased. This is equally true when respondents are professors/researchers, even if, as previously stated, they remain the group where the perception of importance attributed by leadership is lowest.

As respondents in the two editions of the survey are not affiliated to the same institutions, and the number of replies varies significantly across different groups, definitive conclusions cannot be made, but professors/researchers appear to hold a relatively lower perception of the importance attributed to internationalization by their academic leadership compared to any other institutional actor (Table 3 and 4).

**Table 3**6<sup>th</sup> Global Survey

Level of importance of internationalization for institutional leadership	Head of Institution	Deputy Head of Institution	Registrar	Dean	Academic Department Head	Head of International Office	Staff member in International Office	Professor/researcher	Other	All
High	84%	85%	81%	80%	79%	77%	73%	55%	74%	77%
Medium	12%	13%	19%	13%	21%	19%	24%	27%	24%	19%
Low	4%	2%	0%	7%	0%	4%	3%	9%	2%	3%
Not important	0%	0%	0%	0%	0%	1%	0%	9%	0%	1%

**Table 4**

5<sup>th</sup> Global Survey

Level of importance of internationalization for institutional leadership	Head of Institution	Deputy Head of Institution	Registrar	Dean	Academic Department Head	Head of International Office	Staff member in International Office	Faculty member	Other	All
High	76%	80%	62%	62%	65%	66%	69%	45%	73%	68%
Medium	20%	17%	29%	31%	32%	29%	23%	37%	22%	26%
Low	3%	4%	10%	8%	3%	5%	5%	11%	1%	5%
Not important	0%	0%	0%	0%	0%	0%	1%	8%	1%	1%
Don't know	1%	0%	0%	0%	0%	0%	2%	0%	3%	1%

### Regional and private vs. public analysis

There is no difference between public and private HEIs in terms of the level of importance of internationalization for institutional leadership.

Adversely, the regional analysis shows that the level of importance for institutional leadership is not the same in all regions of the world. Internationalization is highly important in Asia & Pacific and Europe (both at 85%), where HEIs report a “high” level of importance for internationalization. It is also important in all other regions of the world, although the percentage of HEIs reporting a “high” level of importance decreases from 77% in North Africa & the Middle East to 72% in Sub-Saharan Africa, 70% in Latin America & the Caribbean to 63% in North America, where 9% report a “low” importance, the highest percentage of all regions (Table 5).

Comparing this result to the 5<sup>th</sup> Global Survey (Table 6), there has been a slight increase in the importance of internationalization across the majority of regions. We can observe an increase in Asia & Pacific and Europe, where high importance has risen from around 70% to 85%.

Latin America & the Caribbean has also witnessed a notable increase, with high importance climbing from almost 60% to 70%. Even in North America, where the importance was and still is the lowest, there has been an improvement with high importance moving from 53% to 63%. Sub-Saharan Africa and North Africa & the Middle East have different regional distributions from the 5<sup>th</sup> edition that make direct comparison challenging, however comparing the percentages of HEIs choosing high importance it seems that in these two regions there has been a decrease in the perception of importance from the 5<sup>th</sup> to the 6<sup>th</sup> edition. The reasons behind this apparent decrease in importance of internationalization in these two regions are not easy to guess.



**Table 5**6<sup>th</sup> Global Survey

Level of importance of internationalization for institutional leadership	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
High	85%	85%	70%	72%	77%	63%	77%
Medium	13%	12%	26%	26%	17%	28%	19%
Low	2%	2%	4%	2%	3%	9%	3%
Not important	0%	1%	0%	0%	3%	0%	1%

**Table 6**5<sup>th</sup> Global Survey

Level of importance of internationalization for institutional leadership	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
High	77%	71%	72%	59%	83%	53%	68%
Medium	15%	24%	24%	33%	14%	34%	26%
Low	5%	3%	3%	6%	3%	11%	5%
Not important	2%	0%	0%	1%	0%	2%	1%
Don't know	2%	1%	0%	2%	0%	0%	1%

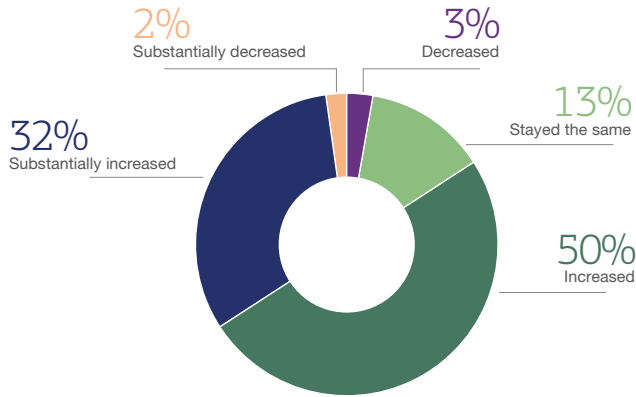
Finally, it is interesting to report that the results for Europe are in line with the results of the European University Association EUA Trends survey (EUA, forthcoming): Internationalization is ranked as of highest importance to participants, who are HEIs leaders in the European Higher Education Areas: 83% of them state that internationalisation is of high importance with another 15% ranking it as of medium importance.

## Change of the level of importance of internationalization for academic leadership in the last five years

Looking at how the level of importance of internationalization has changed for institutional leadership in the last five years, more than 82% replied that the level has risen, with 32% indicating that it has “substantially increased” and 50% claiming that it has “increased” (Figure 10).

**Figure 10**

Change in the level of importance of internationalization over the last five years

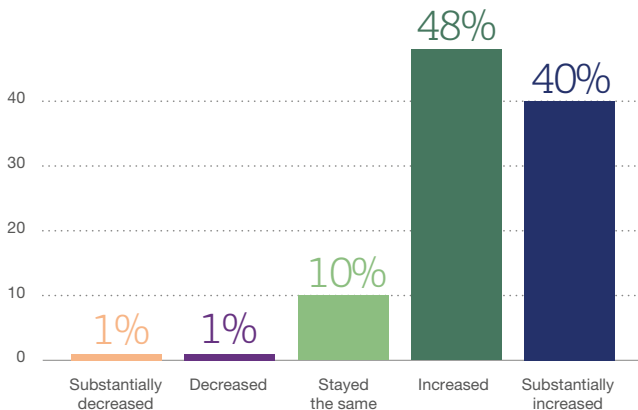


This result is in line with the increase in HEIs attributing a high level of importance to internationalization since the 5<sup>th</sup> Global Survey. However, it is interesting to analyse separately this variation in the level of importance for each of the three groups of respondents, namely those that replied “high”, “medium” and “low” in the question on the importance of internationalization for leadership.

Eighty-eight per cent of institutions replying that the level of importance of internationalization for their institutional leadership is “high” also reported that this level has increased, with 40% reporting a substantial increase over the last five years (Figure 11).

**Figure 11**

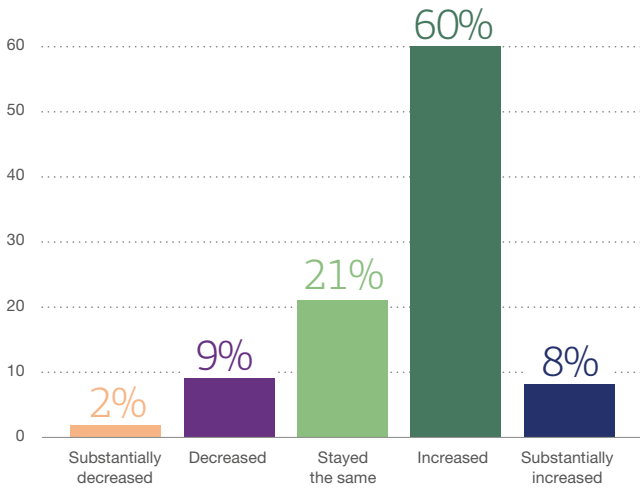
Internationalization has “high importance” — How has this changed over the last five years?



When looking at institutions where leadership considers the level of importance of internationalization as “medium”, the overall majority (68%) report an increase in importance over the last five years. However, the percentage of institutions that report a substantial increase drops from 40% to 8% (Figure 12).

**Figure 12**

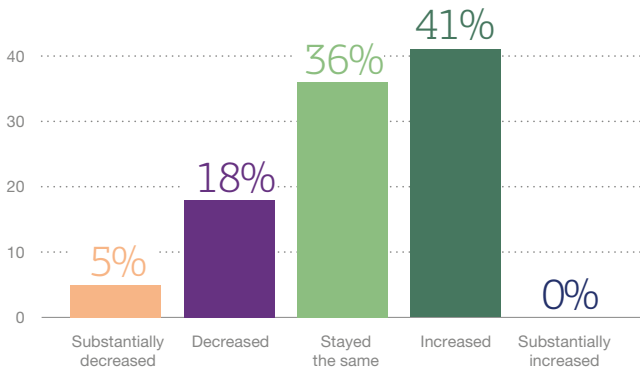
Internationalization has "medium importance" — How has this changed over the last five years?



Finally, looking at institutions where the level of importance of internationalization is considered "low" by institutional leadership, remarkably 41% report an increase in the level of importance of internationalization, while 36% report that the level has not changed and 23% report a decrease in the level of importance (Figure 13).

**Figure 13**

Internationalization has "low importance" — How has this changed over the last five years?



This explains why the overall distribution of HEIs according to the level of importance of internationalization for their institutional leadership has slightly changed since the 5<sup>th</sup> Global Survey. In fact, even if the increase in the level of importance in the last five years has taken place predominantly at HEIs where the level of importance was already high, it happened also at institutions where the level of importance was medium and low.

This result is particularly encouraging, as it indicates a positive trend in the importance of internationalization among both HEIs that already prioritise it and those that do not.

This situation is completely different from that of the 5<sup>th</sup> edition, where the increase in the level of importance took place almost exclusively at HEIs that already considered internationalization highly important but not at HEIs that considered internationalization of low importance. That situation could have had negative consequences, such as the emergence of a gap between HEIs that prioritise internationalization and those that do not. On the contrary, the new trend observed in the 6<sup>th</sup> edition suggests a more inclusive landscape. This is evident from the increase in the percentage of institutions reporting that the importance of internationalization has increased for their institutional leadership despite still being of “low” importance. This shift suggests a broader recognition and engagement with internationalization across a wider range of HEIs, fostering a more balanced and comprehensive approach to global engagement in higher education. However, the significantly lower number of responses (3%) in the “low” importance group may impact the representativeness and generalizability of this finding.

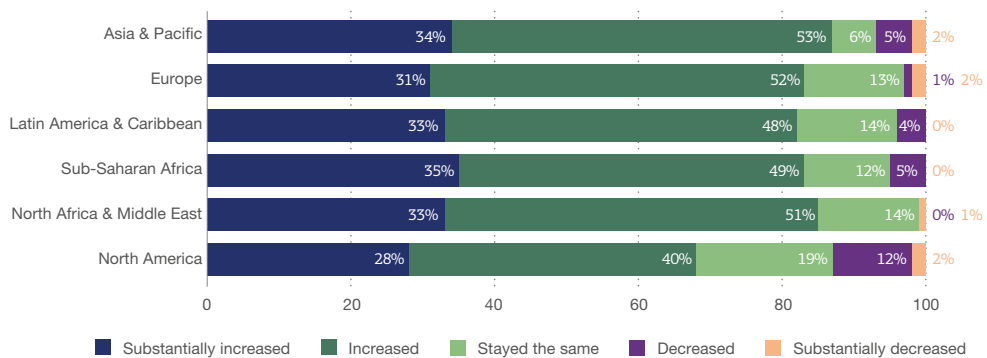
### Regional and private vs. public analysis

Differences between public and private HEIs are small, with just a slightly higher percentage of private HEIs indicating a substantial increase in importance (36% vs. 30% for public HEIs).

The regional analysis of changes in the level of importance of internationalization over the past five years reveals an interesting trend. Among all the regions, North America is the only region where a non-negligible percentage of HEIs report a decrease in importance of internationalization (14%) while the other regions are more or less similar and in line with the global trend (Figure 14).

**Figure 14**

Change in the level of importance of internationalization over the last five years by region



Comparing the results to the 5<sup>th</sup> Global Survey, no significant variations can be seen in any region.

The number of HEIs that reported “medium” and especially “low” levels of importance of internationalization is too small to perform a reliable regional analysis of the change in the level of importance. However, results suggest that the global trend of internationalization assuming even more importance at HEIs that already consider it highly important is present in all regions of the world.

## Factors behind the change of importance of internationalization

HEIs that reported a change in the level of importance of internationalization for academic leadership in the last five years were also asked to identify the factors behind such a change.

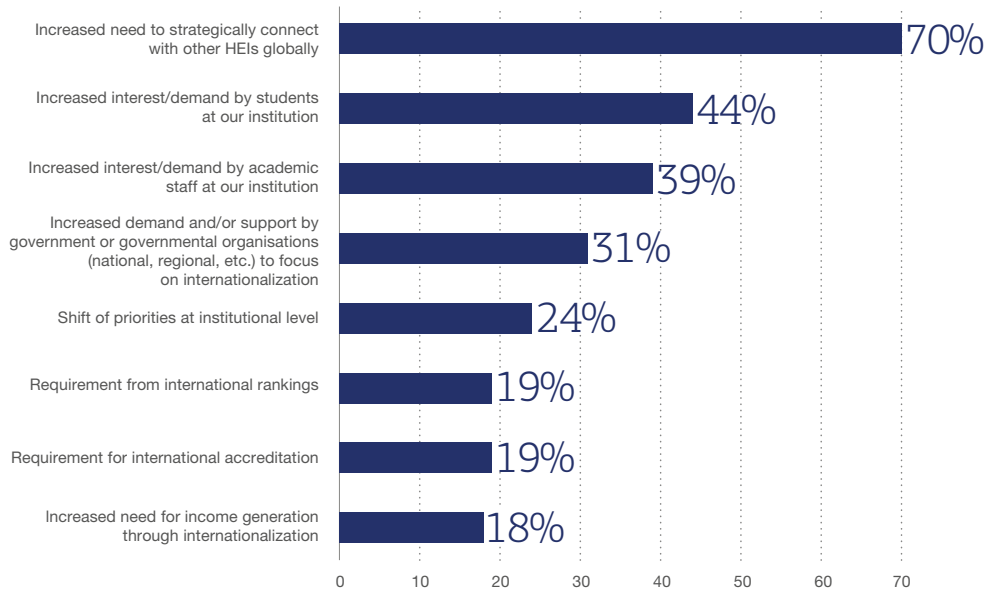
### Factors behind increases

Among the various factors listed, the primary driver for the increase in the importance of internationalization at the global level is clearly the “Increased need to strategically connect with other HEIs globally”, which was selected by 70% of HEIs.

All other factors were chosen by less than half of HEIs. The second most common is “Increased interest/demand by students at our institution”, chosen by 44% of HEIs, and the third “Increased interest/demand by academic staff at our institution”, selected by 39% (Figure 15).

**Figure 15**

Factors/reasons most responsible for the increase in the level of importance of internationalization



The fact that the most important factor is “Increased need to strategically connect with other HEIs globally” underlines the strategic nature of internationalization as an intentional process undertaken by HEIs.

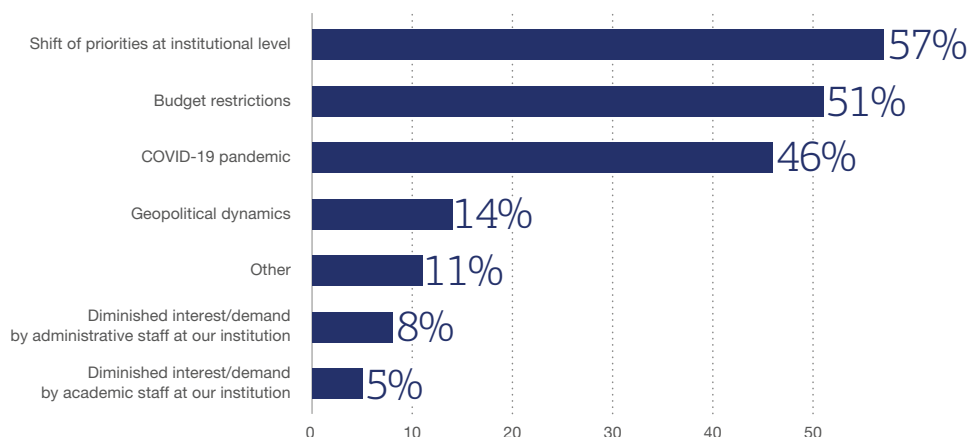
### Factors behind decreases

The main driver for the decrease in importance at the global level appears to be a shift in institutional priorities, chosen by 57% of HEIs. Budget restrictions is the second one, important for roughly half of HEIs and the COVID-19 pandemic is also important for slightly less than half

of HEIs. Other factors exhibit relatively lower percentages, indicating their impact is of less importance. However, it is important to interpret these findings with caution due to the limited number of respondents (37) to this question. In fact, only 3% of HEIs reported a decrease in the level of importance in the last five years (Figure 16).

**Figure 16**

Factors/reasons most responsible for the decrease in the level of importance of internationalization



### Regional and private vs. public analysis

“Increased need to strategically connect with other HEIs globally” is clearly the main factor for the increase in importance at both private and public HEIs.

However, while for public HEIs all other factors have been chosen by less than half of respondents, “Increased interest/demand by students at our institution” is important for 55% of private HEIs.

The number of HEIs having replied that the level of importance for their leadership has decreased is too low to conduct a reliable analysis on private vs. public. However, the results seem to indicate that there are no major differences between the two groups.

A reliable regional analysis is possible only for the factors behind increases in importance. For the decrease in importance, no regional analysis makes sense, due to the relatively low number of respondents.

Globally, all regions identified an increased need to strategically connect with other HEIs. Nonetheless, it is interesting to note that while in Asia & Pacific, Europe, and Latin America & the Caribbean about three-quarters of HEIs selected this factor, in North Africa & the Middle East just over half did so (53%) and in North America slightly less than half (48%) did so.

Moreover, in North America, there is another notable difference when compared to other regions: “Increased need for income generation through internationalization” is the second most important factor, chosen by almost half of HEIs (45%), a much higher percentage than in any other region.

Latin America & the Caribbean shows a higher level of “increased interest/demand by academic staff”, chosen by half of HEIs. Additionally, “Increased interest/demand by students at our

institution” is important in this region, chosen by more than half of HEIs (55%). On the contrary, this factor appears to be of lower importance in Sub-Saharan Africa (25%) and North America (31%).

Finally, Asia & Pacific is the region with the highest percentage of “Increased demand and/or support by government or governmental organisations to focus on internationalization” (48%) (Table 7).

**Table 7**

Most responsible factors for the increase of internationalization by region	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Increased need to strategically connect with other HEIs globally	76%	73%	73%	67%	53%	48%	70%
Increased demand and/or support by government or governmental organisations (national, regional, etc.) to focus on internationalization	48%	36%	19%	28%	34%	21%	31%
Increased interest/demand by academic staff at our institution	24%	34%	50%	39%	43%	28%	39%
Increased interest/demand by administrative staff at our institution	4%	11%	11%	3%	5%	24%	10%
Increased interest/demand by students at our institution	46%	40%	55%	25%	38%	31%	44%
Increased need for income generation through internationalization	15%	20%	8%	33%	17%	45%	18%
Requirement for international accreditation	24%	14%	20%	11%	36%	7%	19%
Requirement from international rankings	24%	15%	10%	36%	48%	21%	19%
Shift of priorities at institutional level	13%	16%	23%	9%	13%	21%	18%
Other	6%	6%	8%	3%	3%	3%	6%

Comparing the results to the 5<sup>th</sup> Global Survey is not possible in this case, because these two questions were introduced only in the 6<sup>th</sup> Global Survey.

## Key internal drivers of internationalization

Internationalization is ideally an intentional process undertaken by HEIs, and as such is led by several key drivers internal to the institutions.

In contrast to previous survey editions, where HEIs were asked to rank their top three internal drivers from a predetermined list, the 6<sup>th</sup> Global Survey took a different approach. Respondents were asked to assess the level of importance of key internal drivers of internationalization at their institutions from a pre-established list. They indicated the significance of each driver by selecting from options such as “very important,” “important,” “somewhat important,” or “not important.”

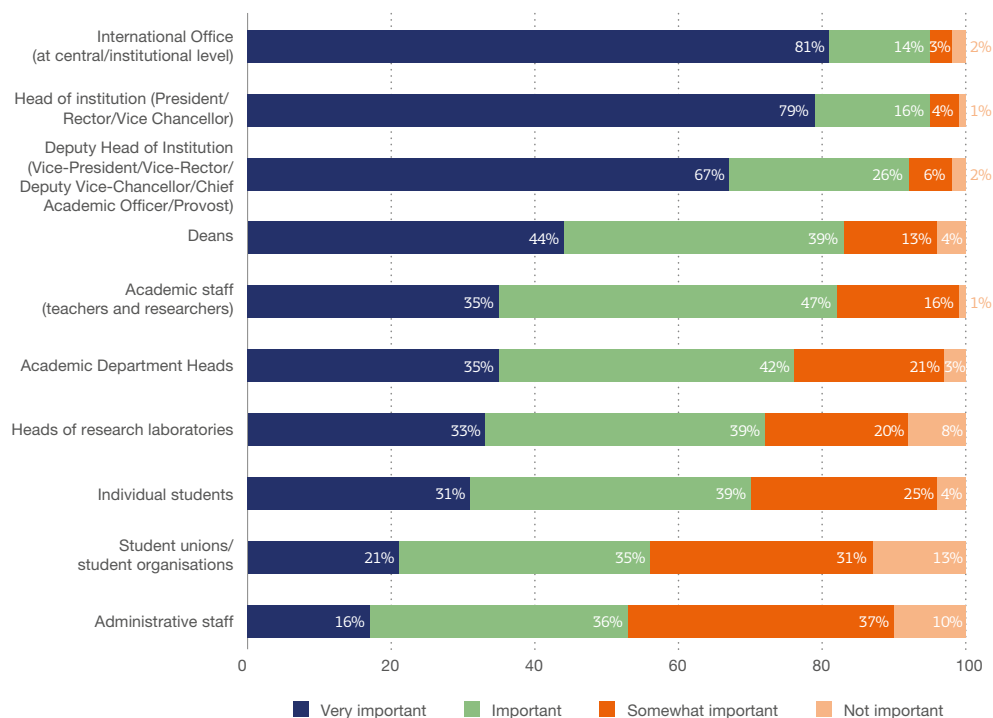
As seen in Figure 17, the significance of key internal drivers is evident. The International Office at central/institutional level garnered a “very important” rating from 81% of respondents, closely followed by the Head of Institution at 79%. Similarly, 67% of participants deemed the Deputy Head of Institution as “very important.”

This result highlights the influential role of these stakeholders in shaping internationalization strategies within HEIs, but at the same time it also emphasises the significance of a top-down approach to this process. Nonetheless, all internal drivers suggested were considered to be “important” or “very important” by the majority of respondents.

Finally, an interesting and somewhat curious result is that individual students are considered to be more important than student unions/student organisations as internal drivers of internationalization (Figure 17).

**Figure 17**

Most important institutional key internal drivers of internationalization



It is intriguing to observe the correlations between the position of respondents and their perceptions of key internal drivers of internationalization.

Among all respondents, excluding heads of international offices and staff members in the international office, the head of the institution is considered the most important key international driver, especially among registrars (91%), deputy heads of institutions (94%), and the heads of institutions themselves (91%).

In contrast, heads of international offices (89%) consider the international office as the most important drivers, while 76% of them also recognize the head of the institution as a significant



driver. Among staff members in the international office, 85% view the international office as the most crucial driver, followed by 70% considering the head of the institution in the same regard.

Notably, heads of institutions are the only respondents, apart from deputy heads of institutions themselves, who consider the deputy heads of institutions almost as important as the international office itself in driving internationalization efforts.

Two trends can be identified: the first being that there is a shared understanding of the head of institution being the key internal driver and the second being an overestimation of their own importance as key drivers by almost all actors, but especially by heads of international offices.

In summary, these results indicate a shared understanding of the institution's leadership and the international office as the key internal drivers for internationalization efforts. However, various stakeholders within HEIs tend to overestimate their own influence in shaping these initiatives. Understanding these dynamics and perceptions is crucial for developing effective strategies to align internationalization efforts at all levels of the institution.

### Regional and private vs. public analysis

Both private and public HEIs clearly identify institutional leadership and the international office as the key internal drivers of internationalization. However, while for private HEIs the most important driver is the head of institution, for public HEIs it is the international office.

The regional analysis mirrors global trends in all regions. This is confirmed by looking at the key internal drivers of internationalization percentages under “very important” (Table 8).

**Table 8**

Key internal drivers of internationalization with “very important” percentages	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Academic Department Heads	37%	33%	33%	60%	42%	12%
Academic staff (teachers and researchers)	47%	32%	36%	60%	33%	16%
Administrative staff	19%	17%	15%	21%	19%	5%
Deans	61%	38%	39%	56%	62%	37%
Deputy Head of Institution (Vice-President/Vice-Rector/Deputy Vice-Chancellor/Chief Academic Officer/Provost)	71%	70%	63%	65%	65%	60%
Head of institution (President/Rector/Vice Chancellor)	87%	75%	81%	86%	81%	72%
Heads of research laboratories	42%	31%	28%	60%	42%	21%
Individual students	32%	28%	38%	30%	32%	14%
International Office (at central/institutional level)	76%	80%	88%	74%	67%	86%
Student unions/student organisations	27%	23%	18%	23%	23%	12%

However, in Sub-Saharan Africa, while the three main key internal drivers are evident and the same as in other regions, Academic Department Heads, Academic staff (teachers and

researchers) and Heads of research laboratories all exhibit a significant 60% rating, underscoring their crucial roles in driving internationalization efforts within the region. This could indicate a more collegial approach to internationalization in sub-Saharan Africa compared to other regions where a tendency towards a top-down approach is more visible (Table 8).

It can therefore be concluded that institutional leadership and international offices at central/institutional level are seen as driving internationalization in all regions of the world.

## Comparison with previous Global Survey results

Although the question was asked differently in the 5<sup>th</sup> and 6<sup>th</sup> Global Surveys, it is still possible to compare the three main international drivers. This comparison highlights the tendency towards a top-down approach in driving internationalization efforts. While caution is necessary when comparing editions of the survey due to above-mentioned question changes in the 6<sup>th</sup> Global Survey, the top three main drivers remain consistent: the head of institution, the international office, and the deputy head of institution. The importance of academic staff had already seen a slight decrease in the 5<sup>th</sup> edition when compared to the 4<sup>th</sup> edition, moving from third to fourth place, and now seems to be even lower with fifth position in terms of percentages. Conversely, the importance attributed to students as drivers significantly decreased in the 5<sup>th</sup> Global Survey when compared to the 4<sup>th</sup> edition and remains significantly low in the present edition.

These results invite reflection and actions by HEIs in order to avoid the risk of internationalization becoming too much of a top-down process, imposed on academic staff and students, instead of engaging them fully in the development and implementation of the process.

## Key external drivers of internationalization

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Even if internationalization is an intentional process undertaken by HEIs, it is not free from influence from external actors and forces. This question was also modified for the current edition: respondents were asked to assess the level of importance of key external drivers of internationalization at their institutions from a pre-established list.

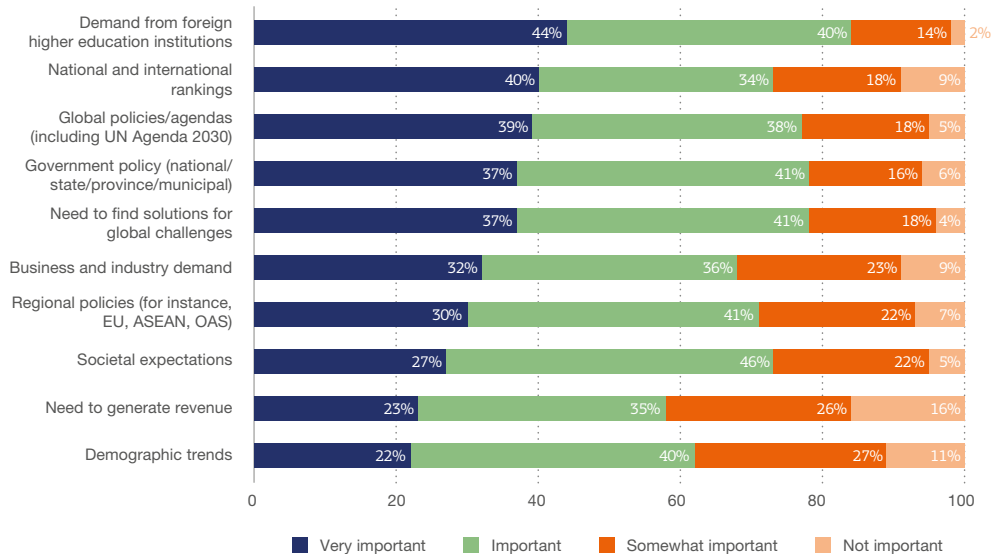
The first thing to be noted is that all drivers proposed are considered either “important” or “very important” by the majority of HEIs and that, unlike internal drivers where the three most important key drivers were evident, the difference between external drivers is more nuanced.

When analysing the most important key external drivers of internationalization marked as “very important,” the first three drivers are: “Demand from foreign higher education institutions”, “National and international rankings” and “Global policies/agenda (including the UN Agenda)”. However, they are followed very closely by “Government policy (national/state/province/municipal)” and “Business and industry demand”. Thus, drawing definitive conclusions is challenging due to the striking similarity in percentages among key actors and across different levels of importance, particularly between “very important” and “important.” For instance, “National and international rankings” is “very important” for 40% of HEIs and “important” for 34% of HEIs, while both “Government policy (national/state/province/municipal)” and “Need to find solutions for global challenges” are “very important” for 37% of HEIs and “important” for 41% of HEIs.

The percentages of “somewhat important” and “not important” remain relatively low and consistent across all drivers, with the exception of “Need to generate revenue,” which has the highest percentage of “not important” at 16% (Figure 18 and Table 9).

**Figure 18**

Most important key external drivers of internationalization

**Table 9**

Global Key external drivers of internationalization	Very Important	Important	Somewhat Important	Not Important
Demand from foreign higher education institutions	44%	40%	14%	2%
National and international rankings	40%	34%	18%	9%
Global policies/agendas (including UN Agenda 2030)	39%	38%	18%	5%
Need to find solutions for global challenges	37%	41%	18%	4%
Government policy (national/state/province/municipal)	37%	41%	16%	6%
Business and industry demand	32%	36%	23%	9%
Regional policies (for instance, EU, ASEAN, OAS)	30%	41%	22%	7%
Societal expectations	27%	46%	22%	5%
Demographic trends	22%	40%	27%	11%
Need to generate revenue	23%	35%	26%	16%

### Regional private vs. public analysis

The difference in importance of external drivers is small for both private and public HEIs. However, in both cases “Demand from foreign higher education institutions” is the one topping the list. The main difference between private and public HEIs is the relative importance of “National and international rankings” and “Need to find solutions for global challenges” (both of them higher for private HEIs) and of “Government policy (national/state/province/municipal)” (higher for public HEIs).

The regional analysis reveals similarities to the global level in Asia & Pacific, Europe, Latin America & the Caribbean and North Africa & the Middle East, while Sub-Saharan Africa and North America diverge substantially for the distribution of importance of each external driver and in opposite directions. In Sub-Saharan Africa, seven drivers out of the ten proposed are considered “very important” by the majority of HEIs while in North America none of them is considered “very important” by more than 35% of HEIs.

“Demand from foreign higher education institutions” is the most important driver in Europe and Latin America & the Caribbean, even if the difference with the second most important (“Government policy (national/state/province/municipal)” in Europe and “Global policies/agendas (including UN Agenda 2030) in Latin America & the Caribbean”) is small. It is the second most important in Asia & Pacific if looking only at the percentages of HEIs classing it “very important”, but first if the percentages of “very important” and “important” are taken together. It is also the second most important in North Africa & the Middle East, while in Sub-Saharan Africa and North America it is not among the top three.

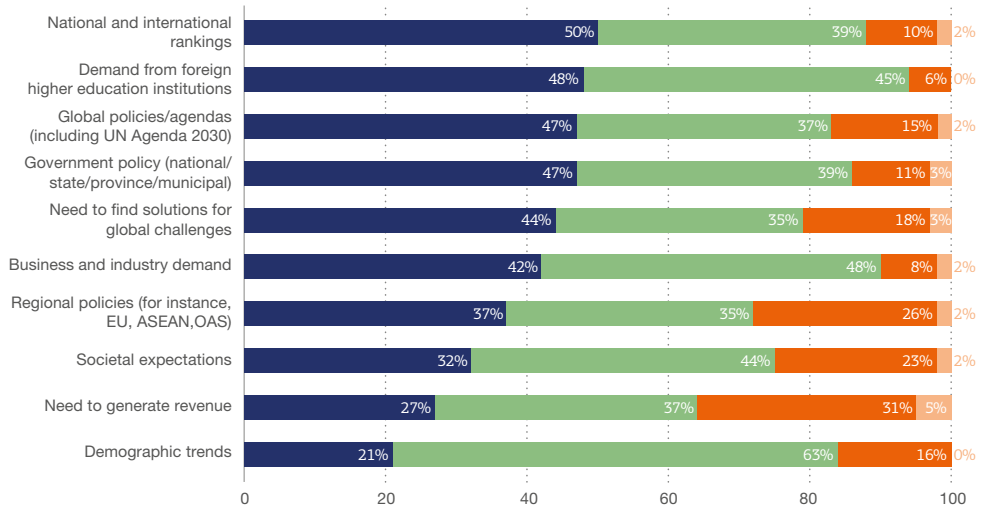
“National and international rankings” is the most common driver in Asia & Pacific, North Africa & the Middle East, and Sub-Saharan Africa however with different levels of importance. In Sub-Saharan Africa it is considered “very important” by a striking percentage of 86%, well above the second most important driver. In North Africa & the Middle East it is also considered “very important” by the majority of HEIs (65%), clearly ahead of the second most important driver. On the contrary, in Asia & Pacific is considered “very important” by only half of HEIs and the difference between the second (“Demand from foreign higher education institutions”) and third most important drivers (“Global policies/agendas (including UN Agenda 2030)”) is small. In all other regions it is not among the top three and in North America, it is the third least important. It is interesting to note that the importance of “National and international rankings” is high in the regions that have few or no HEIs at the top of international rankings (North Africa & the Middle East, and Sub-Saharan Africa) while is low in the regions where the leading HEIs in rankings are based (North America). This could indicate an understanding of internationalization by low ranked HEIs as a way of improving their standing in the rankings. If this is the case, it is a worrying signal, as these HEIs would internationalize for completely the wrong reason (i.e. improving their standings in rankings) instead of finding a way to internationalize that brings benefits to their academic and local communities and societies.

“Business and industry demand” is the top driver in North America in terms of percentages of HEIs considering it “very important”, but it is only the third beyond “Demographic trends” and “Need to generate revenue” if taking together the percentages of “very important” and “important”.

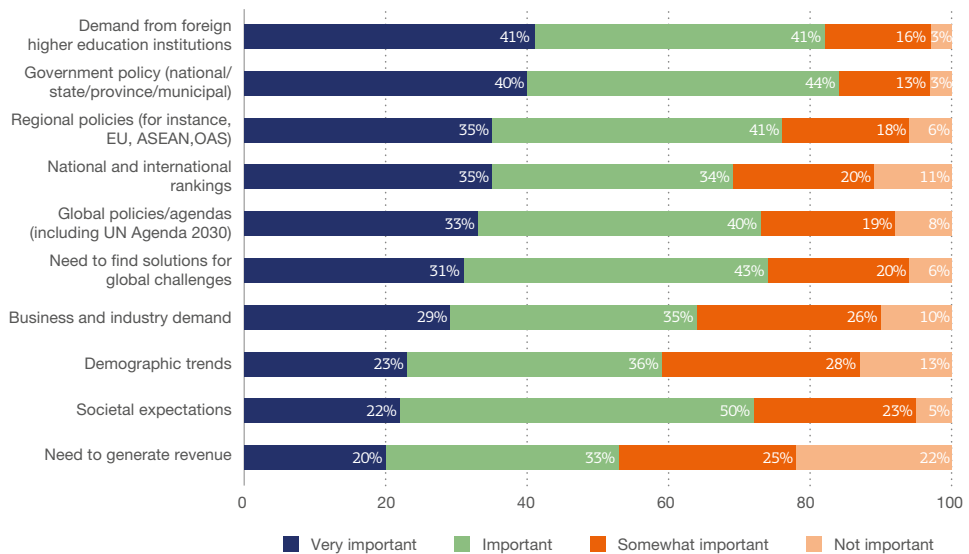
It is interesting to underline that North America is completely different from all other regions; none of the top three drivers in North America are among the top three in any of the other regions and vice-versa none of the top three drivers of the other regions are among the top three in North America (Figure 19-24).

**Figure 19**

Most important external drivers in Asia &amp; Pacific

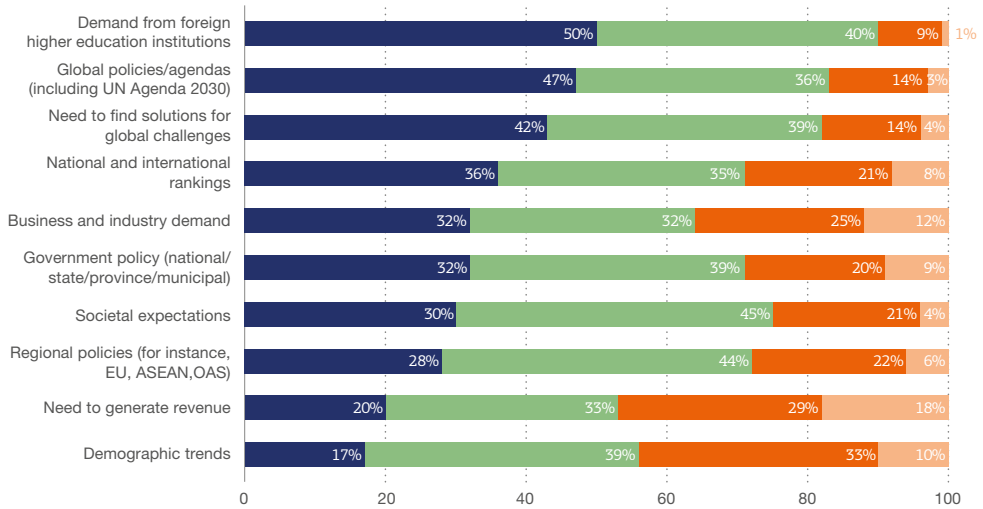
**Figure 20**

Most important external drivers in Europe



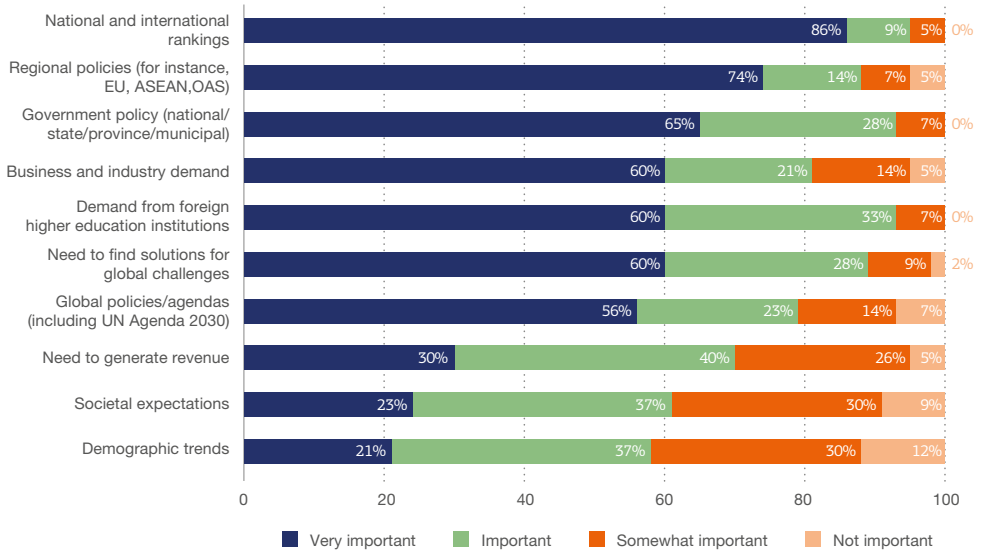
**Figure 21**

Most important external drivers in Latin America & Caribbean



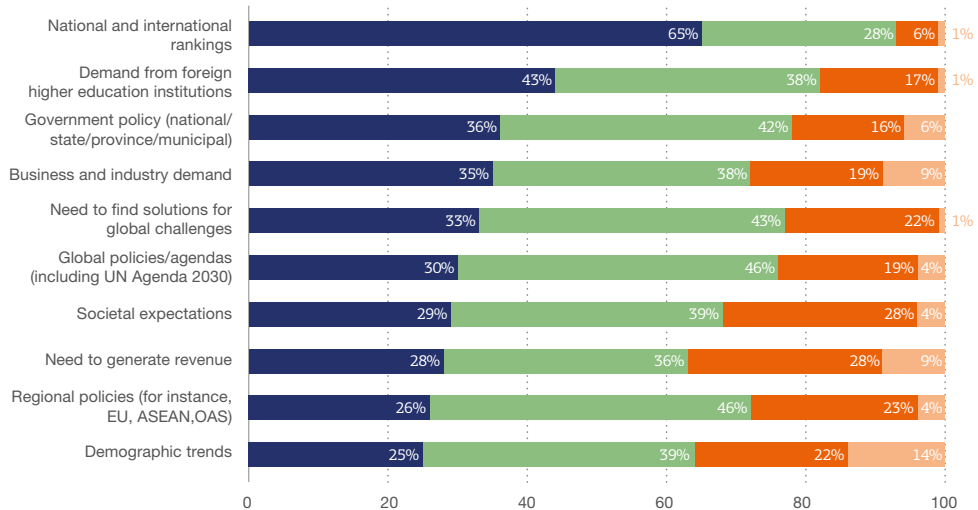
**Figure 22**

Most important external drivers in Sub-Saharan Africa

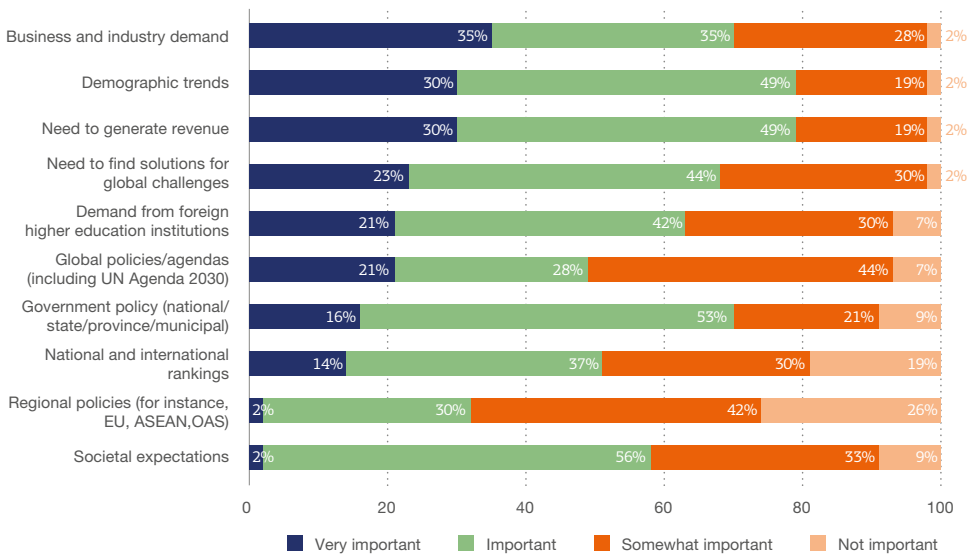


**Figure 23**

Most important external drivers in North Africa &amp; Middle East

**Figure 24**

Most important external drivers in North America



### Comparison with the 5<sup>th</sup> Global Survey results

These results cannot be directly compared to those of the 5<sup>th</sup> Global Survey due to changes in the way the respondents were asked to identify the most important external key drivers of internationalization. However, there appears to be both similarities and differences with the 5<sup>th</sup> edition, where “Business and industry demand”, “Demand from foreign higher education institutions”, and “Government policy (national/province/municipality)” had the highest

percentages. While neither “Business and industry demand” nor “Government policy (national/province/municipality)” are among the top three drivers in the 6<sup>th</sup> Global Survey, “Demand from foreign higher education institutions” is now the top driver. However, as mentioned before the difference in percentages is small for the top drivers and thus these results should be handled with care.

While the importance of “Government policy” and of “Business and industry demand” as external drivers is not surprising, as the first is well documented, for instance by the existence of national internationalization policies in many countries, and the second by the needs of business and industry for graduates ready for the global job market, it is more complicated to find an explanation for the growing importance of “Demand from foreign higher education institutions”. It might point to the fact that internationalization has become a priority in many HEIs around the world and that HEIs are feeling peer-pressure to internationalize in order not to be left out of the global higher education community.

The most notable difference between the 6<sup>th</sup> and 5<sup>th</sup> editions is the growth in importance of “National and international rankings” both at global level and in some specific regions. This could be explained by the fact that HEIs prioritise rankings to enhance their institutional reputation, attract talent (both academic and student) and maintain competitiveness.

In the 6<sup>th</sup> edition, a couple of external key drivers were newly introduced, and both have remarkable significance: “Global policies/agendas (including UN Agenda 2030)” and “Need to find solutions for global challenges.” These additions were made to capture the evolving landscape of internationalization and to reflect the increasing importance of global cooperation and addressing global issues. The rationale behind why HEIs may have prioritised these drivers might reflect the recognition among HEIs of the importance of aligning with global initiatives, conducting research to address pressing global issues, and contributing to sustainable development. They signify HEIs’ commitment to global cooperation, social responsibility, and preparing students to tackle complex challenges in a rapidly changing world.

Looking at changes since the 5<sup>th</sup> Global survey for each region is slightly more complex. However, there are some notable differences between the two surveys. For instance, in the 5<sup>th</sup> edition, “Business and industry demand” was an important external driver in all regions with the exception of North America. Interestingly, in the 6<sup>th</sup> Global Survey, the situation is reversed, “Business and industry demand” is the most important external driver in North America, while it lost relative importance in all other regions.

In the 5<sup>th</sup> Global Survey, “Government policy” topped the list in three regions (Asia & Pacific, Europe and Latin America & the Caribbean), and it was listed as third most important in Africa & the Middle East. Only in North America was it not ranked among the top three. In the 6<sup>th</sup> Global Survey, this is no longer the most important in any region, even though it is considered of high importance across regions and especially in Asia & Pacific, Europe, Sub-Saharan Africa, and North Africa & the Middle East. The decreased relative importance of “Government policy” is not easy to interpret or explain, especially in Latin America & the Caribbean where it went from being the top external driver to being an average one.

One possible explanation for this change is the introduction of the driver “Global policies/agendas (including UN Agenda 2030)” in the 6<sup>th</sup> edition. This addition clarified the role of global policies on a broader scale. It is speculated that in the 5<sup>th</sup> global survey, the significance of these policies might have been categorised by respondents under “Government policy”.

“Demand from foreign higher education institutions” was the most important external driver for African HEIs in the previous survey. Interestingly, in the 6<sup>th</sup> Global Survey, this external key driver



remains significant not only in Sub-Saharan Africa and North Africa & the Middle East, but even more so in Europe and Latin America & the Caribbean where it becomes the most important. Only in North America does its importance seem to be decreasing. On the other hand, two of the three most important key external drivers in North America in the 5<sup>th</sup> edition, “Need to generate revenue” and “Demographic trends” remain the same.

While the decline in the importance of “Demand from foreign higher education institutions” in Sub-Saharan Africa appears to be more a result of the increasing significance of other drivers rather than an actual reduction in its importance, explaining the increased importance of this driver in other regions is more challenging.

In the 5<sup>th</sup> Global Survey “National and international rankings” was the most important external driver in the Middle East and second in Africa. Even if this has changed for these two regions in the 6<sup>th</sup> edition, it remains the highest external driver in the regions Sub-Saharan Africa and North Africa & the Middle East. It also became the most important in Asia & Pacific, whereas it was the second most important in the 5<sup>th</sup> edition.

## Benefits of internationalization

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Internationalization of higher education is not a goal in itself but a means to an end. HEIs around the world internationalize and engage with other HEIs across borders because they believe the process can be beneficial. However, the benefits of internationalization can be of multiple natures and it is interesting to explore which are the most significant for HEIs.

Before discussing the results, it is important to note that in the 6<sup>th</sup> Global Survey, this question has been slightly modified since previous editions. Instead of ranking choices, respondents were asked to select, from a predefined list, up to three significant potential institutional benefits associated with internationalization.

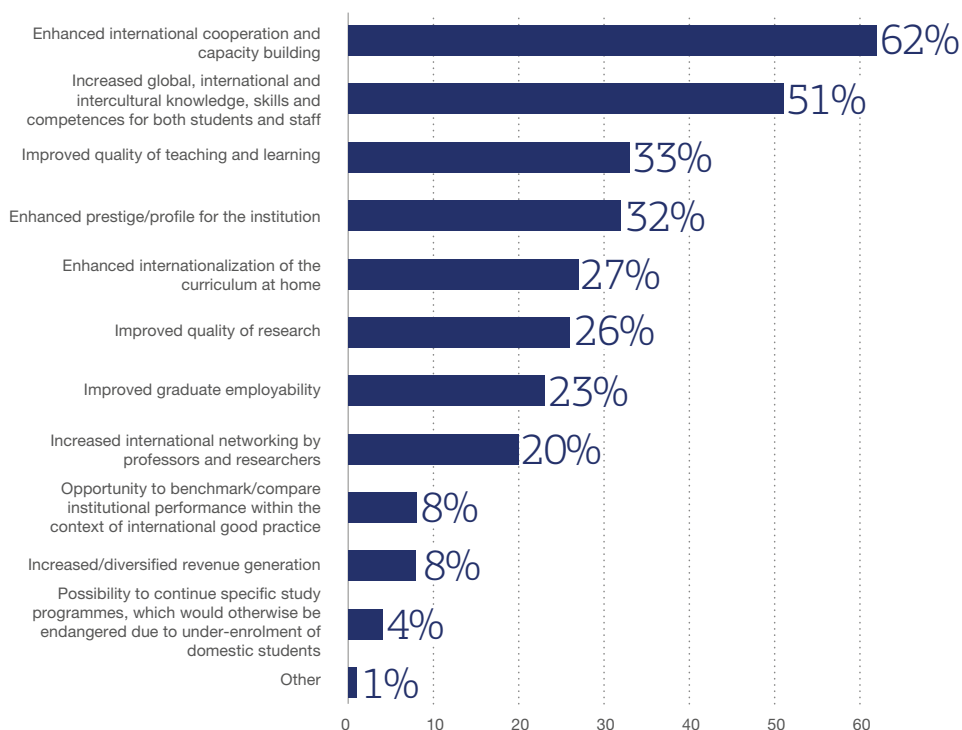
The reasons for this change, which was applied to all questions ranked in the 5<sup>th</sup> Global Survey, is that from the analysis of duplicated replies in that edition, it became clear that the order of priority in ranked questions was completely subjective, while the selection of answers was more objective. Thus, the decision to move away from ranked questions and to transform them into “select up to three”.

As depicted in [Figure 25](#), nearly two-thirds (62%) of respondents identified “Enhanced international cooperation and capacity building” as the foremost potential institutional benefit of internationalization. Fifty-one percent emphasised the importance of “Increased global, international, and intercultural knowledge, skills, and competences for both students and staff.”

These two benefits are the only ones chosen by the majority of HEIs and no clear third benefit emerge from the given options, as comparable percentages of HEIs selected benefits such as “Increased quality of teaching and learning” (33%), “Enhanced prestige/profile of the institution” (32%), “Enhanced internationalization of the curriculum at home” (27%), and “Improved quality of research” (26%) ([Figure 25](#)).

**Figure 25**

Most significant institutional benefits of internationalization



### Regional and private vs. public analysis

There are no major differences between private and public HEIs as to the most important benefits. Only “Increased global, international and intercultural knowledge, skills and competences for both students and staff” seems to be slightly more important for private HEIs (54% vs. 49%).

In the regional analysis, with the exception of North America, “Enhanced international cooperation and capacity building” stands out as the most important benefit with the majority of respondents selecting it, especially in North Africa & the Middle East (80%); in North America, only 42% opted for this, making it the third most common benefit in the region.

“Increased global, international and intercultural knowledge, skills and competences for both students and staff” emerges as the most important benefit in North America at 60% and the second major benefit in Latin America & the Caribbean and Asia & Pacific, selected by a majority of HEIs (61% and 55% respectively). In Europe it is also the second most important benefit, but selected only by just under half of HEIs (49%). However, in Sub-Saharan Africa and North Africa & the Middle East, it is clearly not one of the most significant benefits, as it is selected only by 30% and 28% of HEIs respectively in those regions.

It is noteworthy that in Latin America & the Caribbean, “Increased global, international and intercultural knowledge, skills and competences for both students and staff” and “Enhanced international cooperation and capacity building” hold equal significance, both selected by 61% of HEIs.

No other benefit is selected by a majority of HEIs in any region and the only other significant result to be reported is that “Increased/diversified revenue generation” is the second most significant benefit in North America, selected by 44%. This is not surprising considering the importance of the economic rationale for internationalization in North America; we could have expected this to have been higher in the region. Overall, North America stands out due to its significant variation when compared to other regions and the global average (Table 10).

Table 10

Top three most important benefits of internationalization	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Enhanced international cooperation and capacity building	73%	58%	61%	72%	80%	42%	62%
Increased global, international and intercultural knowledge, skills and competences for both students and staff	55%	49%	61%	30%	28%	60%	51%
Enhanced internationalization of the curriculum/internationalization at home	21%	28%	27%	21%	25%	37%	27%
Enhanced prestige/profile for the institution	39%	37%	31%	19%	22%	26%	32%
Improved graduate employability	19%	22%	22%	23%	32%	21%	23%
Improved quality of research	24%	27%	20%	37%	39%	23%	26%
Improved quality of teaching and learning	27%	37%	31%	42%	36%	21%	33%
Increased international networking by professors and researchers	13%	17%	28%	21%	16%	12%	20%
Increased/diversified revenue generation	8%	6%	4%	12%	3%	44%	8%
Opportunity to benchmark/compare institutional performance within the context of international good practice	16%	8%	5%	14%	13%	0%	8%
Other	0%	2%	0%	2%	1%	5%	1%
Possibility to continue specific study programmes, which would otherwise be endangered due to under-enrolment of domestic students	0%	7%	4%	2%	1%	7%	4%

### Comparison with previous Global Survey results

Even if the nature of the question was changed from previous editions of the global surveys, it is still possible to compare the results.

The 6<sup>th</sup> IAU Global Survey confirms even more clearly the predominance of “Enhanced international cooperation and capacity building”, whose importance has grown over time, as it was ranked third most important benefit in the 3<sup>rd</sup> and 4<sup>th</sup> editions of the survey, rising to the most important in the 5<sup>th</sup> edition and confirming its position, by a significant margin, in the 6<sup>th</sup> Global Survey.

On the other hand, “Increased global, international and intercultural knowledge, skills and competences for both students and staff” emerges as the second most important benefit

and while the wording of this benefit is not exactly the same, and thus cannot be directly compared to previous editions, it does bear some resemblance to its predecessor (increased international awareness of/deeper engagement with global issues by students). The latter was not among the most important benefits in the 5<sup>th</sup> edition, it held the top position in the 3<sup>rd</sup> and 4<sup>th</sup> editions.

The importance of “Improved quality of teaching and learning” seems to remain stable over time, as this was ranked the second most important benefit in all previous surveys except in the 2<sup>nd</sup> Global Survey, and in the 6<sup>th</sup> Global Survey, it is the third most important benefit. However, the way the question was asked in the 6<sup>th</sup> Global Survey reveals that this was selected only by one third of institutions (Table 11).

**Table 11**

Rank	2 <sup>nd</sup> Global Survey	3 <sup>rd</sup> Global Survey	4 <sup>th</sup> Global Survey	5 <sup>th</sup> Global Survey	6 <sup>th</sup> Global Survey
1	More internationally orientated student and staff	Increased international awareness of students	Increased international awareness of/deeper engagement with global issues by students	Enhanced international cooperation and capacity building	Enhanced international cooperation and capacity building
2	Improved academic quality	Strengthened research and knowledge production	Improved quality of teaching and learning	Improved quality of teaching and learning	Increased global, international and intercultural knowledge, skills and competences for both students and staff
3	Strengthened research and knowledge production	Enhanced international cooperation and solidarity	Enhanced international cooperation and capacity building	Several different benefits were identified as third most important	Improved quality of teaching and learning

This is a noteworthy result, indicating a potential establishment of a shift over the past decade, where “Enhanced international cooperation and capacity building” seems to be taking charge and establishing itself as a prominent aspect in the landscape of internationalization.

The established shift in perception can be interpreted in multiple ways. One explanation might be that the sustained significance of “Enhanced international cooperation and capacity building” reflects HEIs’ concerns with global inequalities, viewing internationalization as a tool for narrowing gaps between institutions, communities, and countries. It might also indicate that internationalization contributes positively to both educational quality and societal advancement. This is reinforced by the importance of “Increased global, international and intercultural knowledge, skills and competences for both students and staff” and might further signify that internationalization is not only seen as a means to improve educational quality, but also as a significant contributor to societal progress.

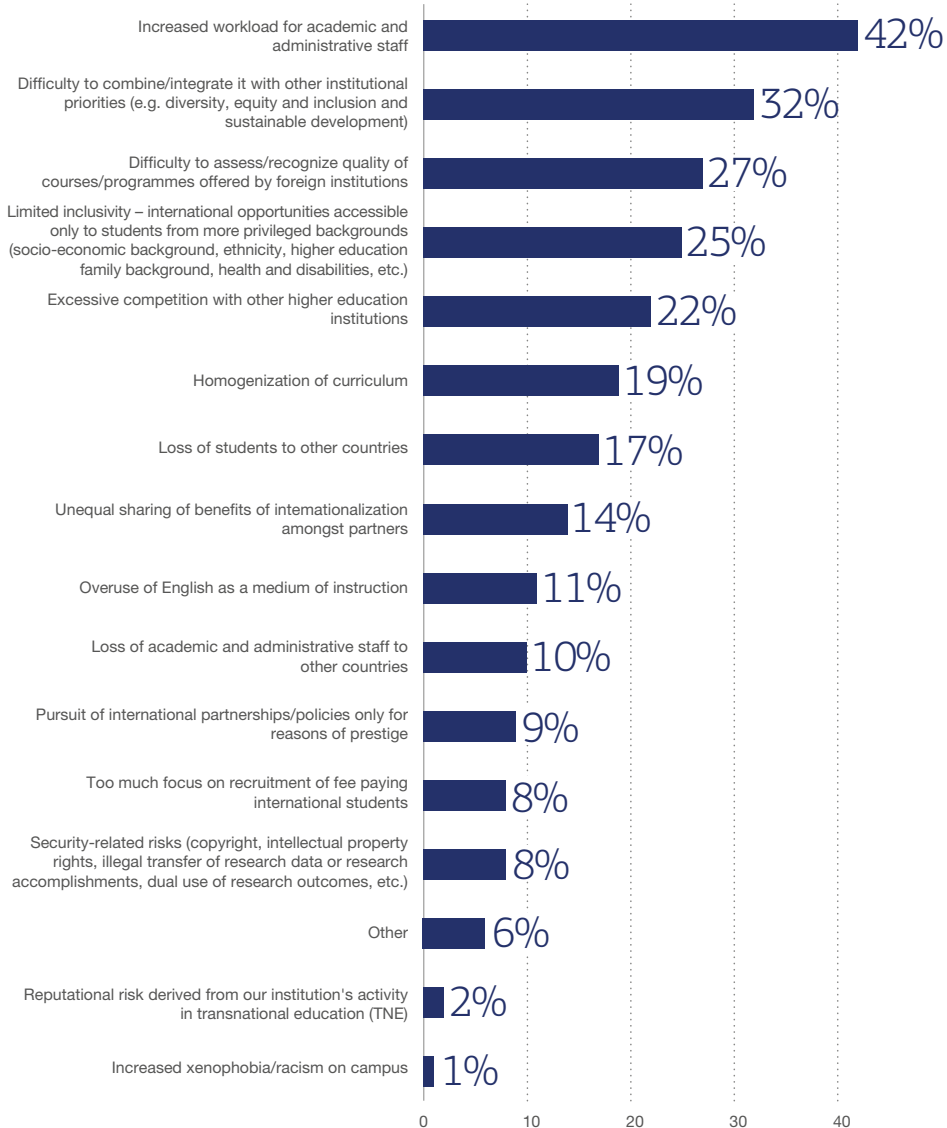
## Potential institutional risks of internationalization

Internationalization, as every process, comes with potential risks. Respondents were asked, as in previous IAU surveys, to identify the three most significant potential institutional risks of internationalization from among a predefined list of options. However, as was the case for the question on benefits, in the 6<sup>th</sup> Global Survey, the question was changed from ranking the top three choices, to selecting, from a predefined list, up to three significant institutional risks associated with internationalization.

The most important result is that no one risk was highlighted by the majority of HEIs. The most common risk was “Increased workload for academic and administrative staff” and this was selected by only 42% of respondents (Figure 26).

**Figure 26**

Most significant potential institutional risks of internationalization



This result might be surprising, but it means that there is no one common institutional risk for HEIs at global level, but a variety of risks which might have varying levels of importance at different HEIs.

This makes the regional analysis interesting to see if the location of HEIs has a role to play in the importance of institutional risks of internationalization.

## Regional and private vs. public analysis

While there are no significant differences between private and public HEIs, the regional analysis reveals significant variations in perceptions of potential institutional risks associated with internationalization.

“Increased workload for academic and administrative staff” does emerge as the main concern in Europe, where it is chosen by the majority of HEIs (61%) and in North America, where it is chosen by slightly more than half of HEIs (51%). However, in all other regions, this risk is considered much lower, with percentages ranging between 21% in Sub-Saharan Africa and 35% in Asia & Pacific.

Europe and North America are also the only two regions where a single clear risk emerges as being the most important. In all other regions there was no one risk that emerged as being selected by the majority of HEIs, underlying the fact that the variance already seen at global level is present also within these regions and due to factors other than the regional geographical location. There might be national specificities or even institutional specificities, but it is not possible to capture these in the 6<sup>th</sup> IAU Global Survey and they deserve further research.

Following on from the above it might be interesting to have a look at how the different risks distribute themselves in the different regions.

“Difficulty to combine/integrate it with other institutional priorities (e.g. diversity, equity, and inclusion and sustainable development)” is the second most common risk at global level (even if selected only by 32% of HEIs) but first in Sub-Saharan Africa, where it shares the top spot (42% of HEIs) with “Homogenization of curriculum”, which in all other regions is selected by a quarter or less of HEIs.

“Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions” is the third most significant potential risk globally (even if selected by only 27% of HEIs). However, it takes the top spot in Asia & Pacific at 40%, while in other regions it is among the top three risks selected by a quarter or a third of HEIs, except in North America where it was selected by only 19% of HEIs.

“Limited inclusivity - international opportunities accessible only to students from more privileged backgrounds” is only the fourth most significant potential risk globally (selected by a quarter of HEIs), but ranks as the top risk in Latin America & the Caribbean, at 41% of HEIs. It was selected by 35% of HEIs in Asia & Pacific, while in other regions it ranges between 12% and 25%.

It is interesting to note that “Too much focus on recruitment of fee-paying international students,” was selected by 44% of North American HEIs, but no more than 10% in any other region; yet another example of the specificities of North America where much importance is placed on attracting fee-paying international students.

Finally, it is worth mentioning that “Unequal sharing of benefits of internationalization amongst partners,” is a significant risk for about a quarter of HEIs in Latin America & the Caribbean and Sub-Saharan Africa, a percentage which is more than double that in all other regions (Table 12).

Table 12

The most important potential risk of internationalization	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Increased workload for academic and administrative staff	35%	61%	26%	21%	30%	51%	42%
Difficulty to combine/integrate it with other institutional priorities (e.g. diversity, equity and inclusion and sustainable development)	27%	27%	36%	42%	35%	35%	32%
Homogenization of curriculum	11%	12%	26%	42%	20%	2%	19%
Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions	40%	25%	25%	33%	32%	19%	27%
Limited inclusivity - international opportunities accessible only to students from more privileged backgrounds (socio-economic background, ethnicity, higher education family background, health and disabilities, etc.)	35%	12%	41%	16%	17%	23%	25%
Unequal sharing of benefits of internationalization amongst partners	8%	8%	22%	26%	10%	9%	14%
Excessive competition with other higher education institutions	29%	22%	16%	23%	35%	28%	22%
Loss of academic and administrative staff to other countries	8%	10%	6%	19%	23%	2%	10%
Pursuit of international partnerships/policies only for reasons of prestige	2%	7%	13%	12%	10%	5%	9%
Loss of students to other countries	16%	18%	17%	9%	22%	12%	17%
Security-related risks (copyright, intellectual property rights, illegal transfer of research data or research accomplishments, dual use of research outcomes, etc.)	8%	11%	2%	9%	7%	16%	8%
Overuse of English as a medium of instruction	2%	12%	14%	7%	6%	5%	11%
Reputational risk derived from our institution's activity in transnational education (TNE)	2%	1%	1%	5%	1%	9%	2%
Too much focus on recruitment of fee-paying international students	10%	9%	3%	5%	3%	44%	8%
Increased xenophobia/racism on campus	3%	1%	0%	2%	3%	0%	1%
Other	5%	5%	6%	2%	6%	9%	6%

### Comparison with the 5<sup>th</sup> Global Survey results

Despite the slight variation in the way the question was presented in the 6<sup>th</sup> Global Survey, it is still possible to make some comparisons with the results obtained from the 5<sup>th</sup> Global Survey, at least for what concerns the relative order of importance of risks.

At the global level, the top two risks in the 6<sup>th</sup> Global Survey “Increased workload for academic and administrative staff” and “Difficulty to combine/integrate it with other institutional priorities

(e.g. diversity, equity and inclusion and sustainable development)” are newly introduced, so no comparison with previous editions is possible. Concerning the other most important risks, they are the same as in the 5<sup>th</sup> Global Survey, albeit in a different order.

In the 6<sup>th</sup> Global Survey, “Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions” is the third most significant potential risk, while in the 5<sup>th</sup> edition, it was the second most important risk.

The wording of the top risk in the 5<sup>th</sup> Global Survey, “International opportunities accessible only to students with financial resources”, was changed in the 6<sup>th</sup> Global Survey to “Limited inclusivity - international opportunities accessible only to students from more privileged backgrounds”. Even if a direct comparison is not possible, it is interesting to note that this risk is now only the fourth most important.

At regional level, “Too much focus on recruitment of fee-paying international students” remains the second most important risk in North America. Another sign of an internationalization process that, in North America, is still focused to a large extent on student mobility and the attraction of fee-paying international students.

In the 5<sup>th</sup> Global Survey, “Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions” was ranked number one in Europe, whereas in the 6<sup>th</sup> Global Survey, it dropped to third place, selected by only a quarter of European HEIs. At the same time, it rose from third to first place in Asia & Pacific. This result suggests that efforts in Europe might have mitigated the issue to some extent, whereas recognition remains a persistent challenge in the Asia & Pacific region; and its importance could also have increased due to other risks decreasing, for example “Excessive competition with other higher education institutions”, which went from being the top ranked risk to the fourth, and selected by only 29% of HEIs. Now, this risk stands out as one of the highest potential risks in North Africa & the Middle East.

To summarise, comparing the results with the 5<sup>th</sup> Global Survey is challenging because of the newly-introduced risks and change in the way the question was formulated. However, the comparison reveals a diverse and dynamic situation at the regional level.

## Societal risks associated with current trends in internationalization

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HEIs do not exist in a vacuum, but are part of society and one pillar of their mission is to serve that society. Everything that HEIs do has an impact on society and at the same time, society influences HEIs, their priorities and activities. It is therefore possible that internationalization, as it is currently implemented, brings societal risks, and HEIs were asked to identify up to three of the most significant potential societal risks.

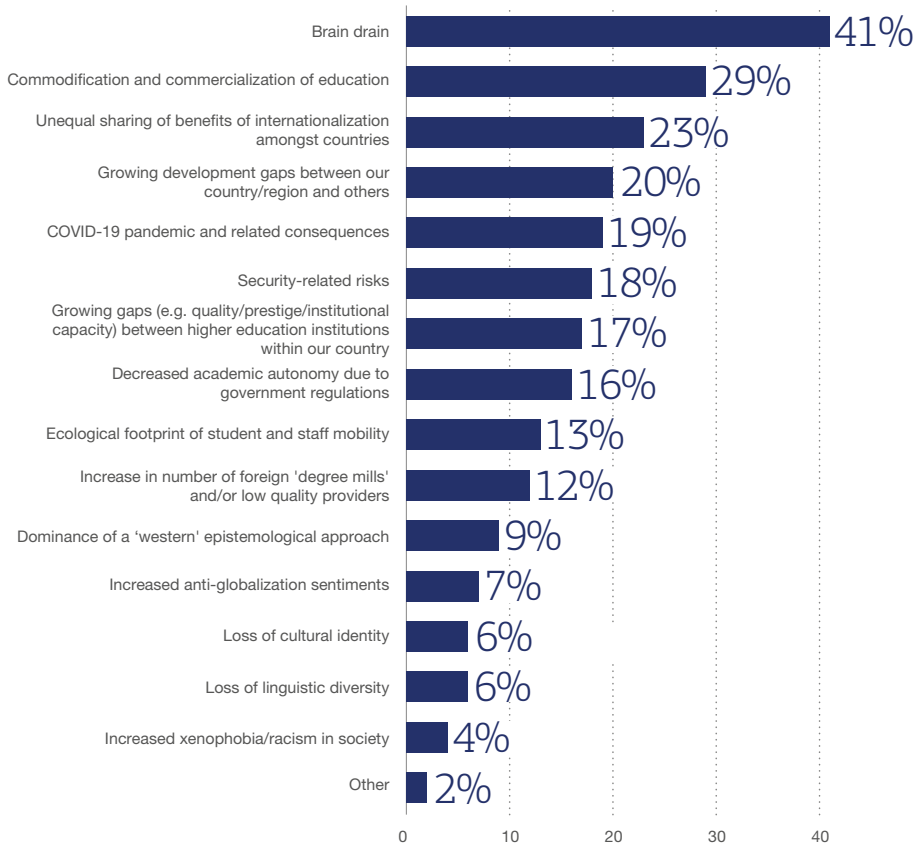
As was the case for institutional risks, for societal risks, no one risk was selected by a majority of HEIs, depicting a very diverse landscape of societal risks around the world.

The most common risk is “Brain drain”, and although this was identified by only 41% of HEIs, it is still clearly ahead of the second risk, “Commodification and commercialization of education” selected by only 29% of respondents (Figure 27).



**Figure 27**

Most significant potential societal risks associated with current trends in internationalization



The third most significant potential concern is the “Unequal sharing of benefits of internationalization amongst countries.” While slightly higher in percentage compared to “Growing development gaps between our country/region and others” and “Growing gaps between higher education institutions within our country”, all three risks revolve around inequality. Combining their percentages underscores the overarching risk of internationalization exacerbating disparities among institutions within a country and between countries.

This alarming signal regarding the relationship between internationalization and inequality emphasises the crucial need for reflection among HEIs and policy-makers. As discussed earlier, it underscores the importance of internationalization serving as a tool to combat and narrow inequalities between individuals, institutions, communities, and countries, rather than exacerbating them.

### Regional and private vs. public analysis

While there are no substantial differences between private and public HEIs, the regional analysis helps somehow understand the diversity of the importance of societal risks around the world, at least in some regions. This is clearly the case for Sub-Saharan Africa, where “Brain drain” is clearly the most important risk, selected by three-quarters of HEIs.

“Brain drain” is the most significant potential societal risk across all other regions except North America, which stands out with a notably lower percentage of 5% for this risk, while in other regions percentages are between 36% and 46%. A possible explanation of this is that “Brain drain” depends more on countries rather than regions and that in each region, except sub-Saharan Africa and North America, there are countries for which brain drain is a real risk and others for which it is not.

This remarkable difference of Sub-Saharan Africa underscores the pronounced impact and heightened concern of “Brain drain” in this region, requiring targeted measures to address this significant risk.

As can be seen in Table 13, “Commodification and commercialization of education” is the most common risk in North America selected by almost half of HEIs (49%). This risk is present also in other regions, but is much less common (16% in Sub-Saharan Africa and 37% in Asia & Pacific). It is not surprising that “Commodification and commercialization of education” is the

**Table 13**

The most significant potential societal risks associated with current trends of internationalization	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Brain drain	45%	36%	45%	74%	46%	5%	41%
Commodification and commercialization of education	37%	25%	32%	16%	29%	49%	29%
Decreased academic autonomy due to government regulations	8%	15%	11%	40%	32%	14%	16%
Growing development gaps between our country/region and others	13%	11%	27%	28%	39%	9%	20%
Loss of cultural identity	5%	5%	4%	21%	10%	0%	6%
Dominance of a ‘western’ epistemological approach	19%	5%	10%	19%	4%	9%	9%
COVID-19 pandemic and related consequences	29%	20%	18%	16%	16%	16%	19%
Growing gaps (e.g. quality/prestige/institutional capacity) between higher education institutions within our country	23%	17%	14%	14%	20%	14%	17%
Unequal sharing of benefits of internationalization amongst countries	15%	14%	42%	14%	19%	14%	23%
Security-related risks	13%	16%	23%	9%	13%	21%	18%
Increase in number of foreign ‘degree mills’ and/or low-quality providers	8%	10%	16%	7%	10%	21%	12%
Ecological footprint of student and staff mobility	3%	24%	4%	5%	7%	14%	13%
Increased anti-globalization sentiments	6%	7%	3%	5%	1%	35%	7%
Increased xenophobia/racism in society	5%	5%	2%	5%	1%	14%	4%
Loss of linguistic diversity	2%	10%	2%	5%	1%	12%	6%
Other	5%	3%	1%	0%	1%	2%	2%

most common societal risk in North America as this is the region where education has been commodified the most. It is also not surprising that it was selected only by half of HEIs as probably the other half do not consider it as a risk, as they could have benefitted by the process and they might think that society has also benefited. This result hints at a split between different types of HEIs in North America, which is also not surprising, but worth a reflection on the risk of increasing inequalities.

This risk of increasing inequality is also visible in Latin America & the Caribbean where 42% of HEIs selected “Unequal sharing of benefits of internationalization amongst countries.

Finally, it is worth noting the relative importance of some potential societal risks, in some regions: “Ecological footprint of student and staff mobility” was selected by 24% of HEIs in Europe but by much lower percentages of HEIs in all other regions. Similarly, “Anti-globalization sentiments” was identified by 35% of North American HEIs, with “Increased xenophobia/racism in society” reported at 14% in the region, while both these risks are negligible in all other regions. The relative importance of these risks in Europe and North America likely stems from the current socio-political climates within each respective region (Table 13).

### Comparison with the 5<sup>th</sup> Global Survey results

The comparison with the results of the 5<sup>th</sup> Global Survey confirms “Brain drain” as the most important societal risk, especially in some regions of the world. The different formulation of the question in the 6<sup>th</sup> edition adds complexity to making a direct comparison. However, this alteration aids in understanding the level of importance of this risk in each region. For instance, while in the 5<sup>th</sup> edition, one could only conclude that “Brain drain” was the most significant risk in all regions except North America, the 6<sup>th</sup> edition clearly demonstrates the disparity in importance among regions. In Sub-Saharan Africa, this risk notably affects the majority of HEIs, whereas, in all other regions, it remains the primary concern, but impacts fewer than half of the HEIs.

The same is true for the second most common risk of “Commodification and commercialization of education programmes”, while in the 5<sup>th</sup> edition this risk seemed to have a comparable if not higher importance than “Brain drain”, it becomes clear in the 6<sup>th</sup> edition that this is not the case and that “Brain drain” is a more common risk in all regions but North America, where the opposite is true.

The risk of “Unequal sharing of benefits of internationalization amongst countries” remains consistent in third position in both editions.

### Comparison with previous Global Survey results

It is interesting to compare both institutional and societal risks for the different editions of the Global Survey, keeping in mind that the division between institutional and societal risks was introduced only with the 4<sup>th</sup> Global Survey, and that questions were worded differently in the 6<sup>th</sup> edition.

As can be seen from Table 14, although clearly losing first place in the 6<sup>th</sup> Global Survey to “Brain Drain”, “Commodification and commercialization of education programmes” remains an important societal risk and has been considered such since the 2<sup>nd</sup> Global Survey.

This means that concerns that internationalization will reinforce the trend of higher education becoming a commodity and losing its “humanistic” aspects (preparation of responsible citizens, service to society, etc.) remains relevant.

“Brain drain” is clearly the most common societal risk in the 6<sup>th</sup> edition after having re-emerged among the top three in the 5<sup>th</sup> Global Survey and having been absent in the 4<sup>th</sup> edition. This disappearance and reappearance is challenging to explain and was attributed to the majority of respondents in the 4<sup>th</sup> edition being HEIs in the USA and Europe, particularly Western Europe, where “Brain drain” is not a major concern. However, it is important to note that in the 5<sup>th</sup> Global Survey, “Brain drain” was identified as the top societal risk in Europe as well. This trend continues in the 6<sup>th</sup> edition, with “Brain drain” being recognized as the leading societal risk in all regions, notably Sub-Saharan Africa with a significant percentage of 74%. North America remains the exception, characterised by a markedly low percentage. Considering these variations is essential in assessing the prominence of “Brain drain” as a societal risk.

In the previous editions, concerns with inequality ranked as the top institutional risks in the 4<sup>th</sup> and 5<sup>th</sup> Global Surveys. In the 6<sup>th</sup> edition, while still significant, these concerns slightly decrease and lose the top spots to “Increased workload for academic and administrative staff” and “Difficulty to combine/integrate it with other institutional priorities (e.g., diversity, equity and inclusion, and sustainable development).” However, these institutional risks were newly introduced in the 6<sup>th</sup> edition, making comparisons with previous editions impossible.

Finally, it is important to note that the risk of “Increase in number of foreign ‘degree mills’ and/or low-quality providers” has not been present in the top three risks since the 3<sup>rd</sup> edition, and in the 6<sup>th</sup> edition is of relative importance only in North America (21% of HEIs). This result is encouraging, as it might be a sign of a stronger quality culture as well as oversight mechanisms (Table 14).

Table 14

Rank	2 <sup>nd</sup> Global Survey (Risk)	3 <sup>rd</sup> Global Survey (Risk)	4 <sup>th</sup> Global Survey (HEI Risk)	4 <sup>th</sup> Global Survey (Societal Risk)	5 <sup>th</sup> Global Survey (HEI Risk)	5 <sup>th</sup> Global Survey (Societal risk)	6 <sup>th</sup> Global Survey (HEI risk)	6 <sup>th</sup> Global Survey (Societal risk)
1	Commodification and commercialization of education programmes	Commodification and commercialization of education programmes	International opportunities accessible only to students with financial resources	Commodification and commercialization of education programmes	International opportunities accessible only to students with financial resources	Commodification and commercialization of education programmes	Increased workload for academic and administrative staff	Brain drain
2	Increase in number of foreign degree mills and/or low-quality providers	Brain drain	Difficulty regulating locally the quality of foreign programmes offered	Unequal sharing of benefits of internationalization among partners	Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions	Brain drain	Difficulty to combine/integrate it with other institutional priorities (e.g. diversity, equity and inclusion and sustainable development)	Commodification and commercialization of education programmes
3	Brain drain	Increase in number of foreign degree mills and/or low-quality providers	Excessive competition among higher education institutions	Growing gaps (e.g. quality/prestige/institutional capacity) among higher education institutions within your country	Excessive competition with other higher education institutions	Unequal sharing of benefits of internationalization amongst countries	Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions	Unequal sharing of benefits of internationalization amongst countries

## Internal obstacles/challenges to internationalization

In order to implement internationalization, HEIs are likely to face obstacles and challenges, both internally and externally. HEIs were asked, in two separate questions, to identify a maximum of three most important internal and external obstacles from a number of options.

As Figure 28 shows, “Insufficient financial resources” is identified as a major internal obstacle for internationalization by HEIs, selected by 60%. This finding might not come as a surprise, but what is perhaps more unexpected is that none of the other obstacles/challenges was selected by more than one quarter of HEIs, depicting a very varied landscape of internal obstacles, which no doubt depends on many different factors.

**Figure 28**

Most important internal obstacles/challenges to advancing internationalization



The second, third, fourth and fifth most important internal obstacles identified by respondents are very close to one another in terms of importance, with “Administrative/bureaucratic difficulties (e.g. no credit transfer; different academic years)” at 25%, “Competition priorities at institutional level” at 24%, “Lack of knowledge of foreign languages” at 22%, and “Limited student participation due to constraints (including financial ones)” at 20%.

Certain other obstacles/challenges are similar in nature and it is interesting to analyse them by grouping them together.

For example, both “Limited institutional leadership/vision” and “No strategy/plan to guide the process” relate to leadership and strategic planning at the institutional level, accounting for a combined percentage of 22% (10% and 12%, respectively). The combined percentages of these obstacles underscore the common theme of insufficient guidance and vision for internationalization efforts within HEIs, highlighting the importance of addressing this challenge through clear direction and strategic frameworks to enable a successful internationalization.

“Limited student interest” (6%), “Limited student participation due to constraints (including financial ones)” (20%), “Too rigorous/inflexible curriculum to participate in international activities, including student mobility” (9%), and “Lack of knowledge of foreign languages by students” (22%) can be grouped into a student-related category of obstacles, resulting in a combined percentage of 57%. These obstacles collectively underscore the key factors that impact student engagement in internationalization efforts, with the potential to foster greater interest, remove participation barriers, promote curriculum flexibility, and enhance language proficiency among students.

Similarly, “Limited capacity/expertise of academic staff (teachers and researchers)” (6%), “Limited involvement/interest of academic staff (teachers and researchers)” (9%) and “Lack of knowledge of foreign languages by academic staff” (15%) could be grouped into an academic staff-related category, accounting for a combined percentage of 30%. The combined percentages of these obstacles/challenges suggest that the low levels of knowledge, interest, readiness and capacity of academic staff members to implement internationalization are also important obstacles/challenges to overcome.

## Regional and private vs. public analysis

“Insufficient financial resources” is clearly the most important internal obstacle/challenge for both private and public HEIs, the only one chosen by the majority of HEIs. All other obstacles/challenges were selected by less than 30% of HEIs. Despite the small percentages it is still interesting to note that private HEIs give more importance to student-related obstacles/challenges (“Lack of knowledge of foreign languages by students” and “Limited student participation due to constraints (including financial ones)”) while public HEIs give more importance to institutional-related obstacles/challenges (“Administrative/bureaucratic difficulties (e.g. credit transfer limitations; different academic years)” and “Competing priorities at institutional level”).

The regional analysis shows that “Insufficient financial resources” is the primary internal obstacle/challenge in all regions except North America, where it is a close second behind “Competing priorities at institutional level” (53% vs. 51%). “Insufficient financial resources” are a particularly important obstacle/challenge especially in Sub-Saharan Africa (77%) and Latin America & the Caribbean (70%).

In all regions except North America all other obstacles/challenges were selected by less than half of HEIs, showing a very diverse landscape of obstacles/challenges inside each region. However, it is interesting pointing out some regional specificities.

North America is the region that diverges the most from the global average. Other than being the only region where “Competing priorities at institutional level” is the most important obstacle/challenge, it is also the region where “Insufficient international opportunities to meet stakeholder interest/demand”, “Lack of knowledge of foreign languages by students and academic and administrative staff”, and “Limited student interest” are not considered being obstacles/challenges by any HEI.

If the absence of language barriers can be easily explained by the fact that all HEIs in North America have internationally recognised and widely used languages (English and, to a lesser extent, French), it is interesting to note how HEIs in North America believe they provide sufficient international opportunities and that students are interested in internationalization. The latter is particularly surprising as it might be an overly optimistic perception on the part of HEIs. It might be interesting to compare this finding with student perspectives.

It is also worth mentioning the importance of “Limited institutional leadership/vision” (26%), which, combined with “No strategy/plan to guide the process” (16%), signals a lack of leadership commitment and guidance at 42% of North American HEIs. The distinct pattern of North America underlines the unique challenges and opportunities that HEIs in this region may face in their pursuit of internationalization.

In comparison, at the global level, where “Administrative/bureaucratic difficulties (e.g. credit transfer limitations; different academic years)” stood as the second most important external obstacle/challenge with 25%, Asia & Pacific and North Africa & the Middle East exhibit remarkably lower percentages at 16% and 12%, respectively.

The third obstacle with the highest percentage at global level (24%), “Competing priorities at the institutional level,” shows very similar percentages across all regions, except in Latin America & the Caribbean, where it is quite low at 13%, and in North America, where as mentioned above it is the most significant obstacle with 53%.

In Latin America & the Caribbean, “Lack of knowledge of foreign languages” is an important obstacle/challenge, with higher percentages than any other region for academic staff and students, especially the latter at 38% of HEIs and is the second most important obstacle/challenge in the region. However, interestingly enough, among administrative staff in the region, this obstacle appears to be lower or at least not seen as important as the two previous ones. Additionally, “Limited student participation due to constraints (including financial ones)” is important at 27% of HEIs in this region, making it the third most important.

It is worth noting that a similar percentage of HEIs choosing “Limited student participation due to constraints (including financial ones)” (29%) is also observed in Asia & Pacific, making it the second most important in that region, whereas the percentage of “Lack of knowledge of foreign languages by students” is much lower (13%). This may suggest that while the two obstacles may or may not directly correlate, there could be factors other than language skills influencing student engagement in internationalization in both regions.

Europe presents an interesting case, standing out with the lowest percentage of “No strategy/plan to guide the process” at 7% and “Limited institutional leadership/vision” at 5%. However, intriguingly, the relevance of “Administrative/bureaucratic difficulties (e.g. credit transfer limitations; different academic years)” is higher here than in all other regions, reaching 32%. This

suggests that while European institutions demonstrate strong strategic planning and leadership, they encounter specific administrative challenges to their internationalization efforts. This result might seem contradictory to the fact that Europe is likely the most advanced region in terms of recognition. However, this could be attributed to the regularity with which European HEIs encounter such issues, leading them to perceive these obstacles/challenges as more significant than other regions do (Table 15).

**Table 15**

Most important internal obstacles of internationalization	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Insufficient financial resources	53%	53%	70%	77%	58%	51%	60%
Administrative/bureaucratic difficulties (e.g. credit transfer limitations; different academic years)	16%	32%	23%	26%	12%	23%	25%
Competing priorities at institutional level	23%	26%	13%	28%	28%	53%	24%
Lack of knowledge of foreign languages by students	13%	16%	38%	16%	19%	5%	22%
Limited student participation due to constraints (including financial ones)	29%	16%	27%	16%	16%	14%	20%
Lack of knowledge of foreign languages by academic staff	10%	17%	21%	5%	9%	0%	15%
Lack of or poorly resourced organisational structure/office responsible for internationalization	11%	13%	12%	14%	16%	19%	13%
No strategy/plan to guide the process	15%	7%	13%	16%	17%	16%	12%
Insufficient international opportunities to meet stakeholder interest/demand	16%	7%	9%	16%	22%	0%	10%
Limited institutional leadership/vision	15%	5%	7%	19%	19%	26%	10%
Limited involvement/interest of academic staff (teachers and researchers)	3%	14%	9%	5%	4%	5%	9%
Too rigorous/inflexible curriculum to participate in international activities, including student mobility	8%	8%	9%	12%	6%	14%	9%
International engagement is not recognized for promotion or tenure	3%	7%	8%	12%	9%	12%	8%
Lack of knowledge of foreign languages by administrative staff	8%	11%	7%	2%	3%	0%	7%
Limited student interest	3%	9%	5%	0%	7%	0%	6%
Limited capacity/expertise of academic staff (teachers and researchers)	6%	6%	5%	5%	4%	2%	6%
Limited involvement/interest of administrative staff	5%	4%	2%	2%	3%	9%	3%
Limited capacity/expertise of administrative staff	2%	5%	1%	0%	4%	7%	3%
Limited/lack of technological resources to engage in virtual internationalization opportunities	6%	3%	1%	12%	1%	2%	3%
Other	2%	5%	3%	0%	4%	5%	3%



In summary, whether the mentioned obstacles are directly correlated or not, the regional disparities and the diversity of obstacles/challenges within each region highlight the necessity for tailored strategies at the institutional level. These strategies are crucial to effectively address internal obstacles/challenges and promote successful internationalization endeavours across HEIs worldwide.

## Comparison with previous Global Survey results

These results cannot be directly compared to those of previous Global Surveys due to changes in the way the respondents were asked to identify the most important internal obstacles to internationalization. However, some comparisons can be made as to the relative importance of the different obstacles/challenges.

“Insufficient financial resources” clearly remains the main internal obstacle/challenge to internationalization, just as it was in the 5<sup>th</sup> and 4<sup>th</sup> editions.

All other obstacles/challenges were selected by a quarter or less of HEIs and the differences in percentages are so small that making any conclusions is difficult.

However, “Administrative/bureaucratic difficulties (e.g. no credit transfer; different academic years),” which in the 5<sup>th</sup> Global Survey grew in importance in comparison to the results of the 4<sup>th</sup> Global Survey, continues to be one of the most important internal obstacles/challenges also in the 6<sup>th</sup> Global Survey. Once again, this is quite surprising, as the expectation is that administration of the internationalization processes becomes easier over time, rather than more complicated, and that given the importance assigned to the process, administrative obstacles should be removed at a certain point. This result might suggest, however, that the expansion of internationalization activities is coupled with an expansion of administrative and other bureaucratic procedures.

“Lack of knowledge of foreign languages” had already been changed in the 5<sup>th</sup> Global Survey from the 4<sup>th</sup> where it was “Limited experience and expertise of Faculty and staff (including linguistic)”; in the 6<sup>th</sup> Global Survey this obstacle was divided among different institutional actors (i.e., students, and academic and administrative staff). Similarly, in the 6<sup>th</sup> Global Survey, “Limited faculty involvement/interest” was also divided between academic staff (teachers and researchers) and administrative staff.

As such, in the 5<sup>th</sup> Global Survey respondents could choose among the following options: “Lack of knowledge of foreign languages”, “Limited faculty capacity/expertise” and “Limited faculty involvement/interest”. In the 6<sup>th</sup> Global Survey, respondents could choose among the following options: “Lack of knowledge of foreign languages by academic staff,” “Lack of knowledge of foreign languages by administrative staff,” “Lack of knowledge of foreign languages by students,” “Limited capacity/expertise of academic staff (teachers and researchers),” “Limited capacity/expertise of administrative staff,” “Limited involvement/interest of academic staff (teachers and researchers),” and “Limited involvement/interest of administrative staff.”

This makes comparisons with previous editions almost impossible, but it is worth mentioning that language barriers remain relevant especially in Latin America & the Caribbean and especially for students.

Finally, it is worth mentioning that some newly added obstacles/challenges such as “Competing priorities at institutional level” were chosen by a relatively substantial percentage of HEIs (24%) compared to all other proposed obstacles/challenges.

## External obstacles/challenges to internationalization

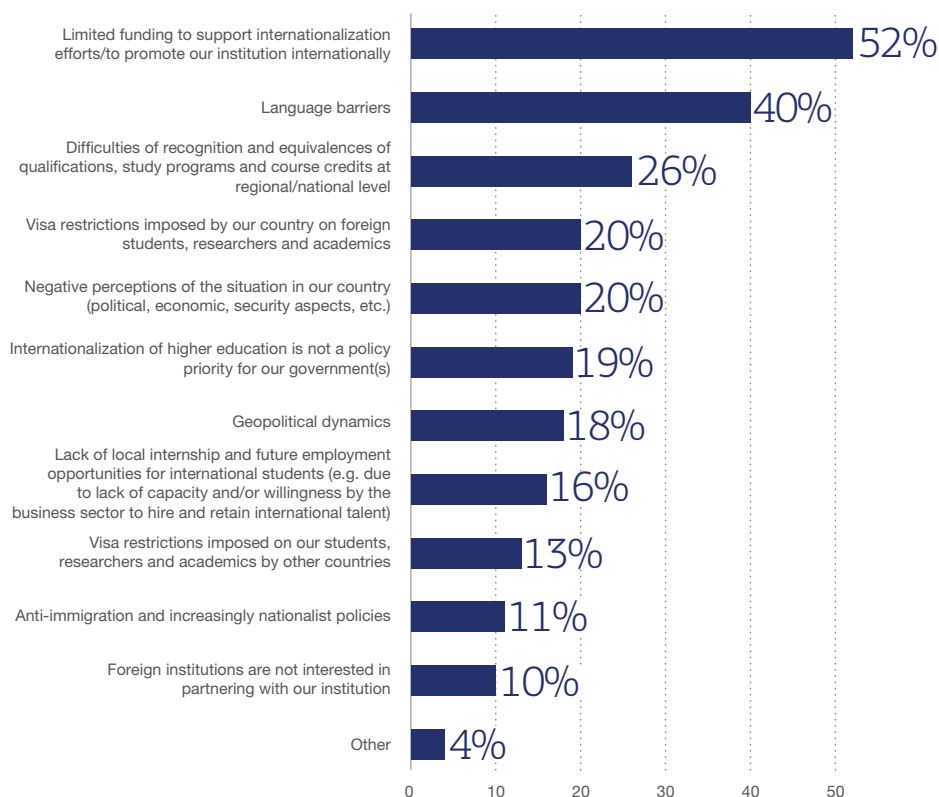
As Figure 29 depicts, “Limited funding to support internationalization efforts/to promote our institution internationally” is the most common external obstacle/challenge to internationalization, the only one chosen by slightly more than half of HEIs (52%).

As was the case for internal obstacles/challenges, all others were chosen by less than half of HEIs, depicting a quite diverse landscape in terms of external obstacles/challenges. However, the difference in percentages are bigger and “Language barriers” is undoubtedly the second most important external obstacle/challenge, chosen by 40% of respondents.

Determining the next most crucial external obstacle/challenge is more complicated, as percentages drop and there are several options over or around 20%. Nevertheless, “Difficulties of recognition and equivalences of qualifications, study programs, and course credits at regional/national level” is slightly higher than the others with 26% of HEIs (Figure 29).

**Figure 29**

Most important external obstacles/challenges to advancing internationalization



### Regional and private vs. public analysis

There are no major differences between private and public HEIs - the order of the most important external obstacles/challenges is the same. It is worth mentioning that for private HEIs none of

the proposed obstacles/challenges is common to the majority of HEIs and that both “Limited funding” and “Language barriers” seem to be more common for public than private HEIs (57% vs. 45% and 43% vs. 36%).

At the regional level, the initial noteworthy observation is the division of regions into two distinct groups: one where one or more external obstacles/challenges are common among the majority of HEIs, while the other has a wide array of obstacles/challenges, none of which has an overall majority amongst HEIs. Latin America & the Caribbean, North America and Sub-Saharan Africa fall into the first group, while Asia & Pacific, Europe and North Africa & the Middle East into the second one.

Besides funding, which is the primary external obstacle/challenge in all regions, except in North America (although it does come in second, chosen by 58% of HEIs), the regional analysis reveals a variance in importance of the other obstacles across different regions.

As mentioned before, “Language barrier” stands as the second most important obstacle globally with 40% relevance. However, this pattern is only mirrored in Europe (42%) and especially in Latin America & the Caribbean where it concerns just over half of HEIs (51%). In the other regions, it does not rank among the top three obstacles/challenges. This difference in prioritisation can be attributed to the linguistic and educational landscape of each region. While it is not surprising that language barriers are not seen as an obstacle in North America and Sub-Saharan Africa due to the predominance of languages such as English and French in those regions, or in North Africa & the Middle East, where Arabic is common across the region, it is more interesting to see that only 31% of HEIs in Asia & Pacific consider language a barrier, probably because HEIs consider that the knowledge of foreign languages and especially English is quite well developed in that region.

The fact that language barriers are an important obstacle/challenge in Latin America & the Caribbean, is well known, but it is still interesting because this region does share a common language (Spanish). However, when thinking about internationalization HEIs rarely think about intra-regional internationalization but they think more about the lack of knowledge of English as an international language as an obstacle for inter-regional collaboration.

“Visa restrictions imposed by our country on foreign students, researchers and academics” is clearly the most important obstacle in North America, selected by 65% of HEIs. In none of the other regions is this obstacle/challenge selected by more than a quarter of HEIs (26% in Europe). This is not surprising as Canada and the USA are two of the major destinations for student mobility and it is once more a signal of internationalization in North America that is based on talent attraction and HEIs are afraid that restrictive immigration policies could pose a problem to this.

On the contrary, North Africa & the Middle East is the only region in which “Visa restrictions imposed on our students, researchers and academics by other countries” is important, signalling internationalization where outgoing mobility plays an important role.

Finally, it is interesting to note that “Internationalization of higher education is not a policy priority for our government(s)” is relevant for about a third of HEIs in North America and Latin America & the Caribbean. The same percentage of HEIs in Asia & Pacific consider “Lack of local internship and future employment opportunities for international students (e.g. due to lack of capacity and/or willingness by the business sector to hire and retain international talent)” an important obstacle/challenge, a higher percentage than in all other regions (Table16).

**Table 16**

Most important external obstacles of internationalization	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Limited funding to support internationalization efforts/to promote our institution internationally	48%	44%	66%	53%	41%	58%	52%
Language barriers	31%	42%	51%	26%	28%	19%	40%
Difficulties of recognition and equivalences of qualifications, study programs and course credits at regional/national level	37%	24%	25%	30%	30%	19%	26%
Visa restrictions imposed by our country on foreign students, researchers and academics	16%	26%	9%	12%	14%	65%	20%
Negative perceptions of the situation in our country (political, economic, security aspects, etc.)	13%	9%	35%	37%	12%	12%	20%
Internationalization of higher education is not a policy priority for our government(s)	6%	9%	32%	21%	22%	33%	19%
Geopolitical dynamics	13%	25%	9%	23%	16%	30%	18%
Lack of local internship and future employment opportunities for international students (e.g. due to lack of capacity and/or willingness by the business sector to hire and retain international talent)	32%	18%	8%	19%	20%	7%	16%
Visa restrictions imposed on our students, researchers and academics by other countries	11%	9%	10%	21%	38%	7%	13%
Anti-immigration and increasingly nationalist policies	13%	10%	8%	19%	12%	19%	11%
Foreign institutions are not interested in partnering with our institution	13%	8%	9%	12%	19%	2%	10%
Other	2%	7%	3%	2%	1%	2%	4%

To conclude, the varying prominence of external obstacles across different regions reflects the complexities of the higher education landscape and the unique challenges faced by each geographical area. While some patterns emerge, providing partial explanations for these differences, it is essential to approach the analysis with careful consideration, particularly when examining significantly underrepresented regions in this survey, such as Asia & Pacific and North America.

### Comparison with previous Global Survey results

While direct comparisons with previous surveys are, once again, limited due to changes in responses, some global and regional (to a lesser extent) similarities with the 5<sup>th</sup> and 4<sup>th</sup> editions are evident. Notably, “Limited funding for internationalization,” “Language barriers” and to a lesser extent “Difficulties in recognition and equivalences of qualifications” continue to be the primary external obstacles/challenges to internationalization efforts, with limited funding being particularly prominent. It is worth noting that the phrasing of this option was changed in the 4<sup>th</sup> Global Survey to “Limited public funding for internationalization.” These

recurrent themes underscore the ongoing challenges faced by institutions in advancing internationalization initiatives.

At a regional level, it is important to stress that “Visa restrictions imposed by our country on foreign students, researchers and academics” became the most important obstacle/challenge in North America, even more important than “Limited funding for internationalization” which was the most important in previous surveys.

# B

## INTERNATIONALIZATION GOVERNANCE

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## Part B.

# INTERNATIONALIZATION GOVERNANCE

This section investigates internationalization governance, putting emphasis on the strategic approach to internationalization. It also investigates internationalization activities and other aspects of internationalization such as geographic priorities, funding sources, recruitment and promotion policies of both academic and administrative staff and international partnerships. For some of these aspects (e.g. international partnerships) it also investigates the effect of the COVID-19 pandemic. The main results are reported below.

## Main results part B

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### *Policy/strategy for internationalization*

- Over three-quarters of respondents (77%) have elaborated a strategy for internationalization.
- Europe has the highest percentage of HEIs indicating the presence of a policy/strategy (85%), and results for Europe are in line with earlier ones from the EUA Trends reports. Sub-Saharan Africa has the lowest percentage of HEIs indicating the presence of a policy/strategy (61%), with a substantial portion of HEIs in the latter (28%) in the process of preparing it.

### *Status of the policy/strategy*

- 42% of respondents recently revised or issued their policy/strategy for internationalization, with an additional 29% currently undergoing revision, 19% stated that the policy/strategy is scheduled for future revisions, while only 10% reported no recent or anticipated changes.

### *COVID-19 crisis impact on the policy/strategy revision*

- The vast majority (71%) of HEIs indicated that the revision of their internationalization strategy was not due to the COVID-19 crisis.
- There are some interesting regional differences: 46% of HEIs in Asia & Pacific reported that the policy/strategy revision was due to COVID-19 but only 15% did so in North America.

### *Internationalization policy/strategy and activities*

- The policy/strategy for internationalization is institution wide in almost all HEIs that indicated having elaborated such a policy/strategy.
- A significant majority of HEIs (92%) have established dedicated offices or teams to oversee effective implementation of the policy/strategy.
- An international dimension is included in other institutional policies/strategies/plans at 83% of HEIs.

- 79% of the HEIs have defined clear targets and benchmarks to guide their progress within the policy/strategy.
- The policy/strategy/plan is in line with the national internationalization strategy (if one exists) at 77% of HEIs. Considering that the remaining 23% might not have a national internationalization strategy, this results in a very good alignment.
- A monitoring and evaluation framework to assess progress is present at 74% of HEIs.
- Slightly more than half of HEIs (54%) have allocated specific budgetary provisions for the implementation of their policy/strategy.
- The active involvement of students (student organisations and/or student representatives) is present at almost half of HEIs (48%).
- Only 36% of faculties/schools/departments have developed their own internationalization policies/strategies.
- At regional level, results are similar to those at global level, but with some variations, for instance, in Europe where involvement of students (student organisations and/or student representatives) in the design, evaluation, and implementation of the policy/strategy/plan is common (at 63% of HEIs), while in all other regions and particularly in North Africa & the Middle East (37%) and Latin America & the Caribbean (30%) it is not.
- Comparison with previous survey results reveals an increasing trend in the presence of a policy/strategy and dedicated offices or teams to oversee effective implementation of the policy/strategy, a stabilising trend for the presence of a monitoring framework and a decreasing trend for the presence of a dedicated budget.

### *Geographic priorities for internationalization*

- Globally, the majority of HEIs (59%) have geographic priorities for internationalization.
- At regional level there are some differences: in Sub-Saharan Africa, less than half of HEIs have geographic priorities (44%), in Asia & Pacific half of HEIs have them, while in all other regions the majority of HEIs have them with the highest percentage in North America (65%).
- Europe stands out as the most important region for internationalization, with 75% of respondents considering it “very important”.
- A clear regionalization trend emerges in Asia & Pacific, Latin America & the Caribbean and especially Europe where 90% of HEIs consider their own region “very important”. Regionalization is important also in Sub-Saharan Africa where HEIs consider their own region second in importance only to Europe.
- With the exception of intra-regional collaboration, Latin America & the Caribbean, North Africa & the Middle East and Sub-Saharan Africa are always considered the least important by all other regions and particularly by each other. All these regions are considered part of the “Global South” and the results show how inter-regional “South-South” collaboration is definitely not considered a priority.

### *Importance of funding sources for international activities*

- The general institutional budget is the main funding source in all regions, chosen by more than 60% of HEIs in all regions and as much as 74% of HEIs in Latin America & the Caribbean.
- Sub-Saharan Africa is the only region where other two sources (“International organisations (World Bank, European Union, ASEAN, etc.)” and “Foreign governments (bilateral cooperation and aid and development)”) are considered “very important” by the majority of HEIs (56% and 51% respectively).



### *Recruitment and promotion policies*

- At the majority of HEIs, international experience is either considered an asset or not at all both for academic (57%) and administrative staff (68%). It is a requirement only for a tiny minority.
- Almost half of HEIs indicated that knowledge of at least one foreign language is at least partly required for recruitment and promotion of academic staff. This percentage is much lower for administrative staff.
- The regional analysis reveals interesting differences among regions, both for international experience and knowledge of at least one foreign language, and for academic and administrative staff.
- North Africa & the Middle East, followed by Europe and Asia & Pacific are the regions valuing most both international experience and knowledge of at least one foreign language for both academic and administrative staff. On the contrary, North America is the region that values these categories the least, both for academic and administrative staff.

### *Priority of internationalization activities*

- No one stood out as being chosen by a majority of HEIs, showing that there is no overall common priority activity around the world; activities that are prioritised may be determined by differing contexts.
- Among these activities, “Outgoing credit-seeking student mobility (student exchanges)” was identified as the most common internationalization activity, with 44% of HEIs selecting it as one of their priorities. Following closely, “International research collaboration and outputs (e.g., international co-publications)” was considered a priority by 39% of HEIs.
- Comparison with previous global survey results reveals that these two activities have remained the most important over time.
- In some regions there is clearly one activity which is chosen by the majority of respondents as the most important. This is the case in North America, where “Incoming degree-seeking student mobility (recruitment of international students),” is chosen as the most important activity by a striking 74% of HEIs. It is also the case in Latin America & the Caribbean where 65% of HEIs chose “Outgoing credit-seeking student mobility (student exchanges)” as the most important, and in Sub-Saharan Africa where 65% of HEIs choose “International research collaboration and outputs” as the most important.

### *Change in importance of internationalization activities in the last five years*

- “International development and capacity building projects” saw the most substantial increase in importance, noted by 63% of respondents. This is interesting, as respondents to the 6<sup>th</sup> Global Survey identify “Enhanced international cooperation and capacity building” as the top expected benefit of internationalization. “International development and capacity building projects” is not one of the priority activities, but it is the one that has increased the most in importance over the last five years. This means that even if at present there is still a discrepancy between prioritised activities and expected benefits, there is a movement towards convergence.
- There is a degree of subjectivity when it comes to the position of respondents but the differences are not huge and overall “International development and capacity building projects”, “International research collaboration and outputs (e.g. international co-publications)” and “Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.)” are the activities that have increased in importance the most.

- “International development and capacity building projects” is the activity that has increased the most in importance at private HEIs and regionally in North Africa & the Middle East and Asia & Pacific.
- “International research collaboration and outputs (e.g. international co-publications)” is the activity that has increased the most in importance at public HEIs and regionally in Sub-Saharan Africa.
- “Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.)” is the activity that has grown in importance the most in Europe, Latin America & the Caribbean and North America.

### *Changes in international partnerships in the last five years*

- The number of international partnerships in the last five years has increased at the majority of HEIs in all regions of the world, from 62% of HEIs in Latin America & the Caribbean to 79% in Asia & Pacific.

### *The impact of COVID-19 on international partnerships*

- Globally, half the respondents (50%) indicated that changes in international partnerships were not primarily a result of the COVID-19 crisis. On the other hand, 34% believed that the crisis had influenced changes to some extent, 11% perceived a large extent of influence stemming from the crisis, while only 5% asserted that the changes were definitely a consequence of the crisis.
- Private HEIs have been affected more than public HEIs by the COVID-19 crisis when it comes to the change in the number of international partnerships, as 56% of them report that changes in international partnerships were due to COVID-19 while only 46% of public report this.
- Latin America & the Caribbean is the region reporting the greatest impact of COVID-19, with 67% of HEIs reporting that the changes in the number of international partnerships were due to COVID-19, although the majority of them (43%) reported that changes were due to COVID-19 only to some extent. In Sub-Saharan Africa, 56% of respondents indicated that changes in international partnerships were a result of the COVID-19 crisis and it is in this region that the highest percentage of HEIs reported that the changes were definitely a consequence of the crisis (13%).

## **Policy/strategy for internationalization**

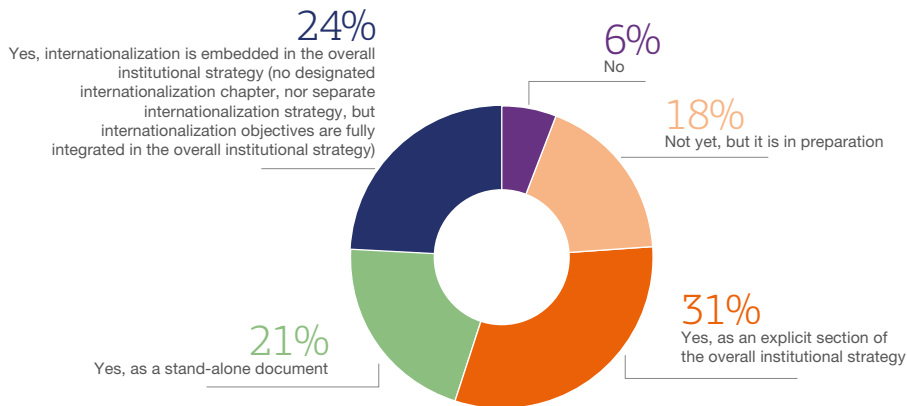
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To examine the strategic approach to internationalization and the extent of institutions’ formalised global engagement efforts it is important to know as a first step if HEIs have a formal policy/strategy/plan for internationalization.

Over three quarters of respondents (77%) have elaborated a policy/strategy for internationalization, with nearly one third (32%) indicating having a specific policy/strategy as an explicit section of their overall institutional strategy, and 21% having a stand-alone document specifically dedicated to internationalization. Almost one-quarter (24%) indicate having integrated internationalization objectives fully into their overall institutional strategy without a designated internationalization chapter or separate strategy; 18% reported being in the process of preparing a policy/strategy for internationalization and only 6% indicated that no policy/strategy exists at their institutions (Figure 30).

**Figure 30**

Presence of a formal institutional policy/strategy for internationalization



### Regional and private vs. public analysis

There are almost no differences between private and public HEIs, the only one to mention is that internationalization policy as a stand-alone document seems to be less common at private HEIs than public ones (17% vs. 23%).

The regional analysis reveals notable differences between the regions.

Europe has the highest percentage of HEIs indicating the presence of a policy/strategy (85%), while Sub-Saharan Africa has the lowest (60%), with a substantial portion of HEIs in the latter (28%) in the process of preparing one.

Although there was no question on the presence of an internationalisation strategy in the latest EUA Trends survey, the results for Europe are in line with those of earlier Trends reports: 91% of European HEIs had a dedicated strategy in Trends 2015.

The percentage of HEIs indicating a complete absence of a policy/strategy is low in all regions but higher in Sub-Saharan Africa and North Africa & the Middle East, with 12% and 13%, respectively, double or three times more than in other regions.

An explicit section of the overall institutional strategy is the most common form of a policy/strategy in all regions except North America and Asia & Pacific.

In North America, the stand-alone document is the most common option (40% of HEIs). Conversely, in North Africa & the Middle East this formalisation of an internationalization policy/strategy as a stand-alone document is uncommon (7% of HEIs).

Asia & Pacific stands out as the only region where the percentage of HEIs indicating internationalization embedded in the overall institutional strategy (35%) is the highest among all options. Also, in Latin America & the Caribbean and North Africa & the Middle East this option is more common than a standalone document; in Sub-Saharan Africa the two options have an equal percentage of HEIs, whereas in Europe and North America the stand-alone document is more common (Table 17).

**Table 17**

Does your institution have a formal policy/strategy for internationalization?	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Presence of a strategy	76%	85%	72%	60%	67%	74%	76%
Yes, as an explicit section of the overall institutional strategy	29%	33%	31%	33%	39%	19%	32%
Yes, internationalization is embedded in the overall institutional strategy (no designated internationalization chapter, nor separate internationalization strategy, but internationalization objectives are fully integrated in the overall institutional strategy)	35%	25%	25%	14%	20%	16%	24%
Yes, as a stand-alone document	11%	27%	17%	14%	7%	40%	21%
Not yet, but it is in preparation	18%	11%	23%	28%	20%	19%	18%
No	6%	4%	5%	12%	13%	7%	6%

These results show that a strategy for internationalization (either as a stand-alone document, forming part of the overall institutional strategy, or embedded in it) has been elaborated at the majority of HEIs in all regions, but that there are still some substantial differences between regions.

### Comparison with the previous Global Survey results

When comparing these results with those of previous editions, it is important to note that direct comparisons with the 5<sup>th</sup> and 4<sup>th</sup> editions are not possible due to slight modifications in the question and answer options.

In the 4<sup>th</sup> Global Survey, the question asked was almost the same: “Has a policy or strategy for internationalization been elaborated at your institution?” but the possible answers were “Yes”, “No, internationalization forms an explicit part of the overall institutional strategy”, “Being prepared”, “No”, “Don’t know”. The 5<sup>th</sup> Global Survey introduced further changes in the answer options with “Yes, as a stand-alone document”, “Yes, internationalization forms an explicit part of the overall institutional strategy”. The 6<sup>th</sup> Global Survey further expands the answer options adding “Yes, internationalization is embedded in the overall institutional strategy (no designated internationalization chapter, nor separate internationalization strategy, but internationalization objectives are fully integrated in the overall institutional strategy)” but excluding “Don’t know” as an option.

Overall, the presence of a policy/strategy/plan for internationalization has remained relatively stable at global level across the three survey editions.

However, at regional level there are some changes, Europe continues to have the highest percentage of HEIs with a policy/strategy/plan in place, it even increased from 80% to 85%. Latin America & the Caribbean has seen a significant increase in this aspect, moving away from being the last region in terms of presence of a policy/strategy (moving from 64% to 72%). An increase of 8 percentage points can also be seen in North America (from 66% to 74%). Asia & Pacific experienced a small increase (from 74% to 76%).

However, there seems to be an increase in the percentage of HEIs without a strategy/policy/plan in place in Sub-Saharan Africa and North Africa & the Middle East, even if the regional division in the 6<sup>th</sup> Global Survey is different. This is difficult to explain and it might be due to the low statistical relevance of these regions in both editions of the survey.

This result indicates that the transition towards a strategic approach to internationalization has been underway for quite some time at the majority of HEIs worldwide. A trend that was further supported in the 5<sup>th</sup> Global Survey, where HEIs were asked about the initial development of their internationalization policy/strategy/plan.

In the 6<sup>th</sup> Global Survey, a new and different follow-up question explores the current status of the policy/strategy being elaborated, revealing variations in their progress towards a more strategic approach across different institutions.

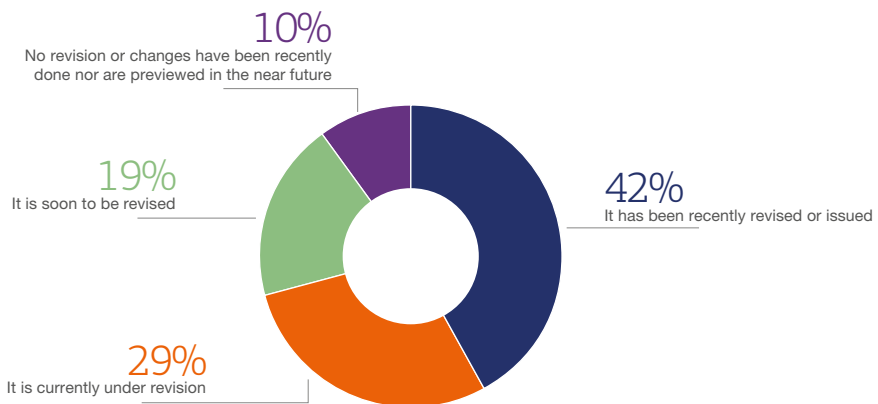
### Status of the policy/strategy

HEIs that stated that they have a policy/strategy were asked about the current status of such a policy/strategy.

Forty-two percent of respondents recently revised or issued their policy/strategy for internationalization, with an additional 29% currently undergoing revision; 19% stated that the policy/strategy is scheduled for future revisions, while only 10% reported no recent or anticipated changes (Figure 31).

**Figure 31**

Current status of a formal policy/strategy or plan for internationalization



This is an encouraging result showing that internationalization policies/strategies are living documents and that they are frequently revised.

### Regional and private vs. public analysis

There are almost no differences between private and public HEIs.

On the contrary, the analysis at the regional level presents more intriguing variations. Europe stands out as the region with the highest percentage (51%) of respondents who have recently

revised or issued their policy/strategy. In contrast, Asia & Pacific, Sub-Saharan Africa and North Africa & the Middle East show the lowest percentages, at 31%, 31% and 26%, respectively.

However, Sub-Saharan Africa and North Africa & the Middle East have the highest percentage (42% and 37%, respectively) of HEIs currently in the process of revising their policy/strategy.

Finally, North Africa & the Middle East have the highest percentage (20%) of HEIs that have not revised, made any changes, nor have plans for revisions in the near future, followed by North America with 19% (Table 18).

**Table 18**

What is the current status of the formal policy, strategy or plan for internationalization?	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
It has been recently revised or issued	31%	51%	40%	31%	26%	38%	42%
It is currently under revision	31%	22%	34%	42%	37%	25%	29%
It is soon to be revised	23%	18%	18%	23%	17%	19%	19%
No revision or changes have been recently done nor are previewed in the near future	15%	9%	8%	4%	20%	19%	10%

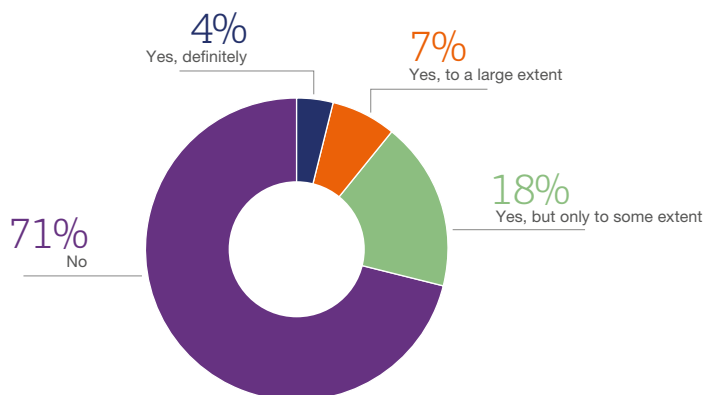
### COVID-19 crisis impact on the policy/strategy revision

The COVID-19 crisis had a major impact on HEIs and from previous research conducted by the IAU it seemed that internationalization strategies were also affected. More specifically 31% of HEIs responding to the Second IAU Global Survey on the impact of COVID-19 (Jensen *et al.*, 2022) stated that they revised their strategies and another 43% were discussing revision. However, already from the qualitative follow-up study that was done one year later (Guidi *et al.*, 2023) there were indications that HEIs that were thinking about changing their strategies did not do so in the end.

The results of the present survey confirm this trend, as Figure 32 shows, the vast majority (71%) of HEIs indicated that the revision of their internationalization strategy was not due to the COVID-19 crisis.

**Figure 32**

Is the revision of the policy/strategy mainly due to the COVID-19 crisis?



Meanwhile, 18% reported some influence, 7% stated that the revision was due to the COVID-19 crisis to a large extent, and only 4% stated that the crisis was the main reason for revision.

### Regional and private vs. public analysis

The COVID-19 crisis seems to have had a bigger impact on private HEIs than on public ones. However, the majority of HEIs, be they private (66%) or public (74%) report no causality between the COVID-19 crisis and the revision of their strategies.

As only HEIs that replied they had a policy/strategy and they had revised it replied to this question, the number of responses per region is low, thus a reliable regional analysis for the impact of the COVID-19 crisis on policy/strategy revision is not possible. However, data suggests that the crisis had a more substantial impact on policy/strategy revision in Sub-Saharan Africa, North Africa & the Middle East, and particularly in Asia & Pacific where 46% of HEIs reported that the COVID-19 crisis was responsible, at least to some extent, for the revision of the policy/strategy. Caution is required when interpreting these findings, but they offer interesting insights into potential regional variations in response to the global pandemic's challenges (Table 19).

Table 19

Is this revision mainly due to the COVID-19 crisis?	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
No	54%	79%	64%	72%	62%	85%	71%
Yes, but only to some extent	24%	14%	25%	12%	22%	4%	18%
Yes, to a large extent	10%	4%	8%	8%	14%	12%	7%
Yes, definitely	12%	3%	3%	8%	3%	0%	4%

## Internationalization policy/strategy and activities

In order for strategic planning to be successful, having a policy/strategy for internationalization is not enough, and implementation activities and support structures are also required.

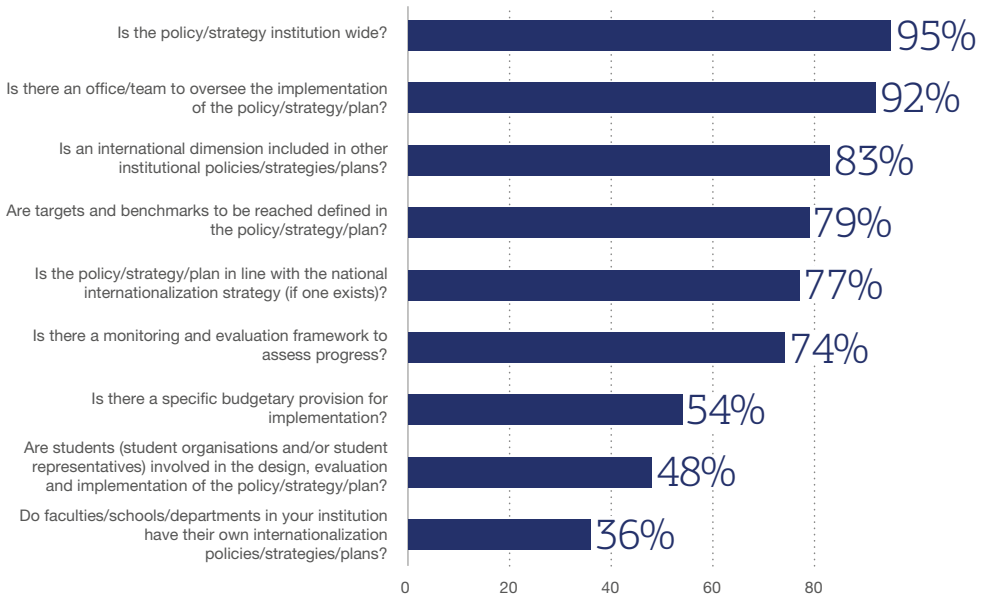
HEIs that replied that they do have a policy/strategy (whatever format it might take) were asked to clarify whether or not:

1. The policy/strategy is institution-wide
2. There is an office/team to oversee the implementation of the policy/strategy/plan
3. An international dimension is included in other institutional policies/strategies/plans
4. Targets and benchmarks to be reached are defined in the policy/strategy/plan
5. The policy/strategy/plan is in line with the national internationalization strategy (if one exists)
6. There is a monitoring and evaluation framework to assess progress
7. There is a specific budgetary provision for implementation
8. Students (student organisations and/or student representatives) are involved in the design, evaluation and implementation of the policy/strategy/plan
9. Faculties/schools/departments in the institutions have their own internationalization policies/strategies/plans

The percentages of HEIs replying affirmatively are shown in [Figure 33](#).

**Figure 33**

Internationalization policy/strategy and activities



The policy/strategy for internationalization is institution-wide in almost all HEIs that indicated having elaborated such a policy/strategy; furthermore, a significant majority of HEIs (92%) have established dedicated offices or teams to oversee effective implementation of the policy/strategy.

In pursuit of a holistic approach to internationalization, 83% of HEIs have thoughtfully integrated an international dimension into other institutional policies/strategies, showcasing their commitment beyond the primary policy.

As part of their strategic planning, around 79% of the HEIs have defined clear targets and benchmarks to guide their progress within the policy/strategy. This provides a structured framework for monitoring and evaluating the effectiveness of their internationalization efforts.

Alignment with broader national goals is slightly lower with 77% of the HEIs, whose policy/strategy corresponds to the national internationalization strategy. As respondents were forced to reply only yes or no to this question, HEIs in countries without a national strategy might have replied “no”, thus alignment between institutional and national strategies might be even more common.

To ensure accountability and continuous improvement, a substantial 74% of the HEIs have adopted a monitoring and evaluation framework to regularly assess their progress and make informed adjustments.

While over half of HEIs (54%) have allocated specific budgetary provisions for the implementation of their policy/strategy, there remains some concern, as 46% of institutions still lack this financial provision. The absence of a budgetary allocation reflects the perceived challenge of insufficient financial resources hindering internationalization efforts. However, merely having a



budget does not guarantee sufficient funding proportional to the envisaged activities, thereby necessitating careful consideration to achieve the set goals.

Active involvement of students (student organisations and/or student representatives) is present only at 48% of the HEIs, showing that the importance of student participation in shaping and enriching internationalization endeavours is still not common at all HEIs around the world.

Finally, only 36% of faculties/schools/departments have developed their own internationalization policies/strategies, this shows that a centralised approach to strategic internationalization is still dominant.

## Regional and private vs. public analysis

A smaller percentage of private HEIs report alignment between their institutional internationalization policies/strategies and the national internationalization policy (if one exists) (69% vs. 82%), student involvement is also less common at private HEIs (43% vs. 51%). On the contrary, the presence of a specific budget for internationalization (61% vs. 50%) is more common at private HEIs than at public ones.

The results of the regional analysis as can be seen in [Figure 34](#) show that:

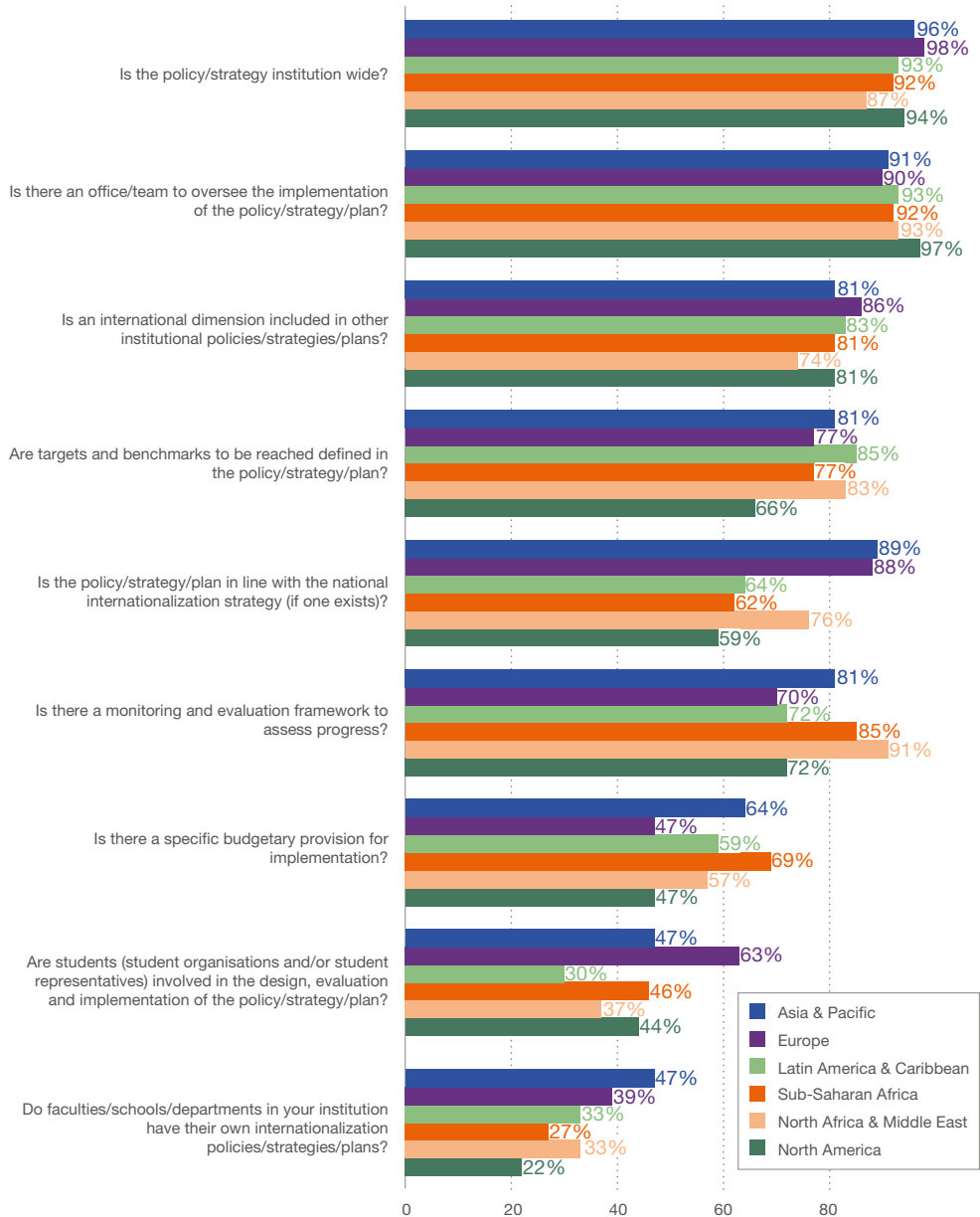
1. The policy/strategy is institution-wide at almost all HEIs in all regions, with the lowest percentage of HEIs having an institution-wide policy/strategy being 87% in North Africa & the Middle East
2. There is an office or a team in charge of overseeing implementation of the policy/strategy in almost all HEIs in all regions with small variations between regions (from 97% of HEIs in North America to 90% in Europe)
3. An international dimension is incorporated into other institutional policies/strategies/plans at the vast majority of HEIs in all regions, only North Africa & the Middle East shows a slightly lower percentage (74% while all other regions are above 80%).
4. Targets and benchmarks are also defined at the vast majority of HEIs in all regions, but this time North America is the region with the lowest percentage (66%), while Latin America & the Caribbean exhibits the highest (85%).
5. In terms of alignment with national internationalization strategy, the results show a high degree of variation among regions. Asia & Pacific and Europe reported the highest percentages, with 89% and 88% of HEIs, respectively. North Africa & the Middle East follows at 76% while the other three regions have lower percentages: Latin America & the Caribbean 64%, Sub-Saharan Africa 62%, and North America having the lowest percentage at 59%. The fact that North America is the region with the lowest percentage is not surprising as this region is composed of only two countries and the USA does not have a national strategy for internationalization. Indeed, the percentage is even too high as Canadian HEIs represent only 35% of North American respondents, so there are some US HEIs that replied positively to this question even if the USA does not have a national internationalization strategy.
6. A monitoring and evaluation framework is also present at the vast majority of HEIs with some regional variations, going from the highest percentages in North Africa & the Middle East, Sub-Saharan Africa and Asia & Pacific (91%, 85% and 81% respectively) to the lowest in the Americas and Europe (72% in Latin American & the Caribbean and in North America, and 70% in Europe).
7. The presence of a specific budget for internationalization is less common and shows a high degree of variation across regions, with Sub-Saharan Africa reporting the highest percentage at 69%, closely followed by Asia & Pacific at 64%. A specific budget is also

present at the majority of HEIs in Latin America & the Caribbean (59%) and North Africa & the Middle East (57%) but in Europe and North America it is present at only slightly less than half of HEIs (47%).

8. The involvement of students (student organisations and/or student representatives) in the design, evaluation, and implementation of the policy/strategy/plan is common only in Europe (63%) and particularly low in North Africa & the Middle East (37%) and especially Latin America & the Caribbean, where is present at only 30% of HEIs.

**Figure 34**

Internationalization policy/strategy and activities by region



9. In no region, policies/strategies at the faculty/school/department level are present at the majority of HEIs. The biggest percentage is found in Asia & Pacific (47%) while North America has the lowest percentage, with only 22% of HEIs having policies/strategies/plans at the faculty/school/department.

The regional analysis presents a mixed picture of internationalization efforts among HEIs. While positive responses are evident in five of the questions across most regions (with percentages around 70% or more), there are disparities in the presence of a dedicated budget for internationalization. Student involvement in the internationalization process is low across all regions except in Europe, while internationalization policies/strategies/plans at the faculty/school/department level remains common only at a minority of HEIs in all regions and quite rare in some of them.

Despite these challenges, it is worth noting the positive trend in alignment with national internationalization strategies in all regions, a sign that HEIs and governments are walking in the same direction when it comes to their strategic approach to internationalization.

Overall, the majority of HEIs in all regions have embraced a strategic approach to internationalization, having an institutional wide policy/strategy in place, having an office to implement it, having defined targets and benchmarks in the strategy and having a monitoring and evaluation framework in place. It is also positive to underline that an international dimension is included in other institutional policies. However, there is a clear need for improvement when it comes to providing the adequate financial resources and to involve students. There is also a risk that the strategic approach remains confined at the central institutional level and does not reach faculties/schools/departments.

## Comparison with previous Global Survey results

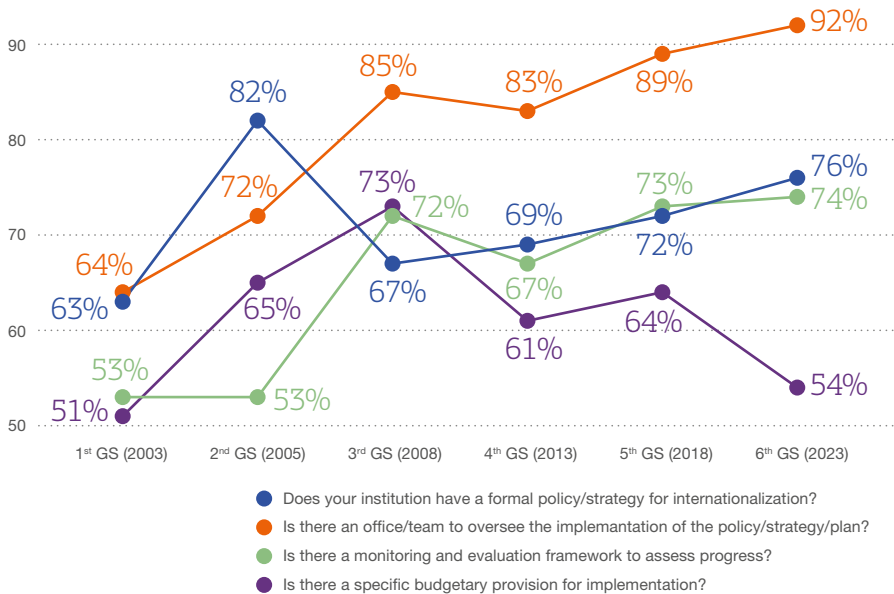
The questions on the presence of a policy/strategy, an office/team, a monitoring framework and a dedicated budget were present in all previous editions of the Global Surveys and therefore allow for a comparison over time (Figure 35).

1. The results of the 6<sup>th</sup> Global Survey show an increase in the presence of a policy/strategy for internationalization over the past 20 years. Excluding the results of the 2<sup>nd</sup> Global Survey, which appear as an outlier in the series, a consistent upward trend is evident, with the percentage of HEIs having a policy/strategy further increasing to 76% in the 6<sup>th</sup> Global Survey (2023). It is also interesting to report that when they exist, internationalization policies/strategies are now institution-wide at almost all HEIs worldwide (95%).
2. The results of the 6<sup>th</sup> Global Survey reveal a further slight increase in the percentage of HEIs with a dedicated office or team to implement the policy/strategy, reaching now 92%. This represents a 28-percentage point rise over the past 20 years, suggesting that the presence of a dedicated office/team is now becoming established as the norm at HEIs.
3. The percentage of HEIs reporting the presence of a monitoring framework in the 6<sup>th</sup> Global Survey slightly increased to 74%, a similar figure to the 3<sup>rd</sup> and 5<sup>th</sup> editions, despite a drop in the 4<sup>th</sup> Global Survey, which remains unexplained. Notably, the growth in the presence of a monitoring framework appears to have occurred between 2005 and 2009, and since then, it has stabilised. Nevertheless, nearly one-quarter of HEIs still do not have a monitoring framework in place.
4. The presence of a dedicated budget for internationalization has shown fluctuations

over the past two decades. Initially, in the 1<sup>st</sup> Global Survey (2003), 50% of HEIs reported having a dedicated budget, which increased to 73% in the 3<sup>rd</sup> Global Survey (2009). However, this percentage decreased to 61% in the 4<sup>th</sup> Global Survey (2014) and slightly rose again to 64% in the 5<sup>th</sup> Global Survey (2018). In the current 6<sup>th</sup> Global Survey, the percentage of HEIs with a dedicated budget dropped once more to 54%, almost coming back to where it was 20 years ago. The decrease between 2009 and 2014 can be attributed to the global financial crisis, while the decline between 2018 and 2023 might be linked to the impact of the global COVID-19 pandemic and subsequent funding cuts experienced by HEIs, but this is probably not enough to explain such a reduction. The absence of a dedicated budget is problematic as no strategic approach to internationalization can be successful without the necessary financial resources. However, a more optimistic interpretation is also possible: as internationalization has become more embedded in all institutional activities, it does not need a dedicated budget anymore, because it is financed through other lines in the general institutional budget.

**Figure 35**

Evolution in time presence of policy/strategies and supporting structures



The questions on the presence of explicit targets and benchmarks and of an international dimension included in other institutional policies were present in the 5<sup>th</sup> edition but not in the previous ones, so a comparison is possible only with the 5<sup>th</sup> edition.

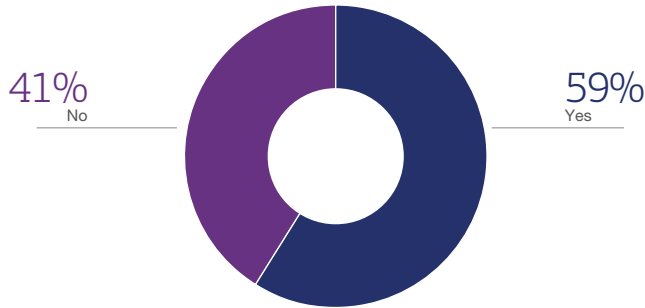
Both the presence of explicit targets and benchmarks and of an international dimension included in other institutional policies increased in the 6<sup>th</sup> Global Survey, respectively from 72% to 79% and from 77% to 83%.

## Geographic priorities for internationalization

HEIs were asked if they have specific geographic priorities for internationalization. The majority of them (59%) replied positively (Figure 36).

**Figure 36**

Does your institution have specific geographic priorities for internationalization?



The lowest percentage of HEIs having geographic priorities are in Sub-Saharan Africa, where less than half of HEIs have them (44%), in Asia & Pacific half of HEIs have them, while in all other regions the majority of HEIs have them, with the highest percentage being in North America (65%) (Table 20).

**Table 20**

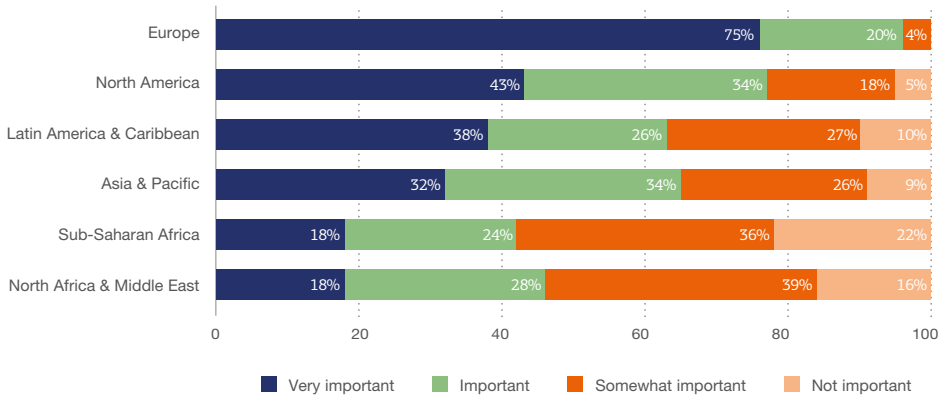
Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
50%	62%	61%	44%	54%	65%

HEIs that replied positively were asked to indicate the level of importance of each region (“very important, important”, “somewhat important”, or “not important”).

Figure 37 clearly demonstrates that Europe stands out as the most important region for internationalization, with 75% of respondents considering this “very important”. On the contrary, Sub-Saharan Africa and North Africa & the Middle East rank as the lowest, with only 18% considering them “very important” and less than half of HEIs considering them either “very important” or “important”. Sub-Saharan Africa is also the region considered as “not important” by the highest percentage of HEIs (22%). The other regions, namely North America, Latin America & the Caribbean, and Asia & Pacific are considered “very important” or “important” by the majority of HEIs, with North America being considered “very important” by a little bit less than half of HEIs (43%).

**Figure 37**

Level of priority of each region



### Regional and private vs. public analysis

A slightly higher percentage of private HEIs have geographic priorities for internationalization (61% vs. 57% for public HEIs).

In terms of priority of regions, both private and public HEIs follow the same order with Sub-Saharan Africa and North Africa & the Middle East at a very similar level of importance, at the bottom of the list. However, public HEIs seem to place a higher degree of importance to these two regions than private ones. The other notable result is that public HEIs clearly identify Europe as the most important region (78% very important), far more important than all other regions (the second region North America has 37% of HEIs considering it “very important”). While private HEIs still consider Europe as the most important, the gap with the other regions is less (i.e. Europe is “very important” for 71% of HEIs and North America for 51% of HEIs).

A clear regionalization trend emerges in Asia & Pacific, Latin America & the Caribbean and especially Europe where 90% of HEIs consider their own region “very important”. Regionalization is important also in Sub-Saharan Africa where HEIs consider their own region second in importance only to Europe. It is less important in North Africa & the Middle East (third after Europe and North America) and not at all important in North America, where only 50% of HEIs consider their region “very important” or “important” and they put it at the bottom of the list.

Europe is the most important region for HEIs in Sub-Saharan Africa and North Africa & the Middle East, the second in Asia & Pacific and Latin America & the Caribbean and the fourth in North America. In all regions it is considered either “important” or “very important” by 70% of HEIs or more.

Asia & Pacific is the most important region for HEIs in North America and it is considered either “important” or “very important” by the majority of HEIs in all regions. The same is true for North America.

North Africa & the Middle East is considered either “important” or “very important” by the majority of HEIs in all regions except Latin America & the Caribbean.

Sub-Saharan Africa is considered “important” or “very important” by the majority of HEIs only in their own region, in North America and in North Africa & the Middle East.

Finally, Latin America & the Caribbean is considered “important” or “very important” by the majority of HEIs only in their own region and in North America, where it is the second most important region after Europe.

With the exception of intra-regional collaboration and for North America, it is Latin America & the Caribbean, North Africa & the Middle East and Sub-Saharan Africa that are always the regions considered of least importance by all other regions and particularly by each other. All these regions are considered part of the “Global South” and the results show how inter-regional “South-South” collaboration is definitely not considered a priority.

The regionalisation trend is not surprising in Europe, less so in Asia & Pacific, but it is more interesting to see in Latin America & the Caribbean and also to a lesser extent in Sub-Saharan Africa. Contrary to the previous results, this shows that intra-regional “South-South” cooperation is a priority, at least in these two regions.

However, the attractiveness of Europe for all other regions is undeniable.

Finally, the results for North America are once again confirmation of the importance of student recruitment in this region, as Asia & Pacific is the main source of mobile students in the world (Table 21).

**Table 21**

Rows: geographical level of importance for internationalization (only “very important” %) Columns: regions of respondents	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Asia & Pacific	71%	28%	17%	37%	33%	71%
Europe	55%	90%	69%	63%	79%	39%
Latin America & the Caribbean	19%	17%	75%	16%	18%	43%
Sub-Saharan Africa	19%	17%	4%	58%	33%	43%
North Africa & the Middle East	23%	18%	6%	26%	44%	29%
North America	48%	34%	56%	37%	49%	21%

### Comparison with the 4<sup>th</sup> and 5<sup>th</sup> Global Survey results

The percentage of HEIs having geographic priorities for internationalization is higher in the 6<sup>th</sup> Global Survey than in the 5<sup>th</sup> edition (52%) at the global level, but slightly lower than in the 4<sup>th</sup> edition (60%).

As Table 22 depicts, the increase in the percentage of HEIs with geographical priorities for internationalization in the 6<sup>th</sup> Global Survey is evident in almost all regions. However, it is important to note that in Sub-Saharan Africa and North Africa & the Middle East, direct comparisons with previous editions are not possible due to the aforementioned differences in regional distribution. Nevertheless, the significant rise in geographical priorities for internationalization suggests that the drop observed between the 4<sup>th</sup> and 5<sup>th</sup> editions may have been influenced by the different samples of institutions in the two surveys.

This emphasises the importance of careful consideration and further research to verify the trends observed in the survey data. Nonetheless, this rise in geographical priorities for internationalization highlights the growing importance of global engagement and strategic partnerships among HEIs worldwide.

**Table 22**

Asia & Pacific			Europe			Latin America & the Caribbean			Sub-Saharan Africa	North Africa & the Middle East	North America		
4 <sup>th</sup>	5 <sup>th</sup>	6 <sup>th</sup>	4 <sup>th</sup>	5 <sup>th</sup>	6 <sup>th</sup>	4 <sup>th</sup>	5 <sup>th</sup>	6 <sup>th</sup>	6 <sup>th</sup>	6 <sup>th</sup>	4 <sup>th</sup>	5 <sup>th</sup>	6 <sup>th</sup>
61%	43%	50%	66%	56%	62%	54%	51%	61%	44%	54%	56%	58%	65%

In previous editions (4<sup>th</sup> and 5<sup>th</sup>) the regions were different (Africa and Middle East). The percentages for these regions were respectively, in the 4<sup>th</sup> Survey, Africa 44%, Middle East 60%, and in the 5<sup>th</sup> Survey, Africa 48%, Middle East 53%.

The regional results from the 6<sup>th</sup> Global Survey cannot be directly compared with previous editions due to two reasons: the change from ranking geographical priorities to rating their level of importance, and the aforementioned variations in regional distribution. However, certain trends persist across all editions, with Europe remaining the most important geographical area for most regions, even if its importance for North American HEIs seems to have declined.

Asia & Pacific also continues to be the geographical priority for North America, but seems to have decreased slightly in importance for European HEIs in the 6<sup>th</sup> edition in favour of North America.

North America remains relatively important for all regions in the world.

On the contrary, Latin America & the Caribbean, North Africa & the Middle East and Sub-Saharan Africa consistently rank as the regions with the lowest priority across all survey editions.

Another interesting trend is the remaining high level of importance of intra-regional cooperation for Asia & Pacific, Europe and Latin America & the Caribbean. However, in Sub-Saharan Africa and North Africa & the Middle East, the importance of intra-regional collaboration seems to be decreasing as in the 5<sup>th</sup> Global Survey Africa was the most important region for African HEIs & the Middle East was the second for Middle Eastern HEIs while now Sub-Saharan Africa is second for Sub-Saharan African HEIs and North Africa & the Middle East is third for HEIs in that region.

This emphasises that the ongoing process of regionalization is in continuous evolution and highlights the significance of further understanding of regional dynamics in shaping internationalization efforts at HEIs.

## Importance of funding sources for international activities

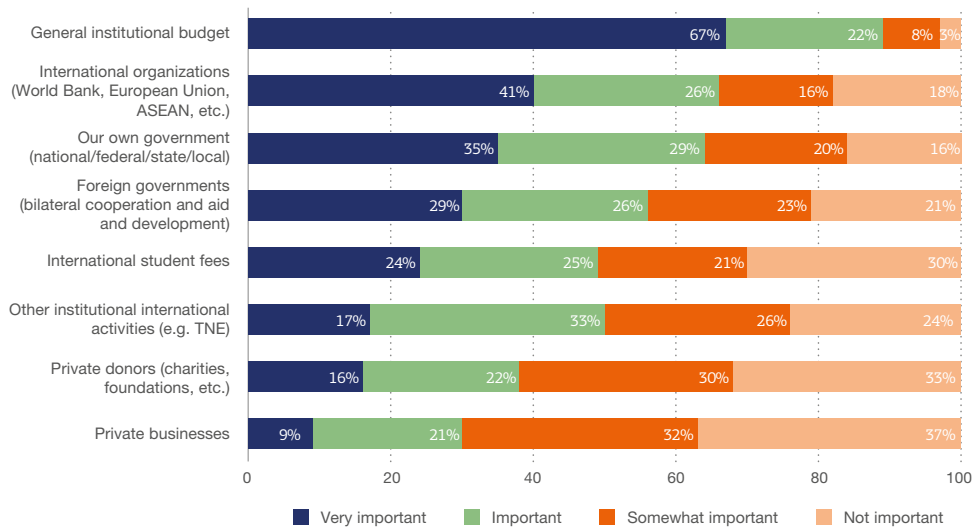
For the majority of HEIs, the most important funding source for international activities is clearly the “General institutional budget”, with 67% of respondents reporting this as “very important”, while 22% report this as “important”, 8% as “somewhat important” and only 3% as “not important”. The following most important funding sources are “International organisations



(World Bank, European Union, ASEAN, etc.), “Our own government (national/federal/state/local)” and “Foreign governments (bilateral cooperation and aid and development)” have all been considered “important” or “very important” by more than half of the respondents. “Private businesses” appears to be the least relevant funding source, with 37% of respondents considering it “not important,” 32% as “somewhat important,” 21% as “important,” and only 9% as “very important” (Figure 38).

**Figure 38**

Most important funding sources for internationalization



### Regional and private vs. public analysis

The general institutional budget is clearly the main funding source for both private and public HEIs, the only one selected by a majority of HEIs in both cases.

Funding from International organisations (World Bank, European Union, ASEAN, etc.) is also the second most important for both private and public HEIs, however, while for public HEIs funding from own government (national/federal/state/local) is of comparable importance, for private HEIs this is much less relevant.

The general institutional budget is the main funding source in all regions, chosen by more than 60% of HEIs in all regions and even by 74% of HEIs in Latin America & the Caribbean.

Sub-Saharan Africa is the only region where two other sources are considered “very important” by the majority of HEIs (“International organisations (World Bank, European Union, ASEAN, etc.)” (56%) and “Foreign governments (bilateral cooperation and aid and development)” (51%).

“International organisations (World Bank, European Union, ASEAN, etc.)” are the second most important source of funding in all other regions except in Asia & Pacific (where is a very close third) and North America where none of the respondents identified this as “very important.” and almost half of them (47%) identified it as “not important”. In these two regions the second most important funding source is “International student fees”.

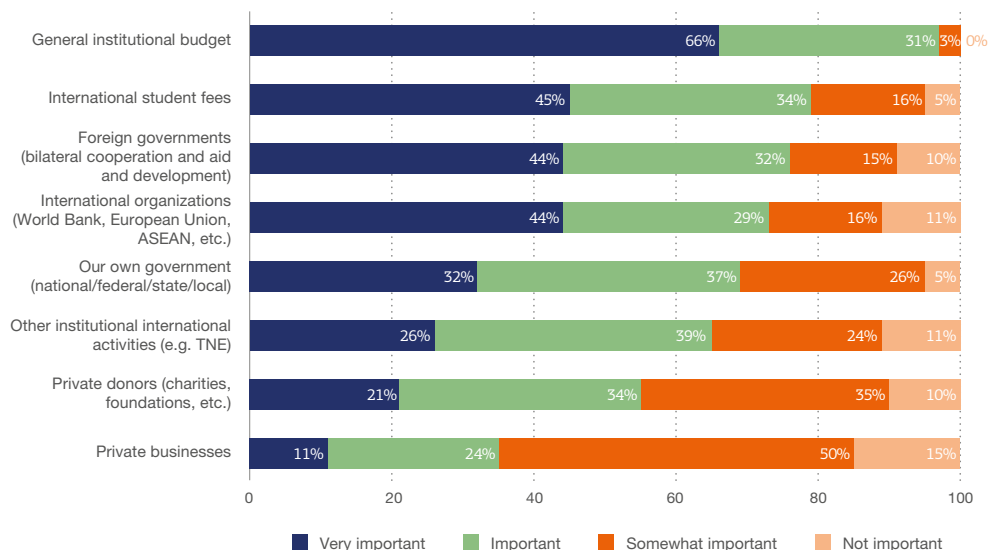
Funding from the government (national/federal/state/local) ranks as the third most important source of funding in Europe, North America and North Africa & the Middle East, while in Asia & Pacific, Latin America & the Caribbean and Sub-Saharan Africa it is “Foreign governments (bilateral cooperation and aid and development)”.

Funding sources from other institutional activities (e.g., TNE), private businesses and private donors (charities, foundations, etc.) are much less important in all regions.

An interesting consideration is the different level of importance attributed to all funding sources in different regions of the world. While in Sub-Saharan Africa all funding sources are considered “important” or “very important” by the majority of HEIs, in North America only two of them (“General institutional budget” and “International student fees”) are (Figure 39-44).

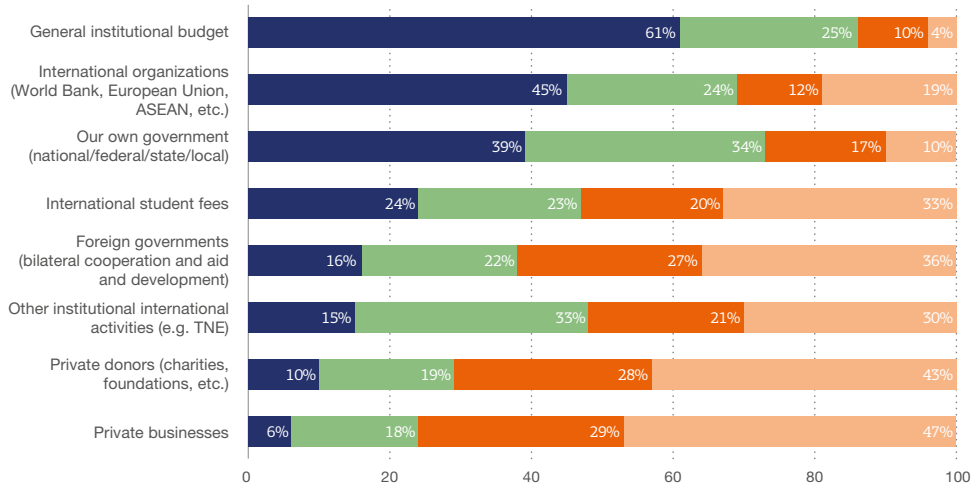
**Figure 39**

Most important funding sources in Asia & Pacific

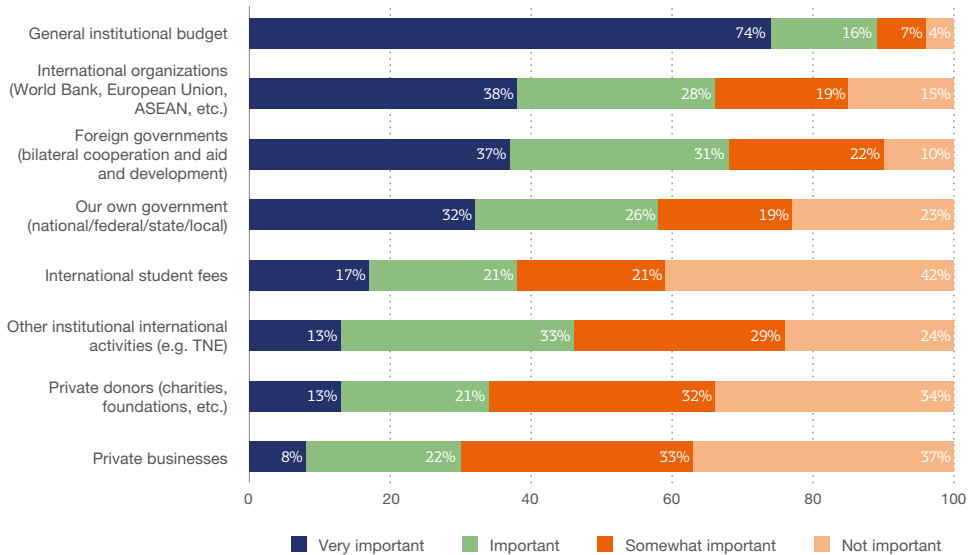


**Figure 40**

Most important funding sources in Europe

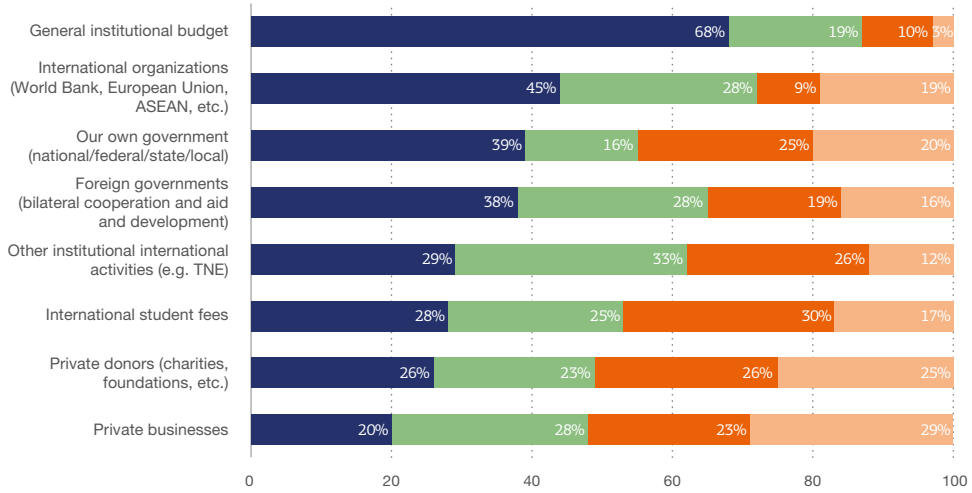
**Figure 41**

Most important funding sources in Latin America &amp; Caribbean



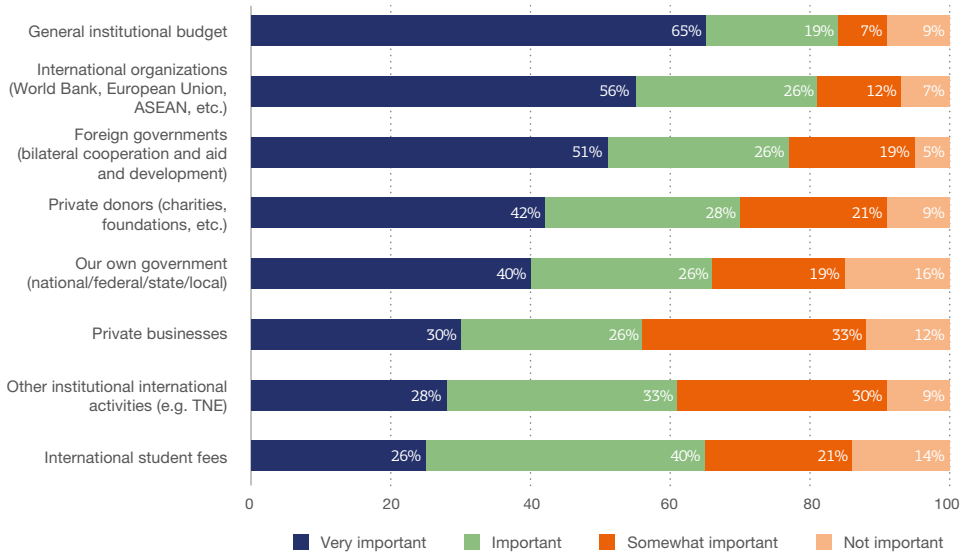
**Figure 42**

Most important funding sources in North Africa & Middle East



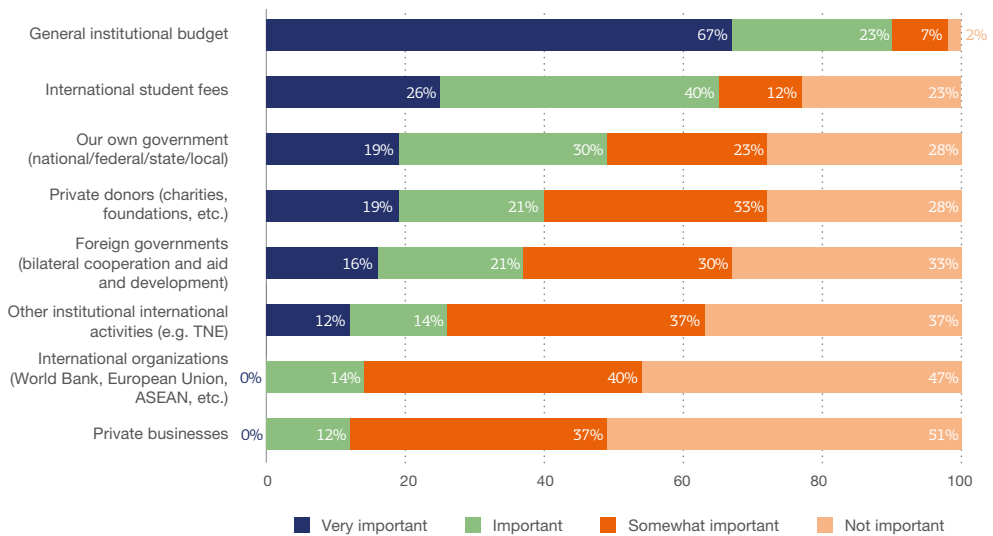
**Figure 43**

Most important funding sources in Sub-Saharan Africa



**Figure 44**

Most important funding sources in North America



### Comparison with previous Global Survey results

Comparing the results of this survey with those of the 4<sup>th</sup> and 5<sup>th</sup> editions should be approached with caution due to slight modifications in the list of funding sources and assessment approach.

In the previous editions, the list of funding sources included items such as the general institutional budget, funds generated from international student fees, funds from other institutional international activities (e.g. TNE), external public funds (including grants and/or programs from international organisations), external private funds (including grants from foundations, corporations, and other sources), and options like “not funded” and “don’t know.” However, in the 6<sup>th</sup> Global Survey, the list was updated to encompass foreign governments (bilateral cooperation and aid and development), international organisations (World Bank, European Union, ASEAN, etc.), our own government (national/federal/state/local), private businesses, and private donors (charities, foundations, etc.).

In the 6<sup>th</sup> Global Survey, respondents were asked to rate the significance of each funding source as “very important,” “important,” “somewhat important,” or “not important,” rather than ranking their top three sources.

Despite these changes, the findings on the most important funding sources at global level, namely the general institutional budget and external public funds (be they from national or foreign governments or from international organisations) appear to have remained consistent since the 4<sup>th</sup> Global Survey.

## Recruitment and promotion policies

Amid the growing significance of global engagement and internationalization in higher education, academic and administrative staff at HEIs need global, international and intercultural skills and competences. It is interesting to know how these skills and competences are measured and if

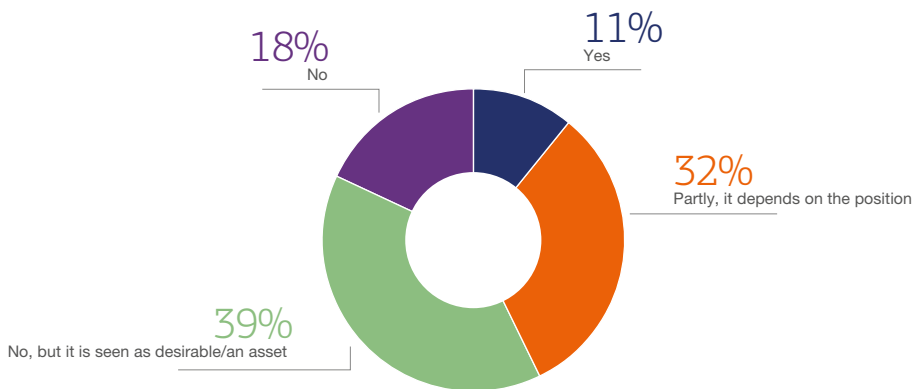
they are taken into consideration for recruitment and promotion policies at HEIs. Therefore, this section examines how HEIs incorporate international experience and foreign language skills into their recruitment and promotion policies for both academic and administrative staff.

### Consideration of international experience

As Figure 45 illustrates, only 11% of respondents indicated that prior international experience is a requirement for academic staff recruitment and promotion at their institutions. Almost one-third consider it partly so, depending on position, while 39% view it as desirable or an asset but not a requirement and only 18% reported international experience not being taken into consideration at all.

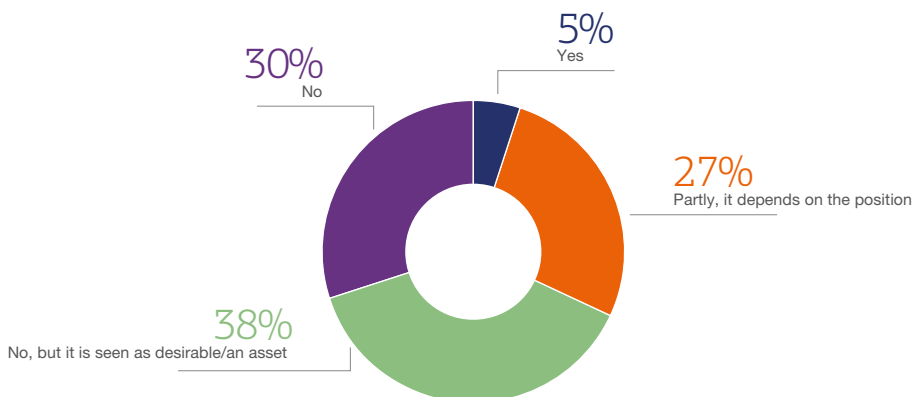
**Figure 45**

Do the recruitment and/or promotion policies for academic staff at your institution include prior international experience as a requirement?



**Figure 46**

Do the recruitment and/or promotion policies for administrative staff at your institution include prior international experience as a requirement?



Regarding administrative staff, the emphasis on international experience is lower. Only 5% of respondents stated that it is a requirement for recruitment and promotion. For 27%, it is partly considered but depends on the position. Similarly to academic staff, 38% reported that

international experience is not a requirement but is seen as desirable or an asset. However, a much higher percentage than for academic staff, 30%, indicated that international experience is not taken into consideration for administrative staff recruitment and promotion (Figure 46).

### Regional and private vs. public analysis

Results for academic staff from private and public HEIs are similar, the only difference being a slightly higher percentage of private HEIs considering prior international experience a requirement in private HEIs (14% vs. 9%) and a corresponding higher percentage of public HEIs considering it an asset (41% vs. 36%) (Figure 47).

For administrative staff the trend is similar with slightly higher percentages of private HEIs considering prior international experience a requirement depending on the position or for all positions, but the differences are small (6% vs. 4% for requirement and 30% vs. 25% for requirement depending on the position).

These results show small differences between private and public HEIs, but nonetheless they suggest that prior international experience is valued more at private HEIs than at public ones for both academic and administrative staff.

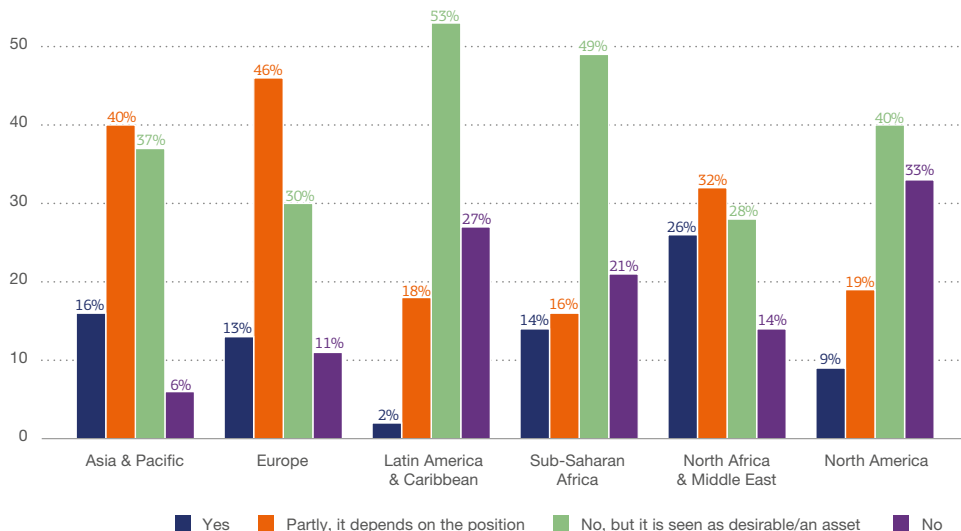
For academic staff, the regional analysis reveals interesting differences among regions.

North Africa & the Middle East is the region with the highest percentage of HEIs requiring prior international experience for promotion (26%); 32% requires it depending on the position, 28% consider it an asset and 14% do not consider it at all.

In Asia & Pacific and Europe, the biggest group of HEIs require prior international experience depending on the position, while in Latin America & the Caribbean, Sub-Saharan Africa and North America the biggest group of HEIs consider it an asset.

**Figure 47**

Do the recruitment and/or promotion policies for academic staff at your institution include prior international experience as a requirement? (Regional results)



North America is the region where the highest percentage of HEIs do not consider prior international experience at all, with a third of them doing so (Figure 47).

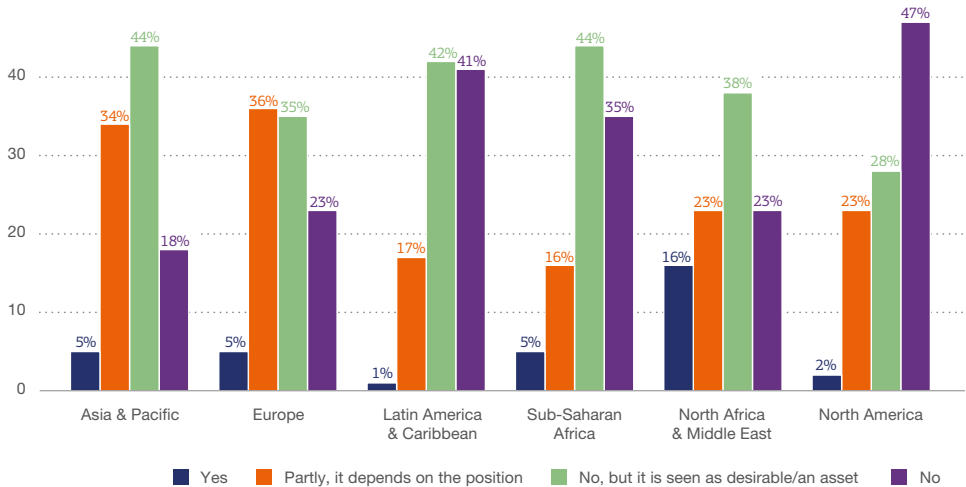
For administrative staff, the level of attention paid to prior international experience is lower in all regions and particularly low in North America where 47% of HEIs do not take it into consideration at all.

As for academic staff, North Africa & the Middle East is the region with the highest percentage of HEIs requiring prior international experience for promotion (16%).

In Europe the biggest group is constituted of HEIs requiring prior international experience for promotion, depending on the position, but differing from academic staff, this is not true in Asia & Pacific anymore (Figure 48).

**Figure 48**

Do the recruitment and/or promotion policies for administrative staff at your institution include prior international experience as a requirement? (Regional results)



### Consideration of foreign language skills

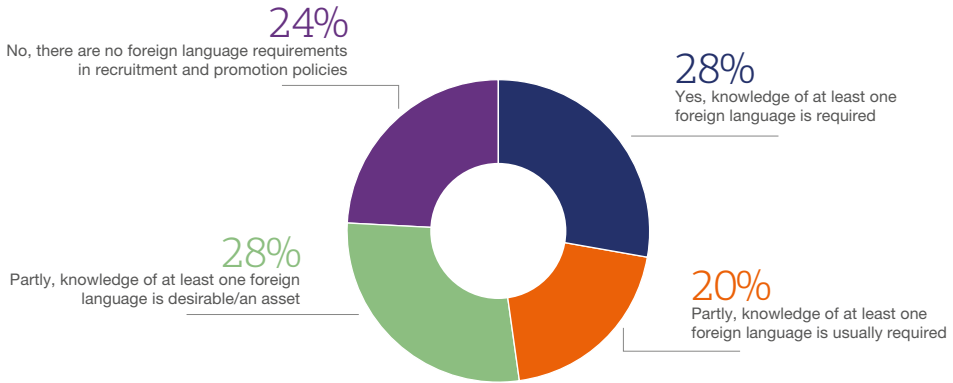
For academic staff, 28% of respondents indicated that knowledge of at least one foreign language is required for recruitment and promotion; 20% reported that it is partly required, while 28% consider it desirable or an asset and 24% stated that there are no foreign language requirements in recruitment and promotion policies for academic staff (Figure 49).

Among administrative staff, 17% of respondents indicated that knowledge of at least one foreign language is a requirement, closely followed by 19% who consider it partly required. Nearly one-third of respondents view foreign language skills as desirable or an asset, while another one-third reported no foreign language requirements for administrative staff recruitment and promotion (Figure 50).

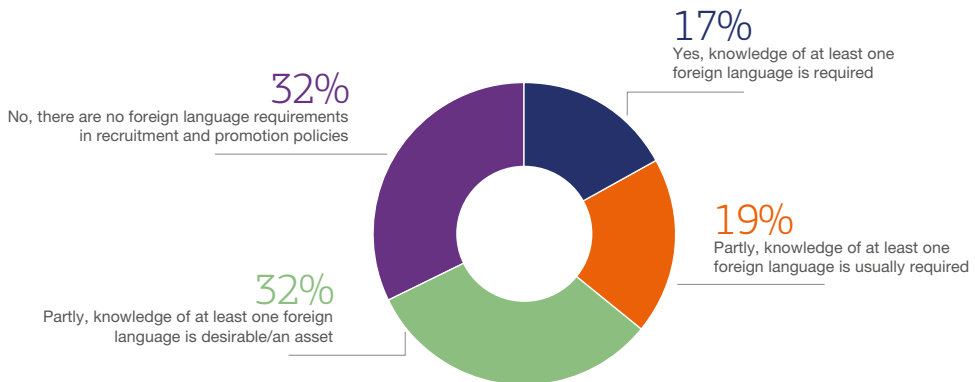


**Figure 49**

Do the recruitment and promotion policies related to academic staff at your institution take into consideration foreign language skills?

**Figure 50**

Do the recruitment and promotion policies related to administrative staff at your institution take into consideration foreign language skills?



### Regional and private vs. public analysis

Concerning language requirements for academic staff, results for private and public HEIs are different. A much higher percentage of private HEIs (34% vs. 25%) require at least one foreign language for recruitment and promotion of administrative staff. For private HEIs this constitutes the biggest group, while responses for public HEIs are more or less equally distributed among the four different options.

Results are also different for administrative staff. Once more a much higher percentage of private HEIs (22% vs. 14%) require at least one foreign language for recruitment and promotion of administrative staff. However, unlike academic staff, this is not the biggest group of HEIs, which is instead those that consider knowledge of at least one foreign language an asset. For public HEIs the biggest groups of HEIs (35%) have no foreign language requirements.

The results of this analysis show that knowledge of at least one foreign language is valued more at private HEIs than at public ones.

For academic staff, the regional analysis reveals huge differences between regions.

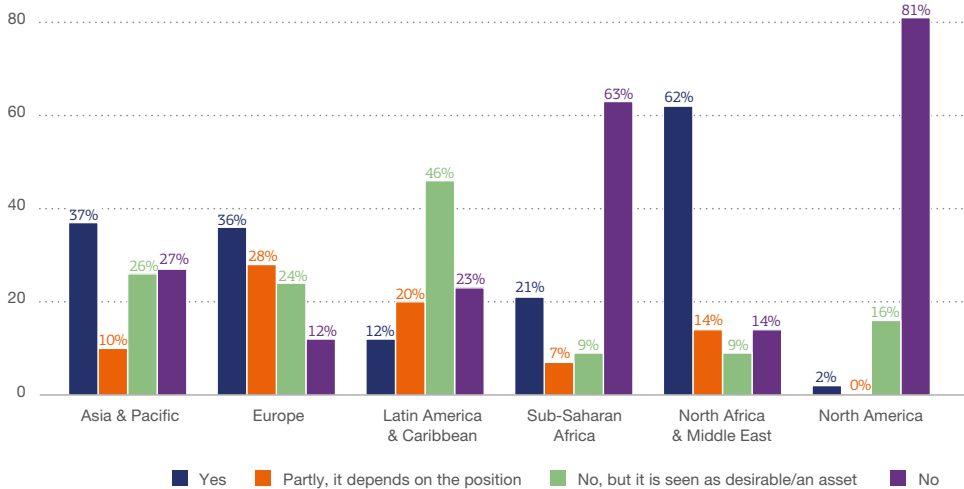
On one hand, 62% of HEIs in North Africa & the Middle East require knowledge of at least one foreign language for recruitment and promotion. On the other, 81% of HEIs in North America do not require it at all. This is also true in Sub-Saharan Africa where 63% of HEIs do not require it at all.

In Latin America & the Caribbean (46%) almost half of HEIs consider knowledge of at least one foreign language an asset and only a minority 32% requires it at least partially.

On the contrary, in Asia & Pacific and Europe the biggest group of HEIs (37% and 36%) require knowledge of at least one foreign language for recruitment and promotion. The difference between the two regions is that Asia & Pacific has a polarised situation with 27% of HEIs not requiring knowledge of at least one foreign language at all, while in Europe this percentage is only 12%, the lowest of all regions (Figure 51).

**Figure 51**

Do the recruitment and promotion policies related to academic staff at your institution take into consideration foreign language skills? (Regional results)



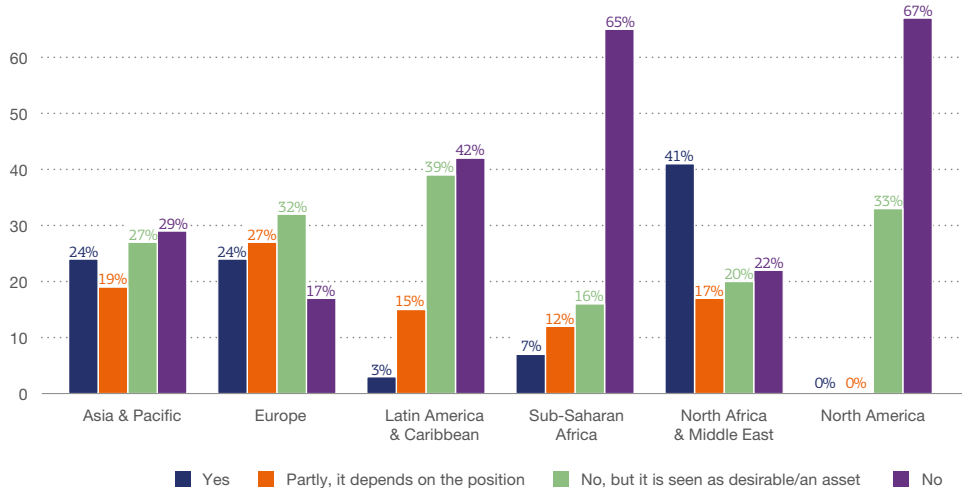
As for administrative staff, once more, North America and Sub-Saharan Africa are the regions where knowledge of at least one foreign language for recruitment and promotion is not considered at all and at the majority of HEIs (67% and 65% respectively). On the contrary North Africa & the Middle East is the region with the biggest percentage of HEIs requiring at least one foreign language for recruitment and promotion (41%).

Unlike academic staff, for administrative staff the biggest group of HEIs in Latin America & the Caribbean is composed of HEIs not considering knowledge of at least one foreign language (42%). This is true also in Asia & Pacific, even if the percentage is lower (29%). In this region the situation is less polarised than for academic staff but there is still a substantial group of HEIs requiring knowledge of at least one foreign language for recruitment and promotion (24%).

Finally, in Europe the biggest group is composed of HEIs considering knowledge of at least one foreign language an asset (32%), but half of HEIs consider it a requirement or at least partially so, depending on the position (Figure 52).

**Figure 52**

Do the recruitment and promotion policies related to administrative staff at your institution take into consideration foreign language skills? (Regional results)



To summarise, these findings indicate a varied emphasis on international experience and foreign language skills in the recruitment and promotion of academic and administrative staff across HEIs. While both aspects are considered important, HEIs that consider them a requirement are a minority. Moreover, there is a notable trend of administrative staff having lower requirements compared to academic staff, both for prior international experience and for foreign language skills.

## Priority of internationalization activities

In order to implement internationalization policies/strategies, various activities have to be put in place. However, not all activities can have the same priority, and respondents were asked to select from a predefined list up to three of the most important internationalization activities in their institutions.

The first result to be pointed out is that no one activity was singled out by a majority of HEIs, showing that there is no overall common priority activity around the world, but, depending on the specific context, activities that are prioritised might be different.

Among these activities, “Outgoing credit-seeking student mobility (student exchanges)” was identified as the most crucial internationalization activity, with 44% of HEIs selecting it as one of their priorities. Following closely, “International research collaboration and outputs (e.g., international co-publications)” was considered significant by 39% of HEIs. Other notable activities with around one-third of respondents included “Strengthening international/intercultural content of curriculum and/or co-curriculum” (33%), “Incoming degree-seeking student mobility (recruitment of international students)” (30%), and “Developing joint and/or double/dual and multiple degree programs with foreign partner institutions” (29%).

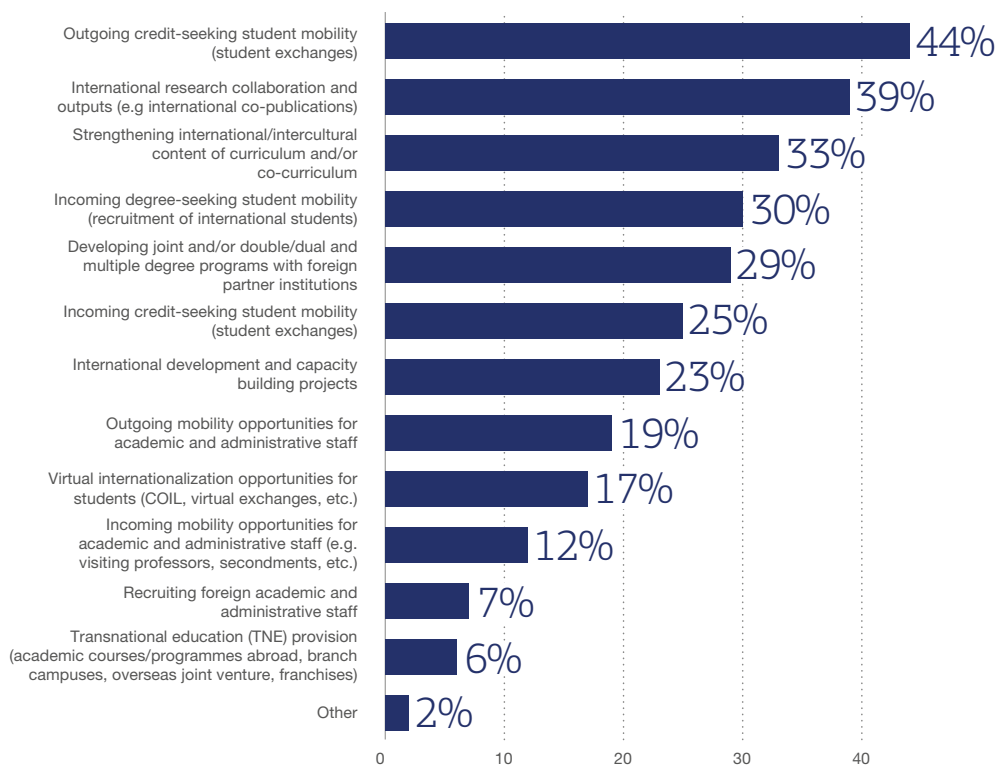
Conversely, certain activities received less emphasis. These include “Incoming credit-seeking student mobility (student exchanges)” (25%), “International development and capacity building

projects” (23%), “Outgoing mobility opportunities for academic and administrative staff” (19%), “Virtual internationalization opportunities for students (COIL, virtual exchanges, etc.)” (17%), and “Incoming mobility opportunities for academic and administrative staff (e.g., visiting professors, secondments, etc.)” (12%).

Furthermore, “Transnational education (TNE) provision (academic courses/programmes abroad, branch campuses, overseas joint venture, franchises)” and “Recruiting foreign academic and administrative staff” were identified as the least emphasised activities, with only 6% and 7% of HEIs selecting them, respectively (Figure 53).

**Figure 53**

Priority of internationalization activities



Amidst varying perspectives on internationalization, it is intriguing to note how respondents’ roles within institutions shape their perceptions of the importance of the most important activities for internationalization.

The prominence of “Outgoing credit-seeking student mobility (student exchanges)” as the overall most significant activity, chosen by 44% of respondents, varies across different positions. This activity is pivotal for deputy heads of institutions (44%), registrars (65%), heads of international offices (55%), and staff members of international offices (54%). However, it is considered less a priority by heads of institutions (28%), professors/researchers (18%), deans (20%), and academic department heads (21%). For these latter positions, except for professors/researchers, “Strengthening international/intercultural content or curriculum and/or co-curriculum” emerges as the primary focus of internationalization. Notably, a substantial 86% of academic department heads prioritise this aspect, while 60% of deans and 47% of heads of institutions do the same.

Regarding the second most important activity, “International research collaboration and outputs (e.g. international co-publications),” there is minimal variation across different roles compared to the global level, except for professors/researchers, for whom it ranks as the most important activity at 68%. Nevertheless, it is important to highlight that, for the majority of positions, no single activity stands out as the sole second most important, as responses are distributed across two or even three activities with the same percentages.

These results show that despite the fact that the survey was promoted as an institutional survey, in the results there is a degree of subjectivity introduced by respondents.

As can be seen in [Table 23](#), the effect of the position of the respondent is visible in the way they give more importance to activities which are familiar and which the specific category of respondent has responsibility for. So, it is not surprising to see international offices giving

**Table 23**

Importance of internationalization activities by respondent position	Head of Institution	Professor/ Researcher	Deputy Head of Institution	Registrar	Dean	Academic Department Head	Head of International Office	Staff Member of the International Office	Global
Outgoing credit-seeking student mobility (student exchanges)	28%	18%	44%	65%	20%	21%	55%	54%	44%
International research collaboration and outputs (e.g. international co-publications)	35%	68%	42%	39%	40%	36%	37%	35%	39%
Strengthening international/intercultural content of curriculum and/or co-curriculum	47%	32%	38%	29%	60%	86%	24%	29%	33%
Incoming degree-seeking student mobility (recruitment of international students)	31%	23%	29%	29%	40%	14%	29%	25%	30%
Developing joint and/or double/dual and multiple degree programs with foreign partner institutions	32%	14%	42%	29%	7%	14%	27%	29%	29%
Incoming credit-seeking student mobility (student exchanges)	20%	9%	23%	39%	7%	36%	27%	30%	25%
International development and capacity building projects	22%	41%	16%	13%	20%	36%	22%	28%	23%
Outgoing mobility opportunities for academic and administrative staff	18%	9%	26%	10%	13%	14%	21%	19%	19%
Virtual internationalization opportunities for students (COIL, virtual exchanges, etc.)	19%	5%	7%	29%	0%	0%	23%	16%	17%
Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)	16%	14%	12%	3%	13%	7%	12%	19%	12%
Recruiting foreign academic and administrative staff	8%	9%	6%	0%	7%	7%	8%	5%	7%
Transnational education (TNE) provision (academic courses/programmes abroad, branch campuses, overseas joint venture, franchises)	8%	0%	5%	6%	13%	14%	6%	1%	6%
Other	0%	5%	0%	0%	0%	0%	2%	1%	2%

highest importance to outgoing credit-seeking student mobility (student exchanges), professors/researchers giving highest importance to international research collaboration and outputs (e.g. international co-publications) and deans and academic department heads giving highest importance to Strengthening international/intercultural content of curriculum and/or co-curriculum.

Finally, it is essential to consider that the number of respondents for each institutional position varies significantly, with the number of replies for some positions being quite low, which could potentially influence the overall trends observed in [Table 23](#).

It is interesting to notice the discrepancy between the results for priority activities and expected benefits of internationalization. Respondents to the 6<sup>th</sup> Global Survey identify “Enhanced international cooperation and capacity building” as the top expected benefit of internationalization, but “International development and capacity building projects” is not one of the top activities.

While it is true that international cooperation and capacity building could be enhanced by research collaboration and outputs (e.g. international co-publications), an activity that is identified as the second most important by respondents, in terms of activities, many HEIs still remain focused on student mobility.

There is a lack of alignment between the expected benefits of internationalization and the activities implemented to achieve them; although in theory HEIs seem to be aware that internationalization is more than student mobility, in practice many of them remain too focused on student mobility.

## Regional and private vs. public analysis

“Outgoing credit-seeking student mobility (student exchanges)” is the most common priority for both private and public HEIs, selected by very similar percentages of HEIs (44% and 45% respectively).

However, the second most common priority activity for private HEIs is “Strengthening international/intercultural content of curriculum and/or co-curriculum” while for public HEIs is “International research collaboration and outputs (e.g. international co-publications)”, which is the third most important for private HEIs.

“Strengthening international/intercultural content of curriculum and/or co-curriculum” comes only in fourth position for public HEIs, after “Incoming degree-seeking student mobility (recruitment of international students)”, which for private HEIs is only the fifth most important. However, percentages are similar and clear conclusions cannot really be made, even if it might be surprising that internationalization of the curriculum seems to be more important for private HEIs than for public ones.

At the regional level, a comparative analysis of the most important activities for internationalization reveals significant variations across regions.

In some regions there is clearly one activity which is chosen by the majority of respondents as the most important. This is the case in North America, where “Incoming degree-seeking student mobility (recruitment of international students),” is chosen as the most important activity by a striking 74% of HEIs. It is also the case in Latin America & the Caribbean where 65% of HEIs choose “Outgoing credit-seeking student mobility (student exchanges)” as the most important, and in Sub-Saharan Africa where 65% of HEIs choose “International research collaboration and outputs” as the most important.

On the contrary, in the remaining regions there is a higher variety of priorities, with none selected by the majority of HEIs.

In Europe “Outgoing credit-seeking student mobility (student exchanges)” is the most important, but only for 43% of HEIs. As written before this activity is also the top activity in Latin America & the Caribbean. In contrast, this activity holds relatively low importance in Sub-Saharan Africa and North Africa & the Middle East, both at 16%, and to a lesser extent in Asia & Pacific, at 27%. In North America this activity is also relatively important as it ranks as the third most important in the region selected by 44% of HEIs.

Notably, in North Africa & the Middle East, “Strengthening international/intercultural content of curriculum and/or co-curriculum” takes the lead as the most important activity at 49%. This activity is also of high significance in Sub-Saharan Africa at 47%.

“International research collaboration and outputs” emerges as the most important activity in Asia & Pacific, chosen by half of HEIs, and as written before notably, in Sub-Saharan Africa, where it stands out with 65%. For other regions, this activity holds lower but still relevant significance, with percentages over 37%.

Other than in North America, “Incoming degree-seeking student mobility (recruitment of international students)”, holds considerable importance also in Asia & Pacific (39%) and Europe (38%).

Latin America & the Caribbean is the only region where “Incoming credit-seeking student mobility (student exchanges)” takes precedence over “Incoming degree-seeking student mobility (recruitment of international students)” and stands as the second most important activity in the region chosen by 38% of HEIs.

Sub-Saharan Africa stands out also because it is the only region where “International development and capacity building projects” is selected by slightly more than half of HEIs, a much bigger percentage than in all other regions.

Lastly, “Virtual internationalization opportunities for students (COIL, virtual exchanges, etc.)” is not really considered a priority in any region but Latin America & the Caribbean, where it is the third most important chosen by 37% of HEIs, a much higher percentage than in any other region.

Overall, the regional analysis highlights diverse priorities for internationalization activities across HEIs worldwide. Student mobility, whether incoming or outgoing, credit or degree-based, emerges as the top priority in most regions. However, while HEIs in North America are focused on student recruitment, as was also confirmed by the results of previous questions, Latin America & the Caribbean and Europe are more focused on exchange opportunities especially for their own students.

On the contrary, student mobility is a priority neither in Sub-Saharan Africa nor in North Africa & the Middle East. These two regions stand out with a greater emphasis on international research collaboration and curriculum strengthening. These activities are also important, albeit to a lesser extent, in all other regions (Table 24).

In Europe, it is interesting to note an interesting discrepancy between the results of the present survey and the EUA Trends survey. While in the IAU survey only 23% of HEIs indicated “Outgoing mobility opportunities for academic and administrative staff” as a priority and an even lower percentage 16% selected “Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)”, the majority of respondents to the EUA trends survey identified staff mobility and exchange as a priority for the institution.

**Table 24**

Three most important internationalization activities	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America	World
Outgoing credit-seeking student mobility (student exchanges)	27%	43%	65%	16%	16%	44%	44%
International research collaboration and outputs (e.g. international co-publications)	50%	37%	33%	65%	46%	37%	39%
Strengthening international/intercultural content of curriculum and/or co-curriculum	35%	35%	23%	47%	49%	26%	33%
Incoming degree-seeking student mobility (recruitment of international students)	39%	38%	14%	19%	23%	74%	30%
Developing joint and/or double/dual and multiple degree programs with foreign partner institutions	29%	29%	26%	33%	20%	47%	29%
Incoming credit-seeking student mobility (student exchanges)	19%	23%	38%	7%	17%	19%	25%
International development and capacity building projects	26%	22%	18%	51%	30%	14%	23%
Outgoing mobility opportunities for academic and administrative staff	11%	23%	21%	7%	16%	7%	19%
Virtual internationalization opportunities for students (COIL, virtual exchanges, etc.)	11%	7%	37%	14%	10%	7%	17%
Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)	15%	16%	8%	14%	13%	2%	12%
Recruiting foreign academic and administrative staff	13%	11%	3%	0%	10%	2%	7%
Transnational education (TNE) provision (academic courses/programmes abroad, branch campuses, overseas joint venture, franchises)	11%	3%	5%	5%	9%	12%	6%
Other	0%	2%	2%	0%	1%	0%	2%

It is difficult to find an explanation for such different results, even if the formulation of the two questions in the two surveys was quite different. More investigation into this subject is needed.

### Comparison with previous Global Survey results

Comparing these results with previous editions presents challenges due to changes to the question format and listed items. In the 6<sup>th</sup> Global survey, participants selected up to three activities of highest importance and could choose from 13 different items, while previous editions required ranking the top three and included a more extensive item list.

For instance, in the 5<sup>th</sup> Global Survey, there were 17 items, some of which were completely removed from the current survey (e.g., participation in international association and international alumni activities) or simply updated (e.g., “Delivery of distance/online education, and/or e-learning courses/programs” into “Virtual internationalization opportunities for students (COIL, virtual exchanges,



etc.); whereas the majority were either combined into a broader item (e.g., “Recruiting fee paying international undergraduate students” and “Recruiting fee paying international postgraduate students” were merged into “Incoming degree-seeking student mobility (recruitment of international students)” ) or divided into more specific items (e.g., “Bi- or multilateral international student exchanges” was divided into “outgoing credit-seeking student mobility (student exchanges)” and “Incoming credit-seeking student mobility (student exchanges)” ). Despite these alterations, these results still offer valuable insights into evolving internationalization priorities among HEIs.

“Outgoing credit-seeking student mobility (student exchanges)” remains at the forefront, originating as the broader item “Bi- or multilateral international student exchanges” in the 4<sup>th</sup> and 5<sup>th</sup> editions. This item existed in the 3<sup>rd</sup> Global Survey as well, though it was combined with attracting international students. The remarkable growth in its importance since the 4<sup>th</sup> Global Survey is evident, as it was not ranked in the top three in any region during that period. In the 6<sup>th</sup> Global Survey, Asia & Pacific, Sub-Saharan Africa, and North Africa & the Middle, are the only three regions where “Outgoing credit-seeking student mobility (student exchanges)” is not in the top three.

“International research collaboration and outputs (e.g., international co-publications)” continues to maintain a position in the top three, remaining consistent ever since the 3<sup>rd</sup> Global Survey. However, it is noteworthy that in Latin America & the Caribbean, this activity has fallen out of the top three since the 5<sup>th</sup> Global Survey.

Nonetheless, the 6<sup>th</sup> Global Survey presents the ascension of “Strengthening international/ intercultural content of curriculum and/or co-curriculum” to a primary role, and the reappearance of “Incoming degree-seeking student mobility (recruitment of international students)” after last appearing in the 3<sup>rd</sup> edition, when grouped with international student exchanges.

Overall, the prevailing significance of international research collaborations and the rising emphasis on enhancing international curricula are key indicators of evolving priorities in higher education internationalization. However, amidst these shifts, the unwavering and increasingly prominent role of student mobility continues as a central and enduring component of internationalization endeavours across most regions (Table 25).

**Table 25**

Rank	3 <sup>rd</sup> Global Survey (rank.)	4 <sup>th</sup> Global Survey (rank.)	5 <sup>th</sup> Global Survey (rank.)	6 <sup>th</sup> Global Survey (%)
1	Outgoing mobility opportunities for students	Outgoing mobility opportunities for students	Bi- or multilateral international student exchanges	Outgoing credit-seeking student mobility (student exchanges) (44%)
2	International student exchanges and attracting international students	International research collaboration	Developing institutional strategic partnerships	International research collaboration and outputs (e.g. international co-publications) (39%)
3	International research collaboration	Outgoing faculty/staff mobility	Outgoing mobility opportunities/learning experiences for students (study abroad, international internships etc.)	Strengthening international/ intercultural content of curriculum and/or co-curriculum (33%)
			International research collaboration	Incoming degree-seeking student mobility (recruitment of international students) (30%)

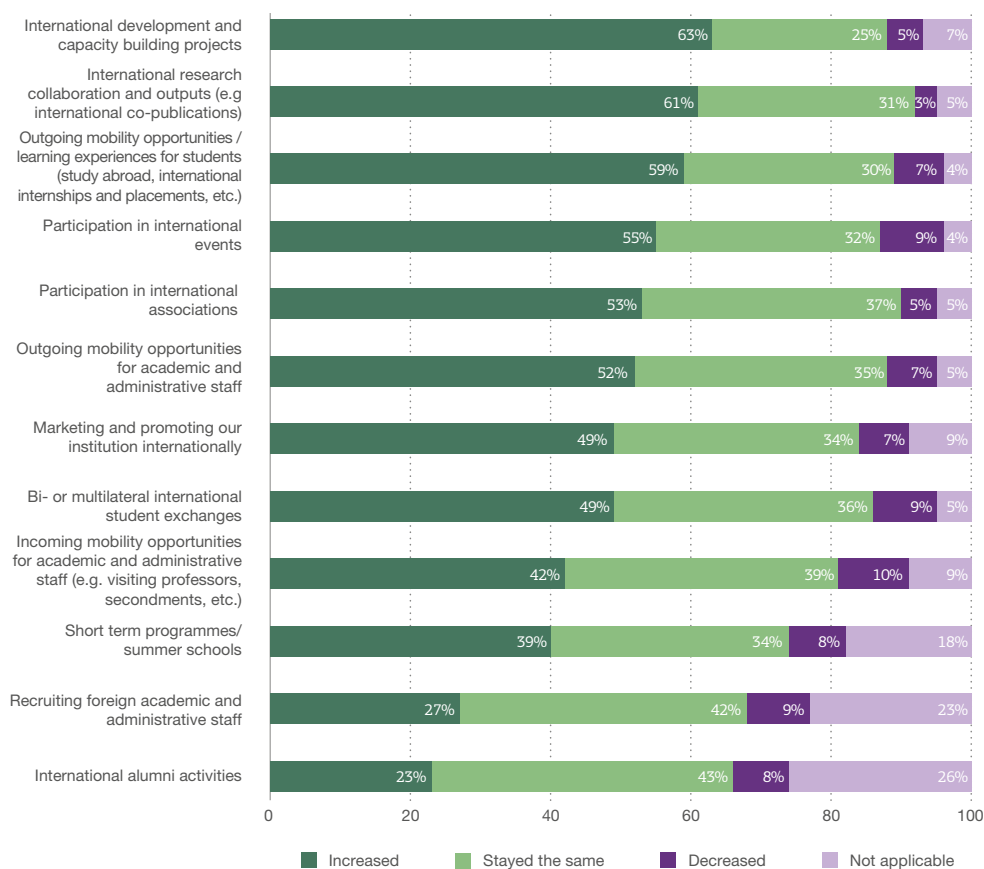
## Change in importance of internationalization activities in the last five years

After having understood the importance given to student mobility as a cornerstone of internationalization, along with the emphasis on international research collaborations and the burgeoning focus on enhancing international curricula in the previous section, it is interesting to observe in this section how the importance of internationalization activities changed over the past five years. Respondents were asked to evaluate the evolving significance of diverse activities for internationalization, considering whether their importance had increased, stayed the same or decreased; they also had the opportunity to choose “not applicable” if the activity is not present within their respective institutions. Notably, while certain activities are the same of those detailed in the previous section, others are combined or entirely new.

Among the 12 activities surveyed, 8 of them experienced an increase at the majority of HEIs where such activities are present, while the remaining four roughly kept the same importance (Figure 54).

**Figure 54**

Change in importance of internationalization activities in the last five years



“International development and capacity building projects” saw the most substantial increase in importance, noted by 63% of respondents. Meanwhile, 25% observed no change, 5% noticed a decrease, and 7% found it not applicable. Similarly, “International research collaboration and outputs (e.g., international co-publications)” demonstrated an upward trend, with 61% reporting increased importance. In contrast, 31% indicated stability, 3% reported a decrease, and 5% considered it not applicable.

The focus on enhancing student experiences through “Outgoing mobility opportunities/learning experiences for students” is evident, as 59% reported increased importance, while 30% indicated no change, 7% noted a decrease, and 4% found it not applicable.

The dynamics of participation in global events also shifted, with 55% of respondents noting increased importance, 32% reporting no change, 9% observing a decrease, and 4% considering it not applicable. The same is true for “Participation in international associations”, with 53% acknowledging increased importance, 37% reporting no change, 5% noting a decrease, and 5% considering it not applicable.

The focus on strengthening faculty and staff involvement in global initiatives was evident for “Outgoing mobility opportunities for academic and administrative staff,” which experienced increased importance for 52% of respondents. In contrast, 35% found no change, 7% reported a decrease, and 5% considered it not applicable. A similar trend emerged for “Marketing and promoting our institution internationally,” where 49% of respondents observed heightened significance, 34% reported no change, 7% observed a decrease, and 9% considered it not applicable.

Notably, activities fostering international exchanges display diverse trends. While 49% of HEIs reported increased importance for “Bi- or multilateral international student exchanges”, with 36% reporting no change, and 9% a decrease (5% considered it not applicable), the importance of “Incoming mobility opportunities for academic and administrative staff” has increased only at 42% of HEIs, while 39% reported no change and 10% observed a decrease (9% considered it not applicable).

The changing landscape of internationalization also extends to education delivery. “Short-term programs/summer schools” saw an increase in importance for 39% of respondents, with 34% perceiving no change, 8% noticing a decrease, and 18% considering it not applicable. “Recruiting foreign academic and administrative staff” elicited varying perceptions, with 27% recognizing increased importance. In contrast, 42% saw no change, 9% reported a decrease, and 23% considered it not applicable.

Finally, the arena of alumni engagement is the less common activity (26% considered it not applicable). It is also the one that saw the least change; in fact, only 23% of HEIs reported an increased importance for “International Alumni Activities”, while 43% reported no change and 8% observed a decrease.

It is interesting to compare the overall level of importance attributed to the identified priorities in the previous section with the change of importance of such priorities in the last five years.

Both research collaborations and student mobility are considered priority activities and their importance has increased in the last five years.

On the contrary, respondents to the 6<sup>th</sup> Global Survey highlight “Enhanced international cooperation and capacity building” as the foremost expected benefit of internationalization, this is complemented by the fact that “International development and capacity building projects”

has experienced the most significant increase in the last five years. However, from the results of the previous section, it is clear that such an increase was not sufficient to make this activity one of the most important yet.

On the positive side, this observation highlights a move towards convergence between envisaged outcomes and actual progress in the realm of internationalization of higher education. Yet, they prompt a crucial consideration: is this alignment really indicative of the intended direction, and do all stakeholders collectively share the same trajectory moving forward?

Exploring these results from various positions within institutions provides a more comprehensive understanding of the multifaceted dynamics at play. The varying viewpoints encourage an intriguing assessment of whether the observed congruence between expected benefits and shifts aligns with a collective vision, or if it reveals nuances that warrant further consideration.

As can be seen in [Table 26](#), even if respondents should have answered from the institutional perspective, there is still some variance in the results showing a certain degree of subjectivity according to the position of different respondents. The differences are not huge and “International development and capacity building projects”, “International research collaboration and outputs (e.g. international co-publications)” and “Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.” clearly result as

**Table 26**

	Head of Institution	Deputy Head of Institution	Registrar	Dean	Academic Department Head	Head of International office	Staff Member of International office	Professor Researcher
International research collaboration and outputs (e.g. international co-publications)	68%	65%	55%	60%	36%	58%	59%	78%
International development and capacity building projects	68%	64%	52%	80%	57%	60%	70%	56%
Participation in international events	62%	53%	52%	60%	43%	53%	61%	41%
Participation in international associations	57%	51%	52%	67%	43%	52%	58%	59%
Marketing and promoting our institution internationally	54%	59%	36%	47%	43%	47%	52%	41%
Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.)	49%	61%	65%	53%	29%	63%	66%	55%
Outgoing mobility opportunities for academic and administrative staff	47%	61%	39%	47%	50%	54%	57%	41%
Bi- or multilateral international student exchanges	45%	58%	58%	40%	36%	51%	57%	23%
Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)	38%	51%	26%	53%	36%	40%	48%	23%
Short term programmes/summer schools	38%	46%	23%	53%	43%	38%	46%	18%
International Alumni activities	34%	23%	19%	47%	14%	18%	28%	23%
Recruiting foreign academic and administrative staff	31%	30%	16%	47%	7%	24%	29%	18%

the activities that have increased the most in importance but in a different order of priority according to the different types of respondents. Specifically:

Heads of institutions, Deans, Academic Department Heads and Staff Members of International offices identified “International development and capacity building projects” as the activity that increased the most. This activity is considered to have increased also by the majority of all other actors.

Professors/researchers and academic leadership (Heads and Deputy heads of institutions) identified “International research collaboration and outputs (e.g. international co-publications)” as the activity that increased the most. The majority of all actors except “Academic Department Head” consider that this activity has increased in importance.

Finally, Registrars and Heads of International offices identified “Outgoing mobility opportunities/ learning experiences for students (study abroad, international internships and placements, etc.)” as the activity that increased the most. Also in this case, this activity is considered to have increased by the majority of actors, except Academic Department Heads and Heads of Institutions (Table 26).

### Regional and private vs. public analysis

Private and public HEIs show an interesting difference when it comes to the change of priorities of internationalization activities.

“International development and capacity building projects” is the activity that increased at the highest percentage of private HEIs (69%), followed by “Outgoing mobility opportunities/ learning experiences for students (study abroad, international internships and placements, etc.)” (65%) and “Participation in international events” (59%). These activities have also increased in importance at public HEIs and they follow the same order with similar percentages, however they are only the second, third and fourth activities in terms of increase in importance. At public HEIs the activity that increased in importance at the highest percentage of HEIs is “International research collaboration and outputs (e.g. international co-publications)” at 64% of HEIs. The percentage of private HEIs where this activity has increased is 57% making it the fourth most common activity in terms of increases for private HEIs. This result is in line with the one for the importance of activity which showed that “International research collaboration and outputs (e.g. international co-publications)” is more important for public than for private HEIs.

At regional level, “International development and capacity building projects” is the activity that increased in importance the most in North Africa & the Middle East (at 80% of HEIs) and Asia & Pacific (71%). In all other regions, its importance also increased at the majority of HEIs, with the exception of North America where it increased only at 49% of HEIs.

“Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.)” is the activity that increased in importance the most in Europe (at 66% of HEIs), Latin America & the Caribbean (59%) and North America (58%). In the other three regions this activity increased in importance at half of HEIs.

Finally, “International research collaboration and outputs (e.g. international co-publications)” is the activity that has increased in importance the most in Sub-Saharan Africa (at 79% of HEIs). In all other regions, its importance also increased at the majority of HEIs, except in North America, where it increased only at 47% of HEIs.

While a direct comparison with the previous Global Survey edition is not feasible due to the introduction of this question in the 6<sup>th</sup> Global Survey, this section bridges the gap by juxtaposing the priorities highlighted earlier with the discernible shifts witnessed since the 5<sup>th</sup> Global Survey in 2018. This comparison sheds light on the evolving panorama of internationalization activities, underscoring the changing dynamics within the higher education landscape.

## Changes in international partnerships in the last five years

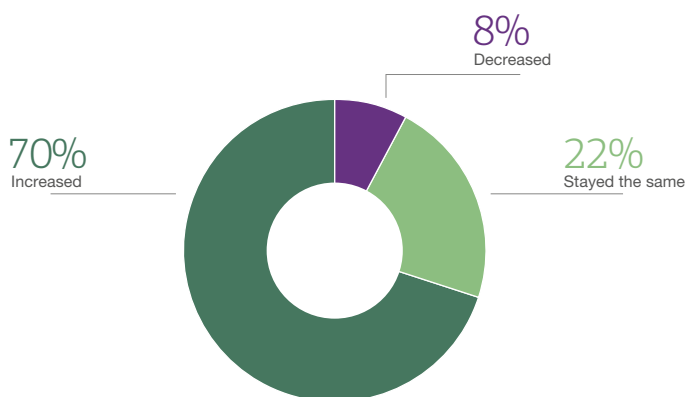
As vital components for internationalization, international partnerships play a pivotal role, driving global academic collaborations, fostering knowledge exchange, research synergies, and many of the activities for internationalization highlighted in the previous sections. This section explores the shifts in institutions' international partnerships, analysing changes over the past five years at both global and regional levels.

At the global level, a comprehensive picture emerges regarding these shifts over the past five years. Among the respondents, only 8% indicate a decrease in partnerships, 22% report that the partnerships remained unchanged, and a substantial 70% note an increase in the number of international partnerships (Figure 55).

These results underscore the global trend of a growing emphasis on international collaborations and partnerships across HEIs.

**Figure 55**

Change in the number of institutional international partnerships over the last five years



### Regional and private vs. public analysis

International partnerships have increased at both public and private HEIs, but slightly more so at private HEIs (75% vs. 67%).

Digging into regional specifics, the results consistently underscore prevailing trends across all regions, emphasising a global drive towards increased international partnerships.

In the Asia & Pacific region, a substantial majority (79%) of respondents noted a surge in their institutions' international partnerships, accompanied by 18% reporting no change and a mere 3% indicating a decrease. Similarly, within North Africa & the Middle East, a noteworthy 78% of respondents reported an upswing in international partnerships, complemented by 16% noting no change and 5% indicating a decrease.

Europe and Sub-Saharan Africa exhibit slightly different patterns, though both highlight a strong commitment to enhancing international partnerships. Across Europe, a notable 73% of respondents indicated an increase in their institutions' international partnerships, while 20% reported no change and 7% observed a decrease. Similarly, in Sub-Saharan Africa, a significant 70% reported a rise, alongside 26% noting no change and 5% indicating a decrease.

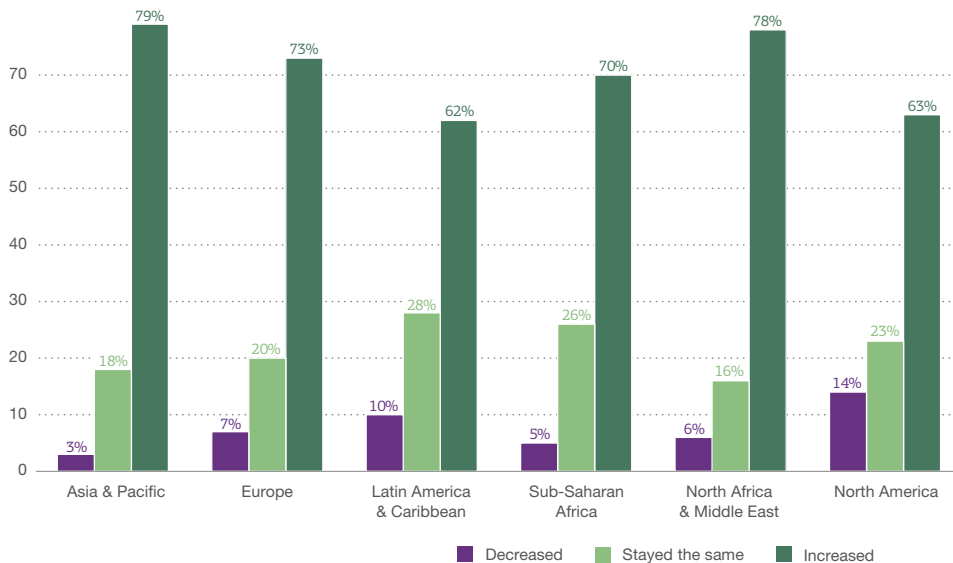
Shifting our focus to the Americas, we see a slightly varied landscape in comparison to the other regions. In North America, 63% of respondents indicated increased international partnerships, juxtaposed by 14% reporting a decrease and 23% noting partnerships remained unchanged. Similarly, in Latin America & the Caribbean, a majority of 62% witnessed an increase, with 28% reporting static partnerships and 10% observing a decrease. These contrasting findings, particularly in North America, highlight the intricate dynamics of international partnerships in the Americas. While the majority of institutions strengthen global connections, others navigate fluctuations in engagement levels (Figure 56).

It is worth mentioning that European results are in line with EUA Trends data as 82% of respondents identified international exchange and collaboration as an institutional priority.

To sum up, the regional results collectively reinforce the global trend of heightened international partnerships, while region-specific variations provide insightful perspectives into the evolving global engagements of institutions.

**Figure 56**

Change in the number of institutional international partnerships over the last five years by region



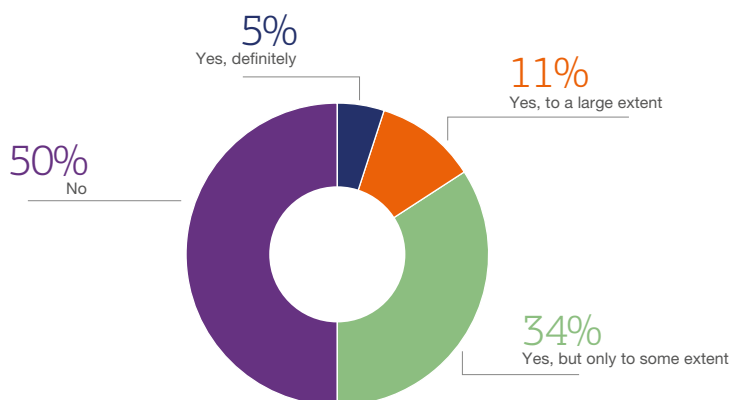
## The role of COVID-19 on the changes in international partnerships

The COVID-19 pandemic's sweeping impact on various facets of higher education and internationalization efforts adds a crucial context to the assessment of changes in international partnerships. This section examines the extent to which these shifts were attributed to the COVID-19 crisis at both global and regional levels.

Globally, half of the respondents (50%) indicated that these changes were not primarily a result of the crisis. On the other hand, 34% believed that the crisis had influenced changes to some extent, 11% perceived a large extent of influence stemming from the crisis, while only 5% asserted that the changes were definitely a consequence of the crisis (Figure 57).

**Figure 57**

Do you think that the changes in international partnerships are mainly a result of the COVID-19 crisis?



It is interesting to analyse the responses to the previous question based on responses to the present questions; 81% of institutions that replied that the changes were definitely a result of the COVID-19 crisis replied that the number of partnerships increased. Similarly, 85% of institutions that replied that the changes were a result of the COVID-19 crisis to a large extent replied that the number of partnerships increased. Although this percentage is lower than the percentage of HEIs that indicated that the number of partnerships increased but was not due to the COVID-19 crisis (94%), it definitely shows that the COVID-19 crisis did not have a major effect on the number of international partnerships, but when it did, it was mainly positive.

The diverse range of responses underscores the intricate relationship between global events, such as the COVID-19 pandemic, and shifts in international partnerships.

### Regional and private vs. public analysis

Private HEIs have been affected by the COVID-19 crisis more so than public ones when it comes to the change in the number of international partnerships, as 56% of them report an effect of COVID-19 while only 46% of public HEIs do. The patterns are similar for both private and public HEIs, but the percentages of private HEIs reporting that these changes were due to COVID-19 to some extent, to a large extent or definitely are all higher than the respective replies from public HEIs.



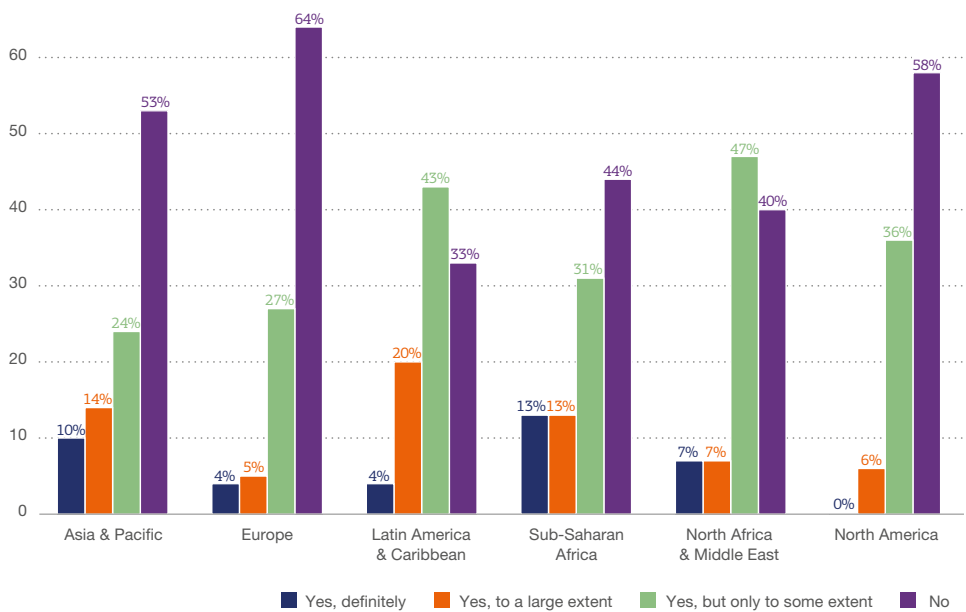
Regionally, trends emerge in the perceptions of the COVID-19 crisis and its impact on international partnerships. In Europe (64%), North America (58%) and Asia & Pacific (53%) the majority of HEIs reported that the changes in the number of international partnerships were not due to the COVID-19 pandemic. In North America no institution reported that the changes were definitely a consequence of the crisis and only 6% perceived a large extent of influence from the crisis.

On the contrary, the region reporting the biggest effect of COVID-19 is Latin America & the Caribbean, with 67% of HEIs reporting an effect, although the majority of them (43%) reported only a small effect (to some extent). In Sub-Saharan Africa, 56% of respondents indicated that changes in international partnerships were a result of the COVID-19 crisis and it is in this region that the highest percentage of HEIs that reported that the changes were definitely a consequence of the crisis (13%) is found. The same percentage perceived a large extent of influence was due to the crisis.

The detailed results per region are shown in [Figure 58](#).

**Figure 58**

Do you think that the changes in international partnerships are mainly a result of the COVID-19 crisis?  
(Regional results)



These results indicate that shifts in international partnerships are not due to the COVID-19 crisis primarily, but also manifest intentional institutional strategies. This complex interplay underscores the multifaceted nature of international partnerships in the face of global challenges.



# INTERNATIONALIZATION OF TEACHING AND LEARNING: ACTIVITIES



# Part C.

## INTERNATIONALIZATION OF TEACHING AND LEARNING: ACTIVITIES

The present part is the first part that investigates internationalization of teaching and learning and it focuses on internationalization activities such as collaborative degree programmes, Trans-National Education (TNE) and virtual internationalization. For some of these aspects (e.g. TNE), it also investigates the effect of the COVID-19 pandemic. The main results are reported below.

### Main results part C

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#### *Collaborative degree programmes*

- The majority of HEIs at global level (63%) offer either joint degree programmes, or dual/double and multiple degree programmes, or both types of programmes with international partners. Collaborative degrees are more common at public than at private HEIs (67% vs. 57%). However, at regional level there are substantial differences with 88% of HEIs offering them in North America but only 49% of HEIs in Latin America & the Caribbean.
- The majority of HEIs offer dual/double and multiple degree programmes (56%), while almost half (49%) offer joint degree programmes.
- More public than private HEIs offer both joint degrees (52% vs. 45% of all respondents) and dual/double and multiple degrees (60% vs. 49% of all respondents).

#### *Changes in collaborative degree programmes in the last five years*

- For both types of collaborative degrees, half or slightly more than half of HEIs reported an increase in numbers, while the others reported stability. Very few HEIs reported a decline in numbers.
- Higher percentages of public HEIs are reporting an increase in the number of collaborative degrees.
- Asia & Pacific distinguish itself as the only region where the majority of HEIs reported stability in collaborative degrees, both for joint and dual/double and multiple degree programmes. In all other regions dual/double and multiple degree programmes increased in numbers at the biggest group of HEIs, while for joint degree programmes this is true only in North Africa & the Middle East, Sub-Saharan Africa and Europe.

#### *Impact of online collaboration on collaborative degree programmes*

- About half of respondents offering collaborative degrees indicated that the introduction or increase of online collaboration has influenced collaborative degrees.
- Online collaboration had an impact on collaborative degrees at the majority of private HEIs (57%) but not at public ones (46%).
- At regional level, two groups of regions emerge: in the first group, composed of Europe and North America, the majority of respondents reported no significant impact from

online collaboration on collaborative degree; in the second group, composed of all other regions, the opposite is true.

### ***Consequences of the increase in online collaboration on collaborative degree programmes***

- Globally, the increase in online collaboration has introduced several challenges and changes for academic institutions, with the most common being that this increase has presented challenges for academic staff in adopting new teaching methods.
- At regional level, the above-mentioned conclusion is true in all regions except North America. In North America the majority of HEIs indicated that the increase in online collaboration has led to the inclusion of a new online component to existing joint degree programmes with international partners, this is true also in Asia & Pacific, North Africa & the Middle East and Sub-Saharan Africa, but not in Europe and Latin America & the Caribbean.

### ***Transnational education (TNE)***

- Only 27% respondents reported that their institution is involved in transnational education (TNE), adding that the adoption of such an internationalization practice at global level is not yet widespread.
- Overall, the adoption of TNE by region shows varying rates but, similar to the global context, remains relatively limited across all regions.

### ***Types of transnational education (TNE)***

- Among institutions engaged in TNE, Articulation Programs and Joint Universities are the most common, while Franchise Programs and International Branch Campuses are the least common. Nonetheless, all types of TNE showed an increased importance at global level.
- Private and public HEIs show a similar pattern, with Articulation Programs and Joint Universities more common than Franchise Programs and International Branch Campus. However, for private HEIs all types of TNE have increased in importance at the majority of HEIs that have them, while for public HEIs only the importance of Articulation Programs and Joint Universities has grown over the past five years, while for Franchise Programs and International Branch Campus it has not changed.

### ***The role of COVID-19 on the changes in different TNE types***

- Globally, respondents split in two, with almost half of HEIs reporting that changes in different TNE types were due to COVID-19.
- Private HEIs have been affected more by COVID-19 than public HEIs when it comes to TNE.
- The influence of the COVID-19 crisis on TNE involvement exhibits strong regional variations. Notably, North Africa & the Middle East and Latin America & the Caribbean have emerged as the regions most impacted by the crisis. Conversely, North America stands out as the region with the least impact, followed by Sub-Saharan Africa, and subsequently Europe.

### ***Virtual internationalization***

- Globally, a substantial majority (77%) of respondents affirm their institutions' engagement with virtual internationalization opportunities.

- Globally, the majority of all HEIs that replied to the survey offer virtual exchanges (69%), COIL (60%) and online preparatory courses (56%), but not MOOCs (46%) and online degree programmes offered by institution to students in other countries (45%).
- At regional level, the majority of HEIs engage in virtual internationalization in all regions, but with some differences, from 58% in North Africa & the Middle East to almost all HEIs in Latin America & the Caribbean (91%).
- Virtual exchanges are the most common activity in all regions, offered by a minimum of 53% of HEIs in North America to a maximum of 84% of HEIs in Latin America & the Caribbean.

### *Change in importance of virtual internationalization opportunities over the past five years*

- At global level, all activities also increased in importance over the past five years with virtual exchanges being the activity that increased in importance at the highest percentage of HEIs (80%).
- At regional level, online preparatory courses (language training, etc.) offered by the institution to students in other countries, Collaborative Online International Learning (COIL) and virtual exchanges have increased in importance at the majority of HEIs in all regions.

### *The role of COVID-19 on changes in importance of virtual internationalization opportunities*

- Globally, a substantial majority of participants (87%) indicated that changes in importance of virtual internationalization opportunities and COVID-19 are linked to different degrees.
- In all regions the majority of HEIs reported that changes in importance of virtual internationalization opportunities and COVID-19 are linked to different degrees, with Latin America & the Caribbean being the region with the highest percentage of HEIs reporting a link between COVID-19 and changes in importance of virtual internationalization opportunities, with 24% of HEIs indicating that changes were definitely due to COVID-19, and as many as 45% reporting that changes were due to COVID-19 to a large extent.

## Collaborative degree programmes

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Another area of internationalization investigated at a deeper level in the 6<sup>th</sup> Global Survey is the offer of collaborative degree programs (i.e., joint degree programmes<sup>8</sup> and/or dual/double and multiple degree programmes<sup>9</sup>) with international partners.

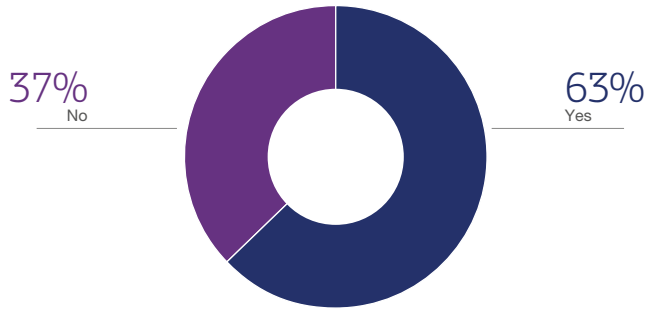
Sixty-three percent of respondents offer either joint degree programmes, or dual/double and multiple degree programmes, or both types of programmes with international partners (Figure 59).

8. A joint degree programme is developed collaboratively by two or more partner HEIs; graduates are awarded one joint qualification.

9. A dual/double or multiple degree programme is developed collaboratively by two or more partner HEIs; graduates are awarded qualifications at equivalent level by all HEIs involved.

**Figure 59**

Does your institution offer collaborative degree programmes with international partners?



### Regional and private vs. public analysis

Collaborative degrees are more common at public than at private HEIs (67% vs. 57%).

At regional level, the highest percentage of HEIs having collaborative degrees is found in North America (88%), while the lowest is in Latin America & the Caribbean, where only 49% have them (Table 27).

**Table 27**

Sub-Saharan Africa	Asia & Pacific	Europe	Latin America & the Caribbean	North Africa & the Middle East	North America
56%	60%	72%	49%	64%	88%

### Comparison with the 4<sup>th</sup> and 5<sup>th</sup> Global Survey results

In the 4<sup>th</sup> Global Survey, HEIs were asked to reply separately about their offerings of joint and dual/double and multiple degree programs. In the 5<sup>th</sup> Global Survey, HEIs were asked a single question regarding the presence of either or both types of collaborative degrees. However, the 6<sup>th</sup> Global Survey altered the approach by simply asking respondents whether their institutions offer collaborative degree programs in general.

In the 5<sup>th</sup> Global Survey, 57% of respondents confirmed the provision of joint or dual/double and multiple degree programs. Notably, this percentage marked a considerable decline compared to the 4<sup>th</sup> Global Survey, where 64% of HEIs indicated offering joint degrees and a striking 80% declared the provision of dual/double and multiple degree programs. The 6<sup>th</sup> Global Survey reflected a modest recovery with 63%.

While the drop between the 4<sup>th</sup> and 5<sup>th</sup> editions could partly be attributed to variations in regional distribution among respondents (in the 4<sup>th</sup> edition almost half of respondents were from Europe and there were also many HEIs from North America, regions reporting the highest percentages of collaborative degrees), a substantial decline persisted, especially concerning dual/double and multiple degree programs. For context, in the 5<sup>th</sup> Global Survey, no region reported that 80% of HEIs offered dual/double and multiple degree programs.

Considering that the increase from the 5<sup>th</sup> Global Survey to the present edition is a mere 6%, it remains uncertain whether the decline in the percentage of HEIs offering collaborative degrees between the 4<sup>th</sup> and 5<sup>th</sup> editions was genuine or potentially influenced by survey design changes. Further research would be needed to clarify this trend.

## Changes in collaborative degree programmes in the last five years

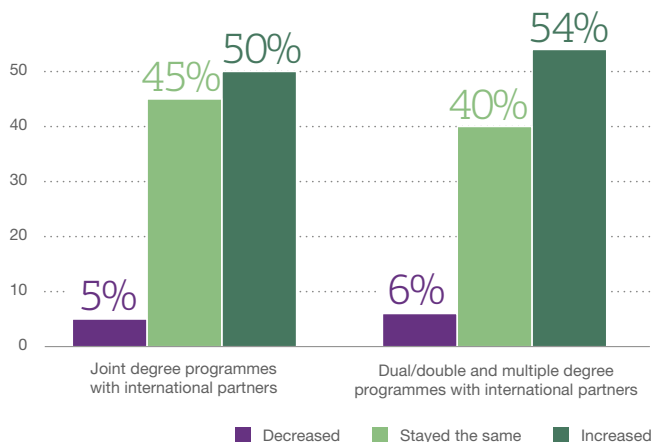
Respondents who indicated that their institutions offer collaborative degree programs were further questioned about changes in the number of these programs over the past five years. The responses were categorised into two types:

1. Joint degree programs with international partners: 86% of respondents to this question, which corresponds to 49% of all respondents to the survey, offer this type of collaborative degree programme. Among those offering this type of degree programme, half of them reported an increase in numbers, 45% reported no change in their numbers and only 5% reported a decrease;
2. Dual/Double and multiple degree programs with international partners: more HEIs offer these types of degrees (92% of respondents to this question, which corresponds to 56% of all respondents to the survey). Similarly, among institutions offering this type of degree programme, more than half (56%) reported an increase in numbers, 45% reported no change in their numbers and only 6% reported a decrease.

Overall, these findings suggest that while there is a notable trend of growth in both types of collaborative degree programmes at institutions that offer them, the increase is particularly pronounced for dual/double and multiple degree programs. However, it is essential to consider these percentages in the context of the specific institutions surveyed and regional variations (Figure 60).

**Figure 60**

Joint degree programmes with international partners and dual/double and multiple degree programmes with international partners



## Regional and private vs. public analysis

Before comparing results between public and private institutions and their collaborative degree programs, it is important to note that responses from public institutions were slightly more than double the number of responses from private institutions (307 vs. 150). This is due to the fact that, as seen in the previous section, collaborative degrees are more common at public than at private HEIs (67% vs. 57%).

More public than private HEIs offer both joint degrees (52% vs. 45% of all respondents) and dual/double and multiple degrees (60% vs. 49% of all respondents). The majority of public HEIs offering collaborative degrees reported an increase in their numbers for both joint and dual/double and multiple degrees. On the contrary, for private HEIs, the percentages reporting an increase and stability in the number of collaborative degrees are very similar both for joint and dual/double and multiple degrees but for the latter the highest percentage reported no change (48% vs. 47% reporting an increase).

Overall, these findings underscore the importance for institutions, regardless of their public or private status, to carefully consider their internationalization strategies when it comes to collaborative degree programmes. Although both private and public institutions have made progress in this area, the stability of programmes at private institutions may account for their slightly lower program increase compared to public institutions, which exhibit a somewhat stronger commitment to expanding collaborative degrees and especially dual/double and multiple degree programmes.

At regional level, the first thing to note is that joint degree programmes are present at the majority of all HEIs that replied to the survey in all regions, except Latin America & the Caribbean, while dual/double and multiple degree programmes are present at the majority of HEIs in all regions, except Latin America & the Caribbean and Sub-Saharan Africa.

Sub-Saharan Africa and North Africa & the Middle East diverge from all other regions regarding the presence of collaborative degrees. In fact, in these two regions, joint degree programmes are more common than dual/double and multiple degree programmes, while in all other regions the opposite is true.

The lowest percentage of HEIs offering joint degree programmes is in Latin America & the Caribbean (37%), while the highest (63%) is in North America. Concerning dual/double and multiple degree programmes, 88% of North American HEIs offer this type of collaborative degree, while the lowest percentage is to be found in Sub-Saharan Africa (35%) (Table 28).

Table 28

Presence of collaborative degrees	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Joint degree programmes with international partners	52%	54%	37%	51%	61%	63%
Dual/double and multiple degree programmes with international partners	55%	66%	42%	35%	58%	88%

It is interesting that the percentage of European HEIs offering joint degrees (57%) is similar to that found in the EUA trends report (54%).



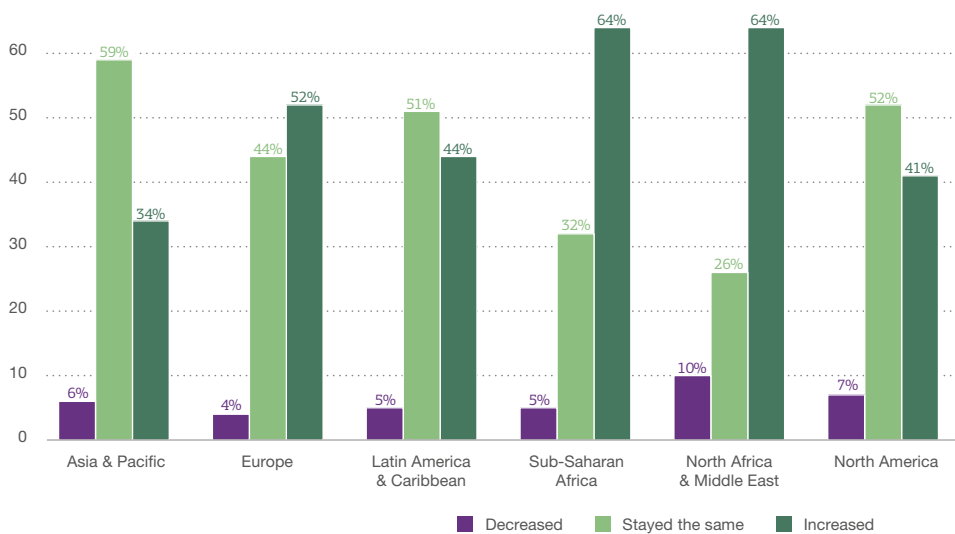
To evaluate regional differences, it is easier to look at joint degree programmes and dual/double and multiple degree programmes separately and take into consideration only those HEIs offering them.

### 1. Joint degree programmes

Two groups of regions are identifiable for these types of collaborative degree programmes. In North Africa & the Middle East, Sub-Saharan Africa and Europe, joint degree programmes have increased at the majority of HEIs. On the contrary, in Asia & Pacific and the Americas they remained stable at the majority of HEIs (Figure 61).

**Figure 61**

Change in the number of joint degree programmes by region



### 2. Dual/double and multiple degree programmes

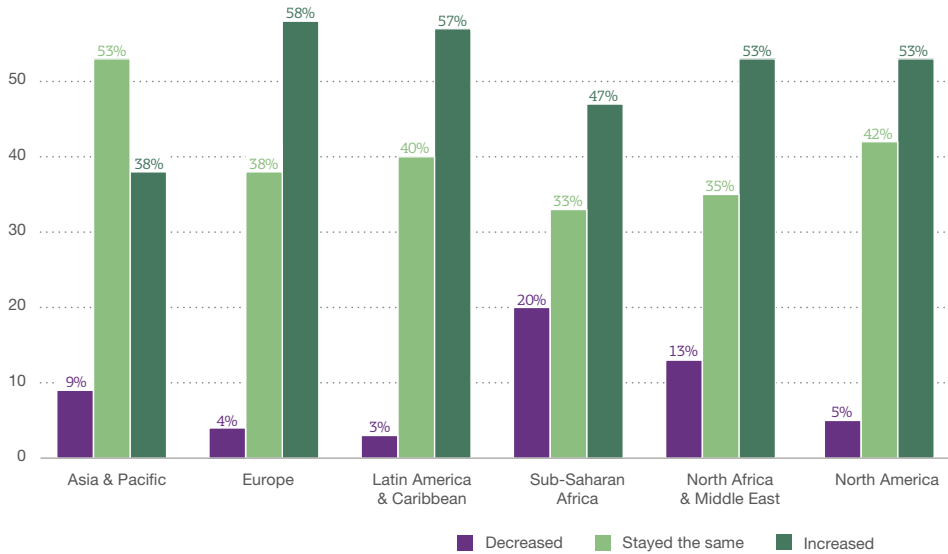
Asia & Pacific is the only region where the majority of HEIs reported stability in terms of dual/double and multiple degree programmes, and in all other regions the biggest percentage reported an increase. In Sub-Saharan Africa this group is composed of slightly less than half of HEIs (47%) while in all other regions they constitute the majority. The highest percentage of HEIs reporting an increase is to be found in Europe (Figure 62).

Comparing the regions overall, Asia & Pacific distinguish itself as the only region where the majority of HEIs reported stability in collaborative degrees, both for joint and dual/double and multiple degree programmes. On the contrary, Europe and North Africa & the Middle East are the regions where the increase in the number of collaborative degrees is more common. This is true also for Sub-Saharan Africa. Conversely, in the Americas the majority of HEIs reported an increase in dual/double and multiple degree programmes but stability in joint degree programmes.

These results show different priorities in terms of collaborative degree programmes in the different regions, but overall, they underline the importance of such programmes in all regions.

**Figure 62**

Change in the number of dual/double and multiple degree programmes by region



## Impact of online collaboration on collaborative degree programmes

As [Figure 63](#) shows, regarding the impact of online collaboration on joint degree programmes or dual/double and multiple degrees, respondents are split almost equally, with roughly half of them indicating that the introduction or increase of online collaboration has influenced these programmes at their respective institutions and the other half reporting it has not. Therefore, drawing definite conclusions on how online collaboration is shaping collaborative degree programs across institutions is challenging.

However, a deeper examination of the data reveals potential differences between public and private institutions, as well as variations across different regions ([Figure 63](#)).

**Figure 63**

Has the introduction or increase of online collaboration impacted on joint degree programmes or dual/double and multiple degrees at your institution?



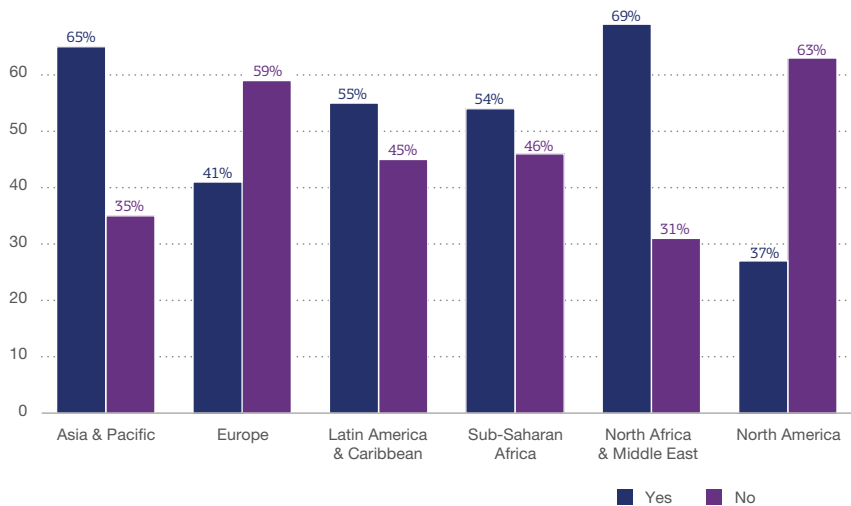
## Regional and private vs. public analysis

Differences between public and private institutions in their response to the impact of online collaboration on joint degree programmes or dual/double and multiple degrees are not substantial; however, an intriguing trend emerges. Private institutions, with 57% of respondents indicating an impact, slightly outpace public institutions where 46% report an impact.

When examining regional responses, a more nuanced picture is evident, showcasing different situations in different regions (Figure 64).

**Figure 64**

Has the introduction or increase of online collaboration impacted on joint degree programmes or dual/double and multiple degrees at your institution? (Regional results)



Europe and North America emerge as the only two regions where the majority of respondents reported no impact from online collaboration at their respective institutions, with 59% and 63%, respectively.

In contrast, Asia & Pacific and North Africa & the Middle East stand out as the regions with the highest percentage of respondents indicating an impact, at 65% and 69%, respectively. Similarly, in Latin America & the Caribbean and Sub-Saharan Africa the majority of respondents indicated an impact.

A trend seems to emerge showing that online collaboration had less impact in Europe and North America than in all other regions. Regardless of the magnitude of the impact online collaborations may have had at their respective institutions, it is crucial to delve deeper into understanding the nature and consequences of this impact and this is done in the next section.

# Consequences of the increase in online collaboration on collaborative degree programmes

Globally, the increase in online collaboration has introduced several challenges and changes for academic institutions.

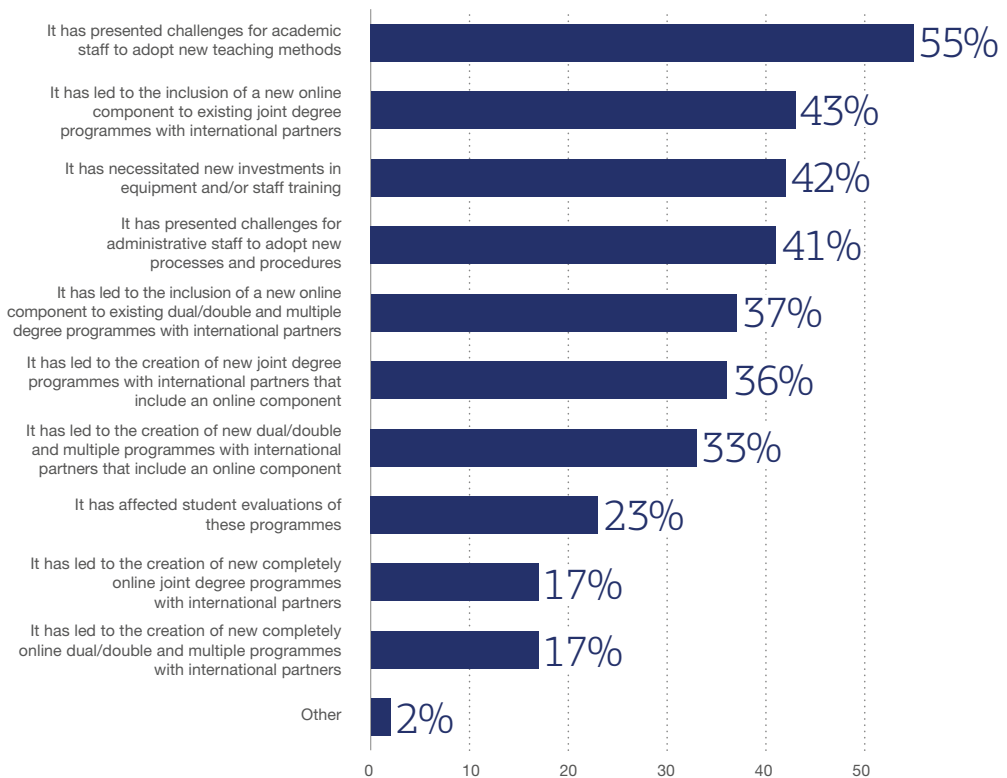
The most common one, indicated by over half of respondents (56%), is that this increase has presented challenges for academic staff in adopting new teaching methods.

All other options were selected by a minority of respondents but it is worth mention that about 40% of respondents reported various additional impacts, including the inclusion of a new online component in existing joint degree programs with international partners, new investments in equipment and staff training to support online collaboration effectively, and challenges for administrative staff in adapting to new processes and procedures.

However, the impact of online collaboration on joint degree and/or dual/double and multiple programs with international partners had a lesser impact on student evaluations of these programs (23%), as well as on the creation of entirely new joint degree and/or dual/double and multiple programs with international partners that include an online component (17%) (Figure 65).

**Figure 65**

Impact of the increase in online collaboration on joint degree programmes or dual/double and multiple degrees



Overall, these results highlight the complex and diverse impact of increased online collaboration across HEIs. They call for investments in technology, staff development, and administrative flexibility. Despite these challenges, it would be interesting to further investigate the potential of online collaboration to elevate educational quality and bolster internationalization efforts.

### Regional and private vs. public analysis

No major differences are visible for private and public HEIs.

The regional analysis is challenging because of the low number of responses in some regions. However, some interesting indications emerge. The majority of HEIs in all regions except North America indicated that the increase in online collaboration has presented challenges for academic staff when adopting new teaching methods. In North America the majority of HEIs stated that it has led to the inclusion of a new online component to existing joint degree programmes with international partners, and this is true also in Asia & Pacific, North Africa & the Middle East and Sub-Saharan Africa, but not in Europe and Latin America & the Caribbean. Finally, it is worth mentioning that in Sub-Saharan Africa the majority of HEIs reported that the increase in online collaboration has demanded new investments in equipment and/or staff training.

## Transnational education (TNE)

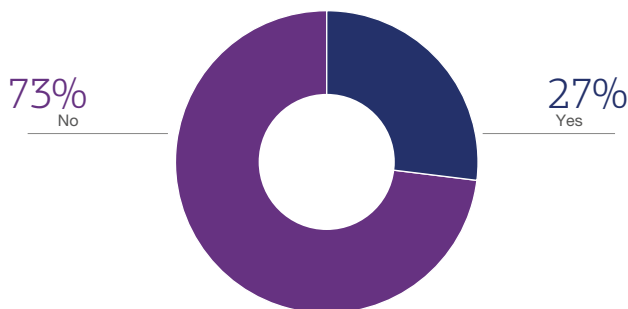
Transnational education (TNE) is defined as “The mobility of education programs and institutions/providers across international borders.” (Knight and McNamara, 2017 p.7).

It can assume different forms, which are analysed in the following section, but first of all participants to the survey were asked if their institutions are involved in TNE or not.

Notably, only 27% respondents reported that their institution is involved in TNE, a sign that adoption of such an internationalization practice at global level is not yet widespread (Figure 66).

**Figure 66**

Is your institution involved in transnational education (TNE)?



### Regional and private vs. public analysis

Slightly more private HEIs replied that they offer TNE than public ones, but in both cases, they are a minority (30% vs. 25%).

At the regional level, North America and North Africa & the Middle East lead with more than one-third (37% and 36%, respectively) reporting TNE involvement.

Asia & Pacific and Sub-Saharan Africa closely follow, with around one-third (34% and 33%, respectively) expressing TNE engagement.

Finally, in Europe and Latin America & the Caribbean, a quarter (25%) and just over one-fifth (22%) of respondents reported taking part in TNE.

Overall, the adoption of TNE by region shows varying rates but, similar to the global context, remains relatively limited across all regions (Table 29).

Table 29

Sub-Saharan Africa	Asia & Pacific	Europe	Latin America & the Caribbean	North Africa & the Middle East	North America
33%	34%	25%	22%	36%	37%

### Comparison with the 5<sup>th</sup> Global Survey results

Before comparing these results with those of the 5<sup>th</sup> Global Survey it is worth mentioning that the question was changed in the 6<sup>th</sup> Global Survey, as respondents could no longer reply “Don’t know” as was the case for the 5<sup>th</sup> edition.

Despite this, the percentage of institutions involved in TNE has remained relatively stable, with 27% in the 6<sup>th</sup> Global Survey compared to 28% in the 5<sup>th</sup> edition.

At regional level, North America remains the region with the highest percentage of HEIs indicating involvement in TNE, even if this percentage has decreased from 44% to 37%. On the contrary, Latin America & the Caribbean remains the regions with the lowest percentage, even if it has increased from 17% to 22%. However, due to the low number of HEIs responding per region, these changes might not be significant.

## Types of transnational education (TNE)

Respondents who replied positively on their institutions’ involvement in TNE were asked about the changing importance of the various types of TNE over the last five years.

Four different types of TNE were proposed to the respondents:

- Articulation programs<sup>10</sup>
- Franchise programs<sup>11</sup>
- International Branch Campus<sup>12</sup>

10. A collaborative agreement between two HEIs in which students take the first part of their program at home and the second part abroad (3+1, 2+2, etc.).

11. The foreign sending HEI/provider has primary responsibility for the design, delivery and academic oversight of academic programmes offered in the host country. Qualification is awarded by foreign sending HEI. (Knight and McNamara, 2017 p.7).

12. An entity that is owned, at least in part, by a foreign higher education provider; operated in the name of the foreign education provider; and provides an entire academic programme, substantially on site, leading to a degree awarded by the foreign education provider. (C-BERT definition).

- Joint universities<sup>13</sup>

Before analysing the changes in importance of the different types of TNE, it is worth mentioning which types are the most and least common:

- Articulation programs and joint universities are the most common, present at the majority of HEIs that have TNE (64% and 62% respectively, both around 17% of all HEIs the replied to the survey).
- Franchise Programs and International Branch Campus are the least common, present at only 44% and 34% of HEIs that offer TNE respectively (which corresponds to only 12% and 9% of all HEIs that replied to the survey).

Considering only those HEIs that are engaged in a certain type of TNE, Joint University showed a substantial increase in perceived importance, with more than half of respondents (57%) indicating a heightened significance. Similarly, Articulation Programs experienced a noteworthy rise in importance at slightly more than half of respondents (52%).

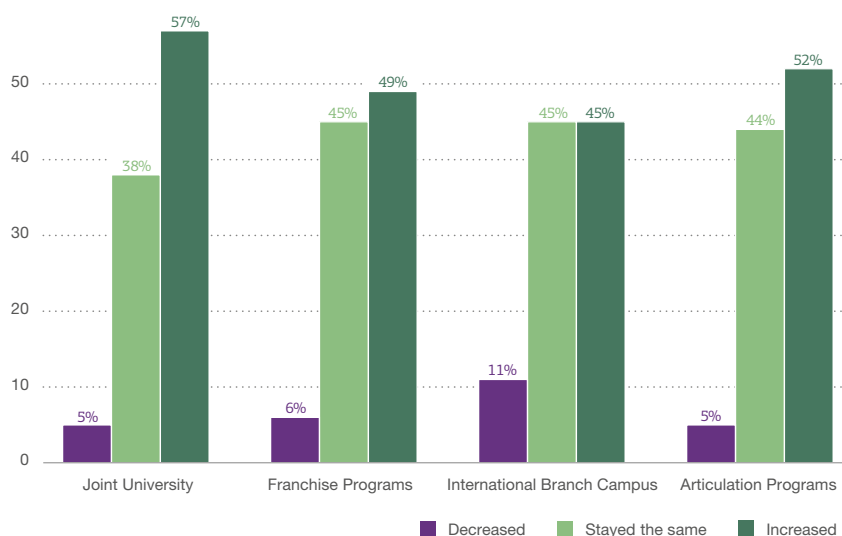
For Franchise Programs the biggest group of HEIs also reported an increase, but they are slightly less than half (49%) while for International Branch Campus the percentage of respondents that reported increase and stability is the same (45%).

The percentage of HEIs reporting a decrease in importance is low for all types of TNE.

Overall, these results highlight the varying popularity of different TNE programs, as well as insights into the changing perceptions of the significance of various TNE types within institutions (Figure 67).

**Figure 67**

Change in importance of different TNE types over the past five years



13. A HEI co-organised and co-founded by both a domestic and a foreign HEI/provider collaborating on academic programmes. Qualifications can be awarded by either or both domestic and foreign country HEIs.

## Regional and private vs. public analysis

Private and public HEIs show a similar pattern, with Articulation Programs and Joint Universities more common than Franchise Programs and International Branch Campus. The most common forms of TNE are Articulation Programs at private HEIs (22% of all private HEIs that replied to the survey) and Joint Universities at public HEIs (16%). The least common are Franchise Programs for both private and public HEIs (10% and 8% respectively).

Considering the change in importance, private and public HEIs show interesting differences. At private HEIs the importance of all types of TNE has increased at the majority of HEIs with Franchise Programs being the ones that increased in importance at the highest percentage of HEIs (70%). On the contrary, at public HEIs only Articulation Programs and Joint Universities have increased in importance in the majority of HEIs while Franchise Programs and International Branch Campus have remained stable.

In conclusion, for public HEIs Articulation Programs and Joint Universities are the most common form of TNE and their importance has grown over the past five years, while Franchise Programs and International Branch Campus are not so common and their importance has not changed.

On the other hand, for private HEIs, Articulation Programs and Joint Universities are also the most common and their importance has increased in the last five years, but despite being less common, Franchise Programs and International Branch Campus have grown in importance at a higher percentage of HEIs. This result suggests that these types of TNE might become more common in the future at private HEIs, but probably not at public HEIs.

Performing an in-depth regional analysis presents challenges due to the limited number of responses from certain regions and the fact that the engagement in TNE is different for different regions of the world as seen before. However, despite these constraints, valuable insights can still be derived from the available dataset.

Articulation Programs are the most common form of TNE in Asia & Pacific (at 24% of all HEIs that replied to the survey), Latin America & the Caribbean (16%) and North America (28%), while Joint University is the most common in Europe (16%) and Sub-Saharan Africa (28%). It is also the most common in North Africa & the Middle East where it shares the first place with International Branch Campus (30%).

In all regions except Sub-Saharan Africa, the least common form of TNE is Franchise Programs, but the presence of such programmes varies from 26% of all HEIs that replied to the survey in Sub-Saharan Africa to only 4% in Latin America & the Caribbean (Table 30).

**Table 30**

Presence of different types of TNE	Asia & Pacific	Europe	Latin America & the Caribbean	North America	North Africa & the Middle East	Sub-Saharan Africa
Joint University	18%	16%	11%	14%	30%	28%
Franchise Programs	6%	7%	4%	9%	25%	26%
International Branch Campus	11%	10%	5%	19%	30%	21%
Articulation Programs	24%	12%	16%	28%	26%	21%



Considering only HEIs that have a certain type of TNE, despite the low number of responses per region, some interesting trends are worth mentioning.

Joint Universities have increased in importance at the majority of HEIs in Europe, Latin America & the Caribbean and North Africa & the Middle East, but not in the other regions. In Europe and Latin America & the Caribbean this is also the type of TNE that increased in importance at the highest percentage of HEIs (67% and 60% respectively).

Franchise Programs have increased in importance at the majority of HEIs in Asia & Pacific and in North Africa & the Middle East, where they are the type of TNE that increased in importance at the highest percentage of HEIs (75% and 82% respectively).

International Branch Campus have increased in importance at the majority of HEIs only in Latin America & the Caribbean (at 67% of HEIs).

Finally, Articulation Programs have increased in importance at the majority of HEIs in Europe, North Africa & the Middle East and Asia & Pacific, while in North America at half of HEIs, where they are the activity that has increased in importance at the highest percentage of HEIs together with Franchise Programs.

In Sub-Saharan Africa none of the types of TNE has increased in importance at the majority of HEIs but International Branch Campus and Articulation Programs have increased in importance at the highest percentage of HEIs (44%).

The question on TNE was not the same as in the 4<sup>th</sup> and 5<sup>th</sup> Global Surveys, making any comparison impossible.

## The role of COVID-19 on the changes in different TNE types

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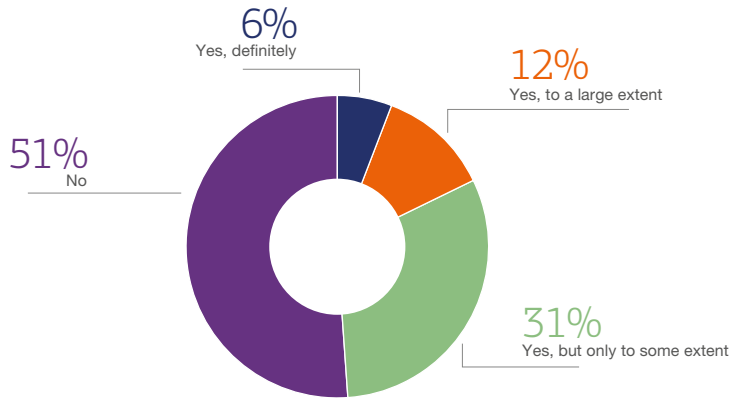
Within the domain of TNE, the profound impact of the COVID-19 crisis resonates on a global scale, mirroring the trends seen in changes to international partnerships.

Globally, slightly more than half of respondents (51%) noted that these shifts in TNE were not primarily attributed to the crisis. In contrast, 31% believed that the crisis had influenced changes to some extent. Significantly, 12% perceived a substantial level of influence arising from the crisis, while a smaller 6% maintained that the changes were unquestionably a direct outcome of the crisis (Figure 68).

Considering these findings and the relatively low TNE involvement across HEIs worldwide, standing at just 27%, it becomes apparent that the COVID-19 pandemic has indeed exerted an influence on the changes in the different TNE types. However, when looking at the similar (or even slightly higher) percentages in global institutional involvement in TNE from the 5<sup>th</sup> Global Survey in 2018 before the pandemic, it becomes challenging to definitively attribute the major impact solely to the COVID-19 crisis. It is plausible that the crisis might have impeded TNE growth or, alternatively, that other factors were simultaneously at play. Regardless, these results underscore the complex interplay between significant global events like the pandemic and the trajectory of TNE involvement.

**Figure 68**

Do you think that these changes are mainly a result of the COVID-19 crisis?



### Regional and private vs. public analysis

Private HEIs have been more affected by COVID-19 than public HEIs when it comes to TNE, with 59% of private HEIs reporting an effect of COVID-19 compared to 43% of public HEIs. Moreover, 10% of private HEIs reported that changes in TNE were due to COVID-19 compared to only 3% of public HEIs.

Regional perspectives offer valuable insights into the influence of the COVID-19 crisis on TNE involvement.

Notably, North Africa & the Middle East emerged as the region most strongly affected, with 80% of participants acknowledging the influence of the COVID-19 crisis on TNE. Among these, a substantial 60% noted a moderate crisis-driven influence, 12% emphasised a notable impact, and 8% acknowledged a certain crisis-driven influence.

Latin America & the Caribbean showcased a noteworthy trend, with 69% of HEIs reporting an impact on TNE due to the COVID-19 crisis. Among these respondents, 27% recognized a significant crisis-driven impact, 32% noted a moderate influence, and 12% were certain of the crisis's definitive impact.

Also, in the Asia & Pacific region, a majority of respondents (53%) recognized the impact on TNE. Among them, 29% acknowledged a moderate extent of influence, 14% perceived a significant crisis-driven influence, and 10% firmly attributed the changes to the crisis.

In contrast, across Europe, a substantial percentage of HEIs (64%) believed that the observed changes in TNE were not primarily driven by the COVID-19 crisis. Conversely, 29% considered the crisis had influenced these changes to some extent. A smaller 4% indicated a notable crisis-driven influence, while only 3% were certain of the crisis as a definite consequence.

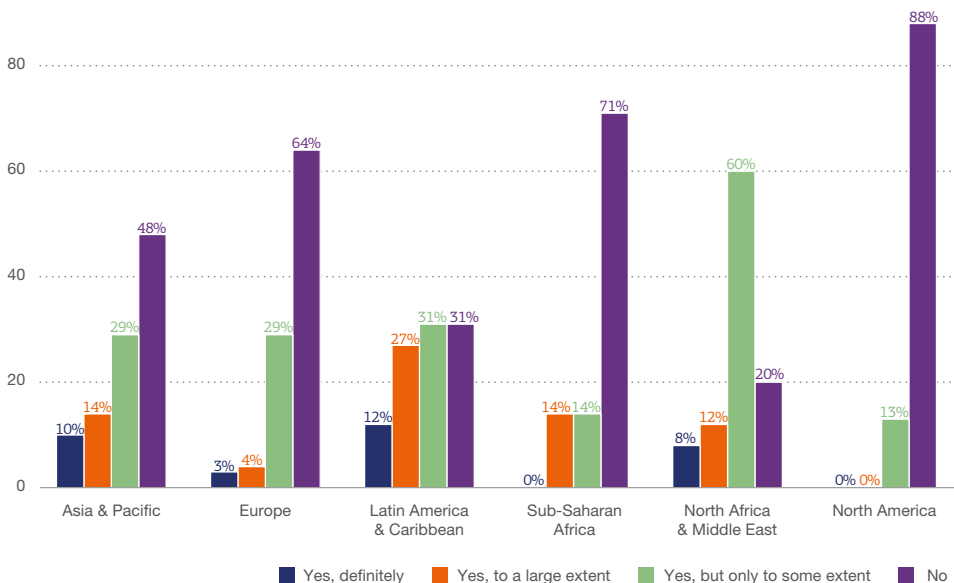
HEIs in Sub-Saharan Africa portrayed a distinct perspective, with a majority (71%) indicating that the COVID-19 crisis had no significant impact on TNE. Among the minority who responded otherwise, 14% perceived a moderate influence, while another 14% observed a notable crisis-driven influence.

Finally, in North America, a significant 88% of respondents expressed that changes in TNE were not primarily a result of the COVID-19 crisis. Only 13% indicated the crisis had influenced these changes to some extent. Among the respondents, none of them perceived a definite or a significant extent of influence from the crisis.

In summary, the influence of the COVID-19 crisis on TNE exhibits strong regional variations. Notably, North Africa & the Middle East and Latin America & the Caribbean have emerged as the regions most impacted by the crisis. Conversely, North America stands out as the region with the least impact, intriguingly followed by Sub-Saharan Africa, and subsequently Europe. As illustrated in Figure 69, it remains essential to acknowledge the substantial variability in respondent numbers across these regions. In some regions, the number of replies is very low (Figure 69).

**Figure 69**

Do you think that these changes are mainly a result of the COVID-19 crisis? (Regional results)



Exploring institutional involvement in TNE across regions amidst varying COVID-19 impacts is intriguing. Yet, drawing clear conclusions about the crisis's influence is challenging. Notably, despite the crisis's pronounced impact on TNE involvement in Latin America & the Caribbean, this region exhibits the lowest institutional involvement at 22%. In contrast, North Africa & the Middle East, which experienced a significant crisis impact, boasts one of the highest institutional involvement in TNE at 36%, second only to North America 37%—the region with the lowest crisis impact. These findings underscore the necessity for nuanced interpretation, recognizing the multifaceted interplay of factors beyond the COVID-19 crisis.

Lastly, drawing definitive conclusions on the impact of the crisis on changes in the importance of different TNE types over the past five years is not feasible due to the limited number of responses per region.

## Virtual internationalization

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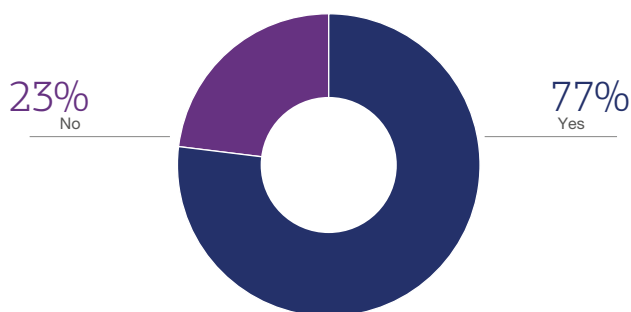
Virtual internationalization has become crucial for institutions seeking to enhance global engagement and educational opportunities. Virtual tools enable cross-border collaboration, knowledge exchange, and learning experiences without the limitations of geography. This section presents the realm of virtual internationalization, exploring institutions' engagement with such opportunities, both globally and regionally.

At the global level, the resonance of virtual internationalization becomes evident. A substantial majority (77%) of respondents affirm their institutions' engagement with virtual internationalization opportunities, while a minority (23%) indicate non-participation (Figure 70).

**Figure 70**

Does your institution engage in virtual internationalization opportunities?

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This widespread engagement highlights the growing recognition of the potential that virtual opportunities hold in enhancing global interactions and educational offerings.

### Regional and private vs. public analysis

There is not a great difference between private and public HEIs vis à vis engagement in virtual internationalization, with both types of HEIs reporting high levels of engagement, and only a slightly higher percentage of private HEIs reporting engagement compared to public ones (79% vs. 76%).

At the regional level, the impact of virtual internationalization takes on varying dimensions. Latin America & the Caribbean emerges as the frontrunner, with an impressive 91% of institutions engaging in virtual internationalization opportunities.

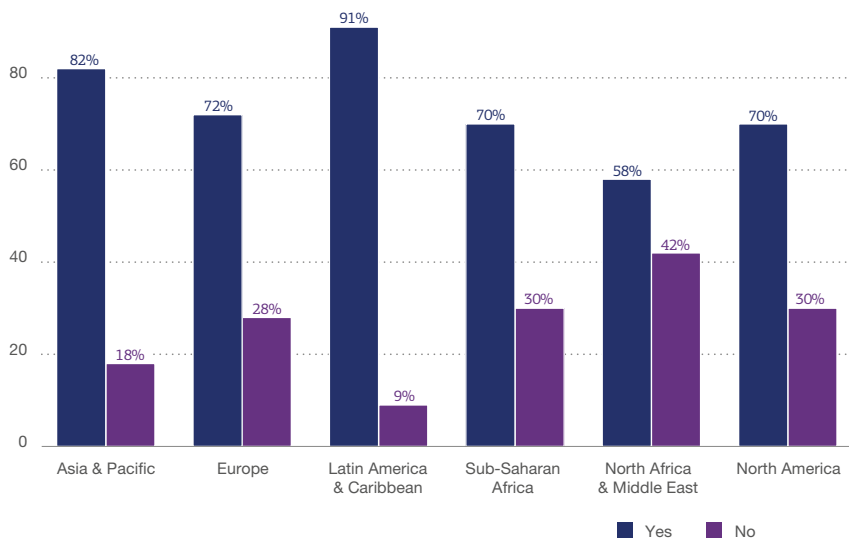
Asia & Pacific closely follows, with 82% of institutions participating in virtual internationalization, reflecting the region's proactive adoption of technological advancements.

On the other hand, North Africa & the Middle East demonstrate the lowest engagement, with over half of respondents (58%) participating in virtual internationalization opportunities.

Lastly, as Figure 71 shows: Europe, Sub-Saharan Africa, and North America maintain relatively balanced engagement levels, hovering around 70% (Figure 71).

**Figure 71**

Does your institution engage in virtual internationalization opportunities? (Regional results)



Overall, the diverse pattern of engagement in virtual internationalization opportunities underscores the complex interplay of regional contexts, institutional strategies, and technological readiness.

It is interesting to observe the alignment between the emphasis placed on virtual internationalization opportunities by Latin America & the Caribbean as an activity for internationalization in a preceding section of the survey and the region's robust involvement in virtual internationalization. This correlation underscores the consistency between strategic priorities and practical implementation within this region. However, drawing consistencies across the other regions presents a more intricate challenge. Despite allocating a relatively low priority to virtual internationalization opportunities in internationalization strategies, a distinct divergence emerges: nearly all regions, except for North Africa & the Middle East, reported substantial engagement in virtual internationalization at their respective institutions.

This paradox underscores the complicated interaction between institutional strategic priorities and pragmatic implementation. It also invites further investigation into the underlying motivations and contextual factors that drive institutional involvement in virtual internationalization within one region.

## Change in importance of virtual internationalization opportunities over the past five years

Respondents who affirmed their institutions' involvement in virtual internationalization opportunities were asked about the shifting significance of different types of these opportunities over the preceding five years.

The first thing to note is that the majority of all HEIs that replied to the survey offer virtual exchanges (69%), COIL (60%) and online preparatory courses (56%), but not MOOCs (46%) and

online degree programmes offered by the institution to students in other countries (45%). The most common activity is virtual exchanges and the least common online degree programmes offered by the institution to students in other countries. Considering only HEIs that do offer a certain virtual internationalization opportunity, interesting trends emerge.

The overall majority (80%) indicated that the importance of virtual exchanges has increased over the past five years, making virtual exchanges the activity that increased in importance at most HEIs. Only a marginal 16% stated that its importance has remained unchanged, while a mere 3% believed it has decreased.

Collaborative Online International Learning (COIL) follows closely with 76% of respondents reporting an increase in its importance over the past five years; 22% reported that its importance has stayed the same, while only 2% indicated a decrease.

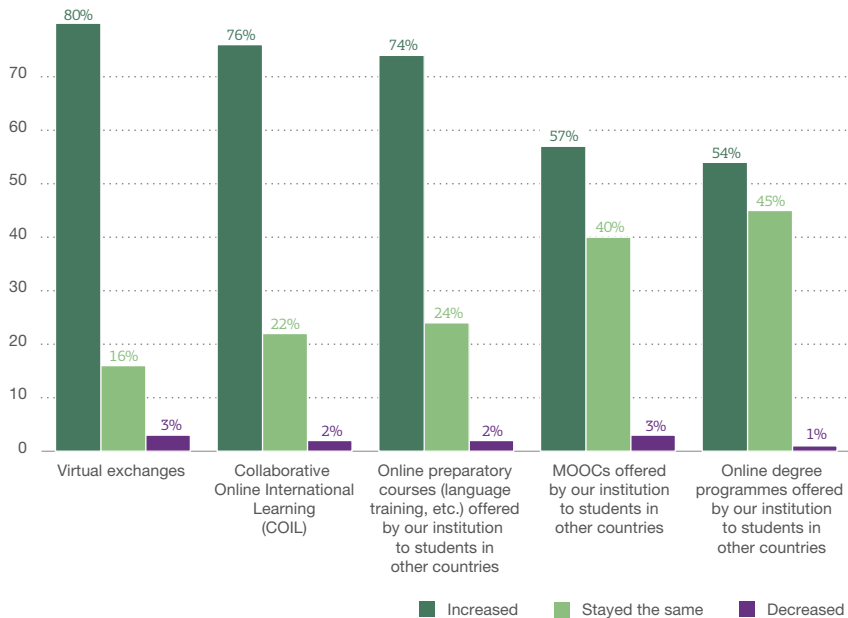
The situation is similar for online preparatory courses offered to students in other countries. Three-quarters of HEIs (74%) reported an increase in importance over the past five years, while 24% noted that the importance of these courses remained steady and only 2% observed a decrease in importance.

The last two activities also increased in importance at the majority of HEIs but at smaller percentages.

Fifty-seven percent of respondents indicated that the significance of Massive Open Online Courses (MOOCs) offered to students in other countries increased over the past five years, while a substantial percentage (40%) felt that its importance had remained unchanged, and only 2% observed a decrease in importance.

**Figure 72**

Change in importance of virtual internationalization opportunities over the last five years



Similar to MOOCs, Online Degree Programs offered to students in other countries increased in importance at 54% of HEIs, while 45% reported that the importance had stayed the same, and just 1% of respondents witnessed a decrease in importance (Figure 72).

In summary, these results offer valuable insights into the changing importance of various virtual internationalization opportunities, among which, virtual exchanges and COIL stand out not only for being the most common activities, but also those that have increased in importance at the highest percentages of HEIs. On the other hand, Online Degree Programs and MOOCs are less common and experienced comparatively lesser increases, but still increased in importance at the majority of HEIs. These findings underscore the dynamic nature of virtual internationalization strategies, reflecting institutions' ongoing efforts to adapt to the evolving needs of an interconnected world.

### Regional and private vs. public analysis

In terms of engaging in specific virtual internationalization opportunities there are no major differences between private and public HEIs. The only noteworthy differences are that more private HEIs offer online degree programmes to students in other countries (53% vs. 40%) and Collaborative Online International Learning (COIL) (65% vs. 57%).

In terms of change in importance, the trends are similar for both private and public with all virtual internationalization opportunities having increased in importance at the majority of HEIs. but interestingly enough, the activity that increased in importance at the highest percentage of private HEIs are online preparatory courses (language training, etc.) offered by the institution to students in other countries (at 77% of HEIs), while at public HEIs it is virtual exchanges (at 83% of HEIs). Nonetheless, the differences are small as both activities increased in importance at more than 70% of HEIs, both public and private.

Conducting a comprehensive regional analysis is challenging due to significant variations in replies across the regions and due to the different levels of engagement in virtual internationalization in regions, as seen above.

In all regions the majority of all HEIs that replied to the survey engage in virtual exchanges, and in all regions except Sub-Saharan Africa the same applies for online preparatory courses (language training, etc.) offered by the institution to students in other countries. Collaborative Online International Learning (COIL) is also present at the majority of HEIs in Asia & Pacific and Latin America & the Caribbean and at around half in all other regions. At the other end, only 26% of HEIs in Sub-Saharan Africa offer online degree programmes to students in other countries and the same percentage of HEIs in North America offer MOOCs.

Virtual exchanges are the most common activity in all regions, going from 53% of HEIs in North America to 84% of HEIs in Latin America & the Caribbean.

It is interesting to note that the results for engagement in virtual exchanges in Europe is somewhat higher than what was reported in the EUA trends survey (63% vs. 54%).

The least common activity varies across the regions, with online degree programmes offered by the institution to students in other countries being the least common in North Africa & the Middle East (42% of HEIs), Asia & Pacific (48%), Europe (40%) and Sub-Saharan Africa (26%) while MOOCs are the least common in Latin America & the Caribbean (54%) and North America (26%).

In Europe, 44% of HEIs that replied to the survey offer MOOCs. This result is in line with that of the EUA Trends, in which 45% of European HEIs replied that they offer MOOCs (Table 31).

**Table 31**

Engagement in different virtual internationalization activities	Asia & Pacific	Europe	Latin America & the Caribbean	North America	North Africa & the Middle East	Sub-Saharan Africa
Online preparatory courses (language training, etc.) offered by our institution to students in other countries	60%	54%	64%	53%	51%	40%
MOOCs offered by our institution to students in other countries	55%	44%	54%	26%	45%	30%
Online degree programmes offered by our institution to students in other countries	48%	40%	54%	47%	42%	26%
Collaborative Online International Learning (COIL)	68%	50%	77%	51%	49%	49%
Virtual exchanges	79%	63%	84%	53%	57%	60%

Considering only HEIs that offer a specific type of virtual internationalization opportunity, the regional analysis provides for interesting differences among regions and activities.

Online preparatory courses (language training, etc.) offered by the institution to students in other countries, Collaborative Online International Learning (COIL) and virtual exchanges have increased in importance at the majority of HEIs in all regions.

Virtual exchange is the activity that increased in importance at the highest percentage of HEIs in Europe (80%), Latin America & the Caribbean (85%) Sub-Saharan Africa (69%) and North Africa & the Middle East (79%).

Online preparatory courses (language training, etc.) offered by the institution to students in other countries is the activity that increases in importance at the highest percentage of HEIs in Asia & Pacific (78%) and Collaborative Online International Learning (COIL) is the activity that increases in importance at the highest percentage of HEIs in North America (82%).

MOOCs offered by the institution to students in other countries remained stable at the majority of HEIs in Sub-Saharan Africa and Asia & Pacific while increasing in all other regions. Online degree programmes offered by the institution to students in other countries remained stable at the majority of HEIs in Asia & Pacific while increasing in importance in all other regions.

As stated before, in all regions but Sub-Saharan Africa and Asia & Pacific all activities have increased in importance at the majority of HEIs. These results show the increased importance of virtual internationalization in all regions of the world.

As was the case for engagement in virtual internationalization opportunities, the change in importance of virtual internationalization opportunities does not automatically reflect the level of priority of virtual internationalization opportunities in internationalization strategies. For instance, the highest percentage of HEIs reporting virtual internationalization as a priority in internationalization strategies is to be found in Latin America & the Caribbean, but it is only 37%, while in Europe and North America, it is as low as 7%. However, the importance of virtual internationalization opportunities increased in all these regions and no substantial difference can be noted between them, for certain opportunities the importance even increased at a higher percentage of HEIs in Europe or North America than in Latin America & the Caribbean.



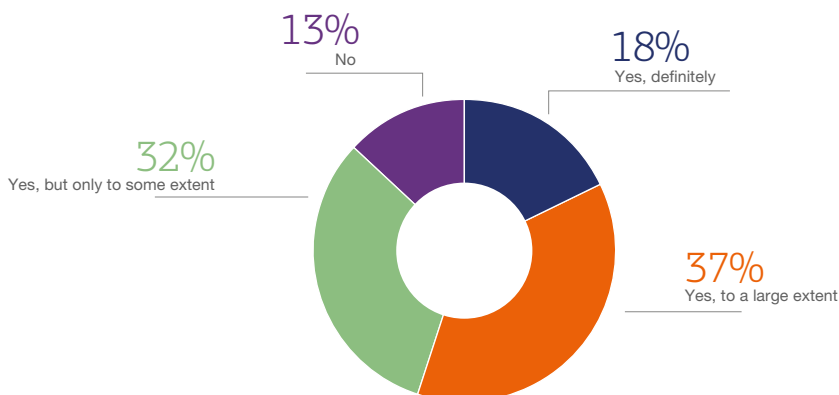
These results underline, once again, the nuanced interplay between regional priorities and the practical implementation of operational practices within the broader context of global engagement strategies for internationalization.

## The role of COVID-19 on changes in the importance of virtual internationalization opportunities

As Figure 73 shows, a substantial majority of participants (87%) indicated that changes in the importance of virtual internationalization opportunities and COVID-19 are related to varying degrees: 18% stated that the changes were due to COVID-19, 37% believed they were due to COVID-19 to a large extent, and 32% recognized that the changes were due to COVID-19 but only to some extent. Only 13% of HEIs replied that the changes were not due to COVID-19 (Figure 73).

**Figure 73**

Were the changes in importance in virtual internationalization opportunities due to COVID-19?



### Regional and private vs. public analysis

There are no major differences between private and public HEIs, both of which report that changes in the importance of virtual internationalization opportunities and COVID-19 are related (88% of public and 86% of private HEIs). Only a slightly higher percentage of private HEIs (23%) reported that changes in importance were due to COVID-19 than public HEIs (15%), but the difference is not substantial.

A comprehensive regional analysis reveals intriguing patterns regarding the perceived influence of the COVID-19 crisis on the shifts observed in virtual internationalization opportunities.

In all regions, the majority of HEIs reported that changes in the importance of virtual internationalization opportunities and COVID-19 are related to one degree or another.

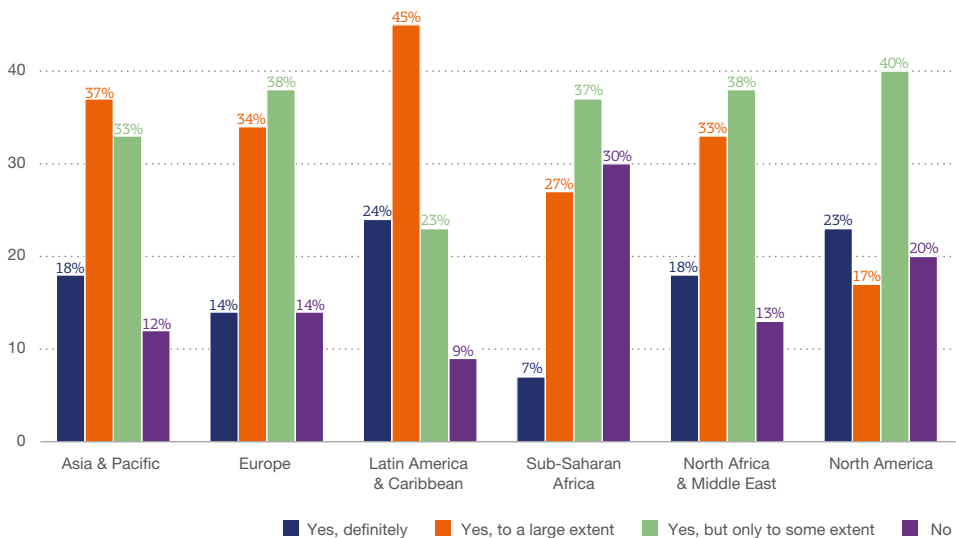
Sub-Saharan Africa and North America emerge as the regions where the changes in the importance of virtual internationalization opportunities and COVID-19 are linked the least, with 30% and 20% respectively of respondents stating that changes were not due to COVID-19.

However, there is an interesting difference between these two regions, while Sub-Saharan Africa is also the region with the lowest percentage of HEIs reporting that changes in importance were due to COVID-19 (only 7%), this percentage is 23% in North America, second only to Latin America & the Caribbean, which is the region with the highest percentage of HEIs reporting a link of causality between COVID-19 and changes in importance of virtual internationalization opportunities, with 24% of HEIs indicating that changes were due to COVID-19, as many as 45% reporting that changes were due to COVID-19 to a large extent and only 9% indicating that changes were not due to COVID-19.

The other regions present trends that are half way between these extremes. In general, the majority of HEIs in all regions reported a causal link between COVID-19 and changes in the importance of virtual internationalization opportunities, either to a large or to some extent (Figure 74).

**Figure 74**

Were the changes in importance in virtual internationalization opportunities due to COVID-19? (Regional results)



Overall, these diverse regional perspectives offer valuable insights into the nuanced dynamics between the COVID-19 crisis and changes in virtual internationalization opportunities. It is evident that the crisis's influence varies across regions, reflecting the complex interplay of contextual factors, institutional strategies, and global circumstances.

D

**INTERNATIONALIZATION  
OF TEACHING  
AND LEARNING:  
INTERNATIONALIZATION  
OF THE CURRICULUM  
AT HOME**

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## Part D.

# INTERNATIONALIZATION OF TEACHING AND LEARNING: INTERNATIONALIZATION OF THE CURRICULUM AT HOME

The present part is the second investigating internationalization of teaching and learning and it focuses on internationalization of the curriculum at home.

Internationalization of the curriculum and internationalization at home are two concepts that were born separately. According to Leask's definition, internationalization of the curriculum is a term referring to:

“the incorporation of international, intercultural and global dimensions into the content of the curriculum as well as the learning outcomes, assessment tasks, teaching methods and support services of a program of study” (Leask, 2015)

Internationalization at home has been defined in different ways, but the most recent definition is:

“internationalization at home is the purposeful integration of international and intercultural dimensions into the formal and informal curriculum for all students within domestic learning environments.” (Beelen and Jones, 2015, p.76)

This makes the concept very similar to that of internationalization of the curriculum in such a way that the two concepts can now be used almost interchangeably.

For this reason, in this survey, we considered the two concepts as one and the same and we investigated internationalization of the curriculum at home, which is a very important area of internationalization as it can impact 98% of students who do not experience mobility. The main results are reported below.

## Main results part D

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### *Change in importance of internationalization of the curriculum at home over the past five years*

- 75% of respondents acknowledged a noticeable increase in the importance of internationalizing the curriculum at home within their institution over the past five years.
- Across all regions, a predominant majority of respondents indicated an increase in the importance of internationalizing the curriculum at home with a noticeable emphasis on somewhat increased significance.

### *Change in importance of ways to internationalize curriculum over the last five years*

- “Online activities that develop international perspectives of students at home” which encompassed practices such as virtual exchanges, COIL, online collaborative international projects, and virtual international internships, is the activity that increased in importance at most HEIs in all regions of the world.
- There are some interesting regional differences - while in North America the focus is mainly on “Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL, online collaborative international projects; virtual international internships, etc.)”, in all other regions there is a broader spectrum of activities that HEIs consider tools for internationalization of the curriculum at home.

### *Institution-wide international, intercultural or global learning outcomes or graduate capabilities*

- Slightly over half of respondents (51%) reported having defined international, intercultural or global learning outcomes or graduate capabilities.
- International, intercultural or global learning outcomes or graduate capabilities are more common at private HEIs (61%) than at public ones (44%) and the approach taken by private and public HEIs is different, more centralised at the institutional level for private HEIs and more devolved to faculty level for public ones.
- The regional analysis underscores the diverse approaches and priorities that institutions adopt in integrating international, intercultural or global competencies into their graduates’ learning experiences. Asia & Pacific and North Africa & the Middle East come out as the most advanced regions in terms of defining learning outcomes, but with different approaches, at the institutional or national levels. On the contrary, North America is the region with the least development of such learning outcomes.
- The results of the 6<sup>th</sup> Global Survey indicate progress with respect to the definition of learning outcomes related to international, intercultural or global competencies of graduates, as the percentage of HEIs having defined them grew to 51% from 38% at the times of the 5<sup>th</sup> Global Survey.

### *Change in importance of extra-curricular activities over the last five years*

- “Interaction with students in other countries using virtual internationalization”, “Events that provide inter-cultural/international experiences on campus or in the local community” and “Intercultural skills-building workshops for staff and students” are the activities that have increased in importance over the last five years at the majority of HEIs in all regions of the world.

## **Change in importance of internationalization of the curriculum at home over the past five years**

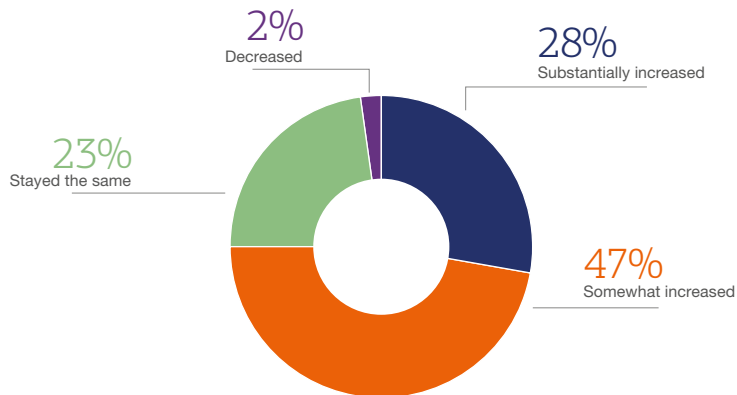
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This section presents the evolving significance of internationalization of the curriculum at home, excluding staff and student mobility. Respondents were asked about their perceptions of how the importance of internationalizing their institution’s curriculum at home has changed over the past five years.

Globally, a substantial 75% of respondents acknowledged a noticeable increase in the importance of internationalizing the curriculum at home within their institutions. Among these respondents, a significant 47% noted somewhat increased importance and 28% noted that importance substantially increased. Conversely, a smaller yet noteworthy proportion (23%) reported that the level of importance has remained consistent over the years. Lastly, a mere 2% of respondents perceived a decline in the importance of internationalization of the curriculum at home (Figure 75).

**Figure 75**

Change in importance of internationalization of the curriculum at home over the last five years



### Regional and private vs. public analysis

Results for private and public HEIs are similar, but the percentage of HEIs for which the importance of internationalization of the curriculum at home has substantially increased is higher for private than for public HEIs (34% vs. 24%).

At the regional level, across all regions, a predominant majority of respondents indicated an increase in the importance of internationalizing the curriculum at home.

Notably, as Figure 76 illustrates, Asia & Pacific stands out as the region with the highest percentage of respondents (79%) indicating an increase in the importance of curricular internationalization at home, of which, a substantial 60% indicated a somewhat increase. Similarly, Europe recorded a significant 78% of respondents noting a similar increase, with 50% reporting a somewhat increased importance. In both regions, the proportions of respondents who felt importance had remained unchanged was again very similar with 18% in Asia & Pacific and 20% in Europe, as well as the replies indicating a decrease (3% and 1% respectively).

In the Latin America & the Caribbean region, 72% of respondents highlighted an increase in the importance of internationalizing their curriculum at home. Among these, 42% emphasised a somewhat increased significance. Over a quarter (27%) indicated that its importance remained constant, and only 2% reported a decrease.

Interestingly, a distinct pattern emerges in the North Africa & the Middle East region. Although, once again, the vast majority (71%) of respondents from these regions indicated an increase in the importance of the internationalization of the curriculum at home. Strikingly, both substantial increase and somewhat increase garnered almost identical percentages of 35% and 36%, respectively, making these regions the ones with the highest percentage of HEIs reporting

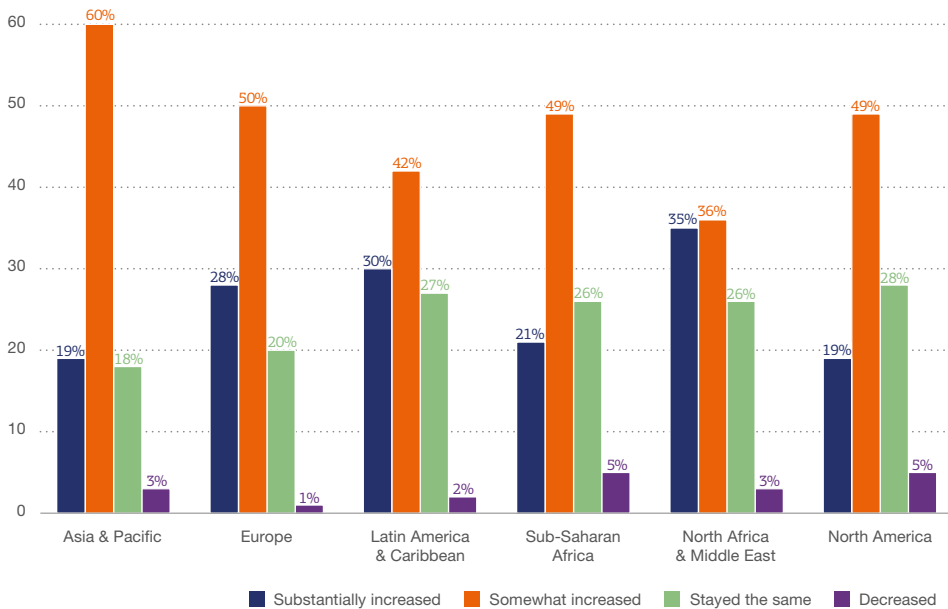
a substantial increase. In contrast, around a quarter (26%) mentioned that importance had remained steady, and merely 3% reported a decrease.

Both in Sub-Saharan Africa and North America, a substantial majority of respondents (70% and 68% respectively) highlighted an increase in the importance of curriculum internationalization. Among these respondents, 49% in each region identified a somewhat increased significance. Additionally, over a quarter (26% and 28% respectively) of respondents perceived the importance as unchanged, with only a minor proportion of 5% in both regions indicating a decrease.

Overall, the resonance of increased importance regarding internationalization of the curriculum at home is evident, both at the global and regional levels. This trend is particularly evident in the lower percentage of respondents reporting a decrease, and the substantial number indicating a somewhat increased significance. This widespread trend showcases a robust global and regional drive towards integrating international perspectives into home curriculum (Figure 76).

**Figure 76**

Change in importance of internationalization of the curriculum at home over the last five years by region



A comparison with previous survey editions is not feasible as this particular question was modified for the 6<sup>th</sup> edition; previously we asked only for the importance of internationalization of the curriculum at home but not how it changed over the last five years.

## Change in the importance of ways to internationalize curriculum over the last five years

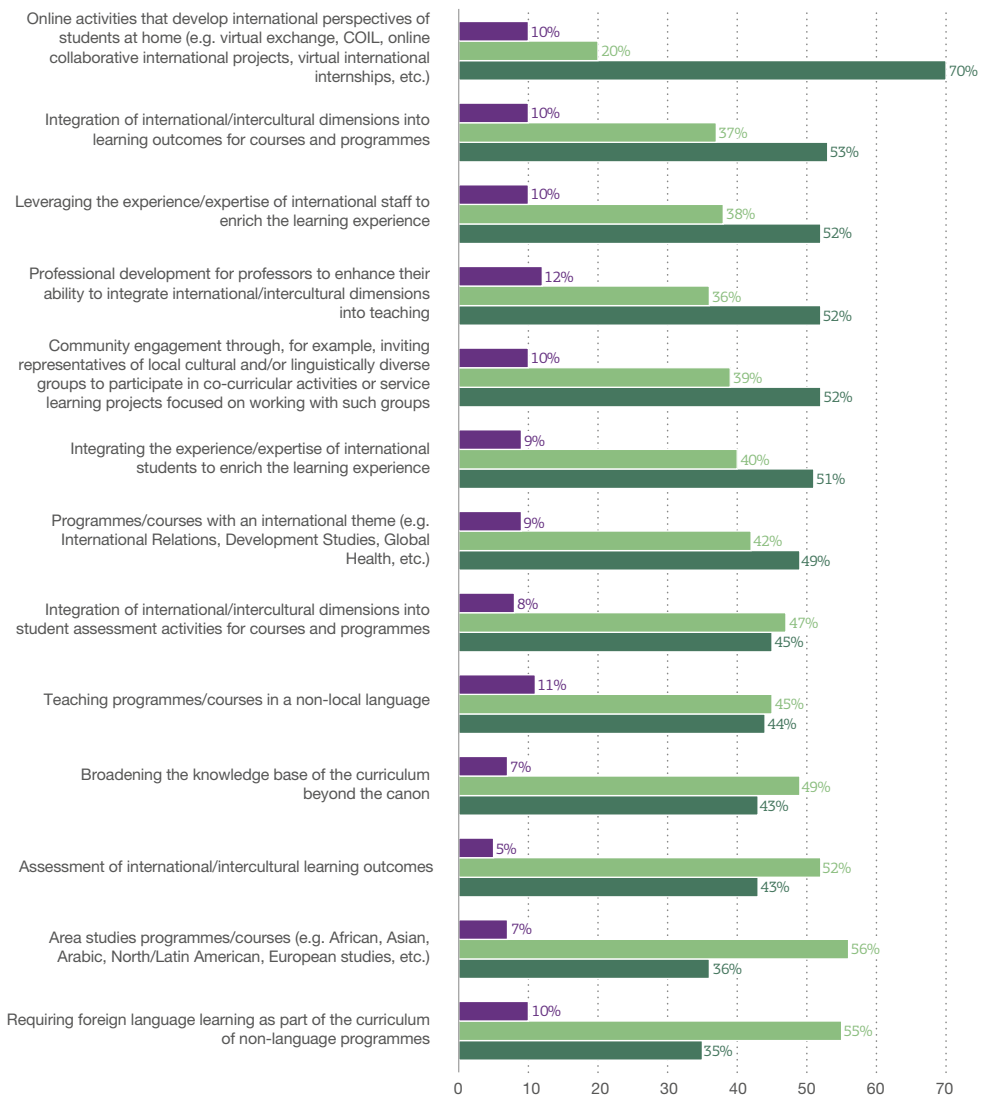
This section explores the changing significance of various approaches to internationalizing the curriculum. Participants were asked to assess the evolving importance over the past five years of several approaches to internationalizing the curriculum at their respective institutions. For each

approach, participants had to state whether importance over the past five years had increased, remained the same or decreased.

The first thing to report is that all approaches are common to all respondents, with the most common five being present at 88% of HEIs and the least common (Area studies programmes/courses (e.g. African, Asian, Arabic, North/Latin American, European studies, etc.)) being present at 61% of HEIs (Figure 77).

**Figure 77**

Change in importance of ways to internationalize curriculum over the last five years



Considering only HEIs that offer a particular activity, as Figure 77 shows, among the list of options provided, “Online activities that develop international perspectives of students at home” which encompasses practices such as virtual exchanges, COIL, online collaborative international



projects, and virtual international internships, experienced the most substantial increase in importance, with 70% of respondents indicating growth in this area.

Several other approaches garnered relatively similar percentages of increased importance, all around 50%: “Integration of international/intercultural dimensions into learning outcomes for courses and programs”, “Leveraging the experience/expertise of international staff to enrich the learning experience,” “Professional development for professors to enhance their ability to integrate international/intercultural dimensions into teaching,” “Community engagement through activities like inviting representatives of local cultural and/or linguistically diverse groups to participate in co-curricular activities or service learning projects focused on working with such groups” and “Integrating the experience/expertise of international students to enrich the learning experience”.

“Programs/courses with an international theme (e.g. International Relations, Development Studies, Global Health, etc.)” is the last activity for which the biggest group of HEIs reported an increase in importance (49%).

For other possible ways of internationalizing the curriculum, the percentage of respondents who indicated that importance remained unchanged is the highest. For “Integration of international/intercultural dimensions into student assessment activities for courses and programs” and “Teaching programs/courses in a non-local language” we see almost the same percentage of HEIs indicating an increase and no change (47% vs. 45% and 45% vs. 44%).

For all other activities the difference between the percentage of HEIs reporting stability and those reporting an increase is higher, almost half of HEIs reported stability for “Broadening the knowledge base of the curriculum beyond the canon”, while the majority reported stability for the remaining three activities: “Requiring foreign language learning as part of the curriculum of non-language programs”, “Assessment of international/intercultural learning outcomes”, and “Area studies programs/courses (e.g. African, Asian, Arabic, North/Latin American, European studies, etc.)”, which is mentioned before, is also the least common activity.

Lastly, across all possible activities, the percentages of respondents indicating a decrease in importance over the past five years are relatively low, between 5% and 12%.

Overall, the assessment of changing priorities in curriculum internationalization reveals intriguing patterns across diverse strategies.

It is interesting to compare these results with the overarching priority of internationalization activities. While online activities fostering global perspectives at home exhibit the highest surge in importance for curriculum internationalization, virtual internationalization opportunities for students (e.g. virtual exchanges and COIL) are not considered a priority in the broader internationalization landscape. This might suggest that virtual internationalization is seen by HEIs as a tool that is specifically useful for internationalizing the curriculum at home.

## Regional and private vs. public analysis

The main difference between private and public HEIs is that a wider range of activities have increased in importance at private HEIs than at public ones. Eight activities are considered to have increased in importance at more than 50% of private HEIs, while at public ones, only four of them. These four activities are also among those having increased in importance at private HEIs, and both types of HEIs clearly identify “Online activities that develop international perspectives of students at home” as having increased in importance at the highest percentage of HEIs.

At regional level, all activities are offered at the majority of HEIs in all regions. The least common one being “Area studies programmes/courses (e.g. African, Asian, Arabic, North/Latin American, European studies, etc.)” in Asia & Pacific, Europe, Latin America & the Caribbean and North Africa & the Middle East with percentages of HEIs offering this ranging from 56% (in Asia & Pacific) to 70% (in North Africa & the Middle East). “Assessment of international/intercultural learning outcomes” is the least common in Sub-Saharan Africa (at 60% of HEIs) and “Teaching programmes/courses in a non-local language” is the least common in North America (65%).

In terms of most common activities, all HEIs in North America replied that they “Integrate the experience/expertise of international students to enrich the learning experience”, this is also the most common activity in Europe (at 91% of HEIs) and it is common in all regions with the lowest percentage found in Sub-Saharan Africa at 77% of HEIs.

“Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL, online collaborative international projects; virtual international internships, etc.)” is the most common activity in Asia & Pacific (95% of HEIs) and in Latin America & the Caribbean (94%). It is also common in all regions with the lowest percentage, as before, found in Sub-Saharan Africa at 77% of HEIs).

In North Africa & the Middle East and Sub-Saharan Africa the most common activity is “Leveraging the experience/expertise of international staff to enrich the learning experience” (at 88% of HEIs in both regions). This is a common activity in all other regions with the lowest percentage found in Latin America & the Caribbean (85%).

Considering only HEIs that offer a particular activity, in alignment with the global results, the increase in significance of “Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL, online collaborative international projects; virtual international internships, etc.)” emerged across all regions, notably reaching 78% in North America.

In the Americas, this is the only activity for which the majority of HEIs reported an increase. However, while in Latin America & the Caribbean the biggest group of HEIs reported an increase in importance for six other activities, in North America no other activity was reported as increased in importance at the biggest group of HEIs (the percentage of HEIs reporting an increase and stability for “Community engagement through, for example, inviting representatives of local cultural and/or linguistically diverse groups to participate in co-curricular activities or service learning projects focused on working with such groups”, the activity with the second highest percentage of HEIs reporting an increase, is the same, 45%). On the contrary, the majority of HEIs in Asia & Pacific, Europe and North Africa & the Middle East reported an increase in importance for eight activities.

These results show that in these regions there is a broader spectrum of activities that HEIs are considering as tools for internationalization of the curriculum at home, while in North America the focus is mainly on “Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL, online collaborative international projects; virtual international internships, etc.)”.

At regional level, in the Asia & Pacific region, a cluster of activities gained prominence, including “Integration of international/intercultural dimensions into learning outcomes”, with 64% of HEIs reporting an increase, while “Professional development for professors” scored 61%, “Community engagement through local cultural and linguistically diverse groups” stood at 58% and “Programmes/courses with an international theme” and “Integrating the experience/

expertise of international students to enrich the learning experience” were both selected by 55% of HEIs.

In Europe, “Leveraging the experience/expertise of international staff” increased at 59% of HEIs, “Integration of international/intercultural dimensions into learning outcomes” at 58% and “Integrating the experience/expertise of international students” at 57%. Additionally, “Professional development for professors” and “Teaching programmes/courses in a non-local language” each increased in importance at 55% of HEIs.

Similarly, in Sub-Saharan Africa, “Broadening the knowledge base of the curriculum beyond the canon” increased at 58% of HEIs, “Programmes/courses with an international theme (e.g. International Relations, Development Studies, Global Health, etc.)” at 54%, “Professional development for professors to enhance their ability to integrate international/intercultural dimensions into teaching” and Leveraging the experience/expertise of international staff to enrich the learning experience both at 53%.

In North Africa & the Middle East, “Community engagement through, for example, inviting representatives of local cultural and/or linguistically diverse groups to participate in co-curricular activities or service learning projects focused on working with such groups” increased at 66% of HEIs, “Leveraging the experience/expertise of international staff to enrich the learning experience” at 57%, “Professional development for professors to enhance their ability to integrate international/intercultural dimensions into teaching” at 56%, “Assessment of international/intercultural learning outcomes” at 54% and “Integrating the experience/expertise of international students to enrich the learning experience” at 53%.

As mentioned before, in Latin America & the Caribbean, several activities increased in importance at the biggest group of HEIs although not at the majority of them: “Professional development for professors to enhance their ability to integrate international/intercultural dimensions into teaching” increased in importance at 48% and “Integrating the experience/expertise of international students to enrich the learning experience” and “Community engagement through, for example, inviting representatives of local cultural and/or linguistically diverse groups to participate in co-curricular activities or service learning projects focused on working with such groups” at 46%.

Finally, as mentioned above, North America is the sole region where for all activities other than “Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL, online collaborative international projects; virtual international internships, etc.)” the biggest group of HEIs indicated no change in importance over the past five years.

The percentages indicating a decrease in importance for certain activities indicate slight regional variations but remain generally low, below 20% in all regions. The only exception being “Requiring foreign language learning as part of the curriculum of non-language programmes” in North America that decreased at 21% of HEIs.

Overall, these results underline the varying regional dynamics of internationalizing the curriculum at home, reflective of institutional priorities and contexts.

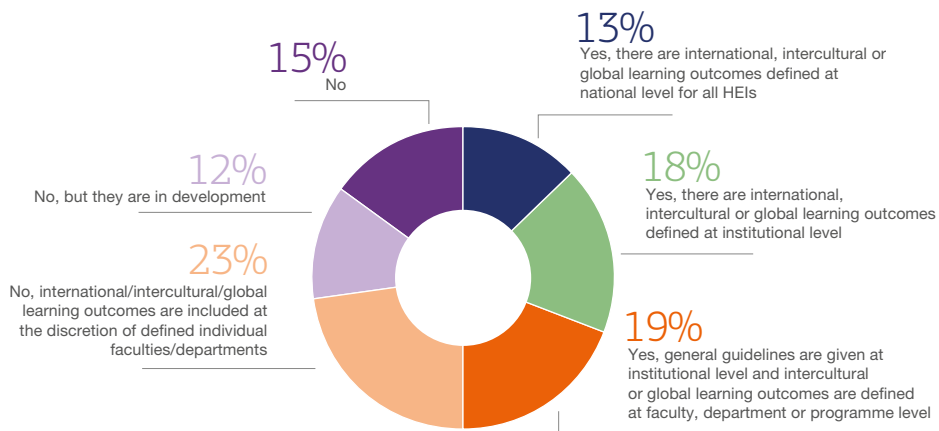
## Institution-wide international, intercultural or global learning outcomes or graduate capabilities

When queried about the presence of Institution-wide international, intercultural or global learning outcomes or graduate capabilities<sup>14</sup>, the responses depict a diverse landscape. Slightly over half of respondents (51%) confirm the existence of such learning outcomes that all graduates must attain in their institutions. Within this subset, a breakdown reveals that 14% of these outcomes are defined at the national level, 18% at the institutional level, and 19% at the faculty, department, or programme level.

Conversely, among the remaining 49% of respondents whose institutions do not maintain such learning outcomes, a spectrum of approaches emerges. Notably, 23% of these respondents indicated that these outcomes are integrated at the discretion of individual faculties or departments. In addition, 12% of institutions are actively in the process of developing these outcomes, and 15% of respondents confirmed that their institutions do not encompass such learning outcomes at all (Figure 78).

**Figure 78**

Does your institution describe a set of international, intercultural or global learning outcomes or graduate capabilities that all graduates must achieve?



### Regional and private vs. public analysis

Private and public HEIs present very interesting differences. First of all, international, intercultural or global learning outcomes or graduate capabilities are defined at 61% of private HEIs compared to only 44% of public HEIs. The percentage of HEIs replying that learning outcomes defined at national level for all HEIs is the same for private and public HEIs but 27% of private HEIs replied that learning outcomes are defined at institutional level compared to only 13% of public HEIs. On the contrary, 27% of public HEIs replied that learning outcomes are included at the discretion of defined individual faculties/departments, while only 15% of private HEIs replied in the same vein.

14. Learning outcomes are the knowledge, skills and abilities that a student is expected to obtain as a result of a particular educational experience. International, intercultural or global learning outcomes encompass different aspects of knowledge, skills, attitudes and values that contribute to international and intercultural understanding, development, and practice (e.g. Demonstrate awareness and respect for commonalities across and difference between different national or cultural identities).

These results show that international, intercultural or global learning outcomes or graduate capabilities are more common at private HEIs, and that the approach taken by private and public HEIs is different, being more centralised at institutional level for private HEIs and devolved to faculty level for public ones.

At the regional level, Asia & Pacific and North Africa & the Middle East stand out with the highest percentages of respondents (around 60%) reporting that their HEIs have defined such learning outcomes for their graduates (Table 32).

In other regions, approximately half of respondents indicated that their institutions had defined such learning outcomes, apart from North America, where only 38% indicated having done so.

Regional specificities become more pronounced when examining the specific levels at which these learning outcomes are defined.

In the Asia & Pacific region, a mere 6% of respondents noted that their institutions have not defined such outcomes at any level, the lowest percentage of all regions. On the contrary, in North America this percentage is as high as 33%.

North Africa & the Middle East present a distinct emphasis on national-level definition, with 28% of respondents highlighting this, the highest percentage of all regions.

On the contrary, national definition of learning outcomes is uncommon in the Americas, with none of the respondents indicating national-level definitions in North America and only 7% in Latin America & the Caribbean. In these two regions there are two important groups: those that define learning outcomes at institutional level (21% in Latin America & the Caribbean and 26% in North America) and those for which learning outcomes are included at the discretion of defined individual faculties/departments (28% in Latin America & the Caribbean and 30% in North America).

Europe and Sub-Saharan Africa present a similar situation, with several groups of HEIs almost equal in size.

**Table 32**

Does your institution describe a set of international, intercultural or global learning outcomes or graduate capabilities that all graduates must achieve?	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Yes, there are international, intercultural or global learning outcomes defined at national level for all HEIs	16%	17%	7%	14%	28%	0%
Yes, there are international, intercultural or global learning outcomes defined at institutional level	26%	12%	21%	16%	17%	26%
Yes, general guidelines are given at the institutional level and intercultural or global learning outcomes are defined at faculty, department or programme level	18%	21%	19%	21%	17%	12%
No, international/intercultural/global learning outcomes are included at the discretion of defined individual faculties/departments	19%	22%	28%	19%	10%	30%
No, but they are in development	15%	9%	14%	16%	16%	0%
No	6%	19%	11%	14%	12%	33%

Overall, these regional variations underscore the diverse approaches and priorities that institutions adopt in integrating international, intercultural or global competencies into their graduates' learning experiences. Asia & Pacific and North Africa & the Middle East come out as the most advanced regions in terms of defining learning outcomes but with different approaches, at institutional or national level. On the contrary, North America is the region where such learning outcomes are least defined (Table 32).

### Comparison with the 4<sup>th</sup> and 5<sup>th</sup> Global Survey results

When analysing the evolution of these institution-wide learning outcomes across previous editions of the survey, intriguing trends emerge.

In the 5<sup>th</sup> Global Survey, the percentage of HEIs with defined institution-wide outcomes decreased to 23% from 35% in the 4<sup>th</sup> Survey. However, it's important to note that the introduction of the option "No, learning outcomes are defined only at some faculties" in the 5<sup>th</sup> edition could have influenced this decrease. If we add the percentage of this option (15%) to the "Yes" responses, the percentage from the 5<sup>th</sup> Global Survey is slightly higher than in the 4<sup>th</sup> (38% vs. 35%).

On the other hand, in the 6<sup>th</sup> Global Survey, a substantial rise to 51% in positive replies is evident. However, once again, this question was further refined in order to garner three levels of responses (national, institutional, and faculty, department, or programme), and eliminating "don't know" and "other" options. While speculation on the reasons behind the fluctuations between the 4<sup>th</sup> and 5<sup>th</sup> Surveys was cautioned against, a more accurate assessment can be made by comparing the 5<sup>th</sup> and 6<sup>th</sup> editions.

Comparing the 5<sup>th</sup> and 6<sup>th</sup> Global Surveys, there is a notable decrease in responses indicating "in development" (31% vs. 12%) and a decline in responses indicating a complete absence of such outcomes (22% vs. 15%). It is interesting that these differences, when added to the total number of replies indicating "yes", come to 49%, a percentage relatively consistent with the current edition. This suggests progress: institutions that previously indicated these learning outcomes were "in development" have now defined their learning outcomes, and a smaller segment of those that previously indicated a lack of learning outcomes in the 5<sup>th</sup> Survey have now joined the ranks of those with defined outcomes in the 6<sup>th</sup> Survey.

Similar trends are also mirrored in the regional results, with Asia & Pacific maintaining the highest percentages of respondents indicating "yes". In contrast, North America continues to be the region with the highest percentages indicating a complete absence of institution-wide outcomes. In the sixth edition, North Africa & the Middle East is one of the regions with the highest percentage of HEIs having defined learning outcomes, and this is consistent with the fact that the Middle East was one with the highest percentages in the 5<sup>th</sup> edition, although the regional breakdown in the two editions of the survey has changed.

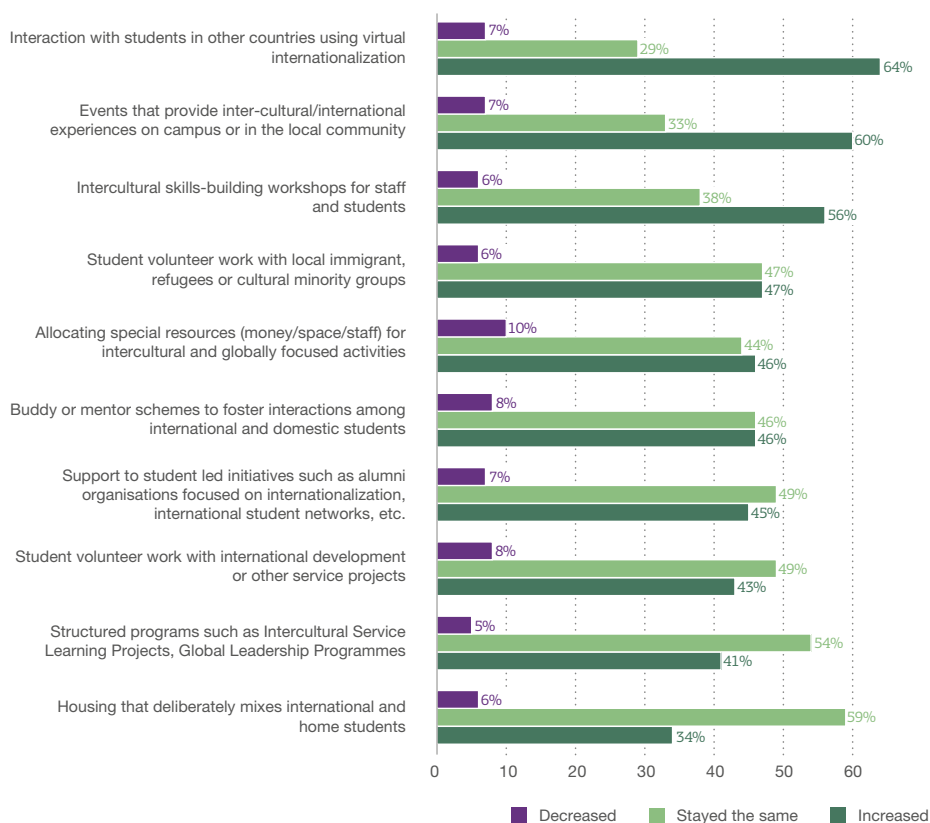
Lastly, Latin America & the Caribbean demonstrates notable growth in the percentage of respondents indicating the presence of learning outcomes, increasing from 16% in the 5<sup>th</sup> Global Survey to 47% in the current edition. This progression underscores the evolving commitment of institutions within the region to enhance international, intercultural, and global learning outcomes.

## Change in importance of extra-curricular activities over the last five years

Extra-curricular activities play a pivotal role in the realm of internationalization at home, offering diverse avenues to infuse students and staff with an international, intercultural, and global perspective. Respondents were asked to indicate the change in importance of a predefined list of activities over the past five years (Figure 79).

**Figure 79**

Change in importance of extra-curricular activities over the last five years



First of all, it is important to mention that all proposed extra-curricular activities are common at HEIs, with “Events that provide inter-cultural/international experiences on campus or in the local community” being the most common (at 93% of HEIs) and “Structured programs such as Intercultural Service-Learning Projects; Global Leadership Programmes” the least common (but still present at 66% of HEIs).

As depicted in Figure 79, several activities have witnessed substantial increases in importance over the past five years, but three stand out at the majority of HEIs: “Interaction with students in other countries using virtual internationalization” is the activity that increased at the highest percentage of HEIs (64%) followed by “Events that provide inter-cultural/international experiences on campus or in the local community” at 60% of HEIs and “Intercultural skills-building workshops for staff and students” at 56%.

Three activities have increased in importance or remained stable at similar percentages of HEIs: “Student volunteer work with local immigrant, refugees or cultural minority groups”, “Allocating special resources (money/space/staff) for intercultural and globally focused activities” and “Buddy or mentor schemes to foster interactions among international and domestic students”.

For the remaining activities the biggest group of HEIs is made up of those reporting no change, for which “Structured programs such as Intercultural Service-Learning Projects; Global Leadership Programmes” and “Housing that deliberately mixes international and home students” also constitute the majority.

Overall, the prevailing trend reflects a positive outlook, as all activities have either grown in importance or remained stable, with the percentage of HEIs reporting a decrease in importance low for all activities, with the biggest decrease being 10% for “Allocating special resources (money/space/staff) for intercultural and globally focused activities”.

### Regional and private vs. public analysis

All activities are common at the majority of both private and public HEIs with “Events that provide inter-cultural/international experiences on campus or in the local community” being the most common for both types of HEIs (at 95% of private and 93% of public HEIs). For private HEIs the least common activity is “Housing that deliberately mixes international and home students” at 61% of HEIs while for public is “Structured programs such as Intercultural Service-Learning Projects; Global Leadership Programmes” at 63%.

For HEIs that do implement an activity, there are no major differences between private and public HEIs with both indicating “Interaction with students in other countries using virtual internationalization”, “Events that provide inter-cultural/international experiences on campus or in the local community” and “Intercultural skills-building workshops for staff and students” as the activities that increased in importance at the majority of HEIs.

At regional level, the first thing to mention is that all activities are present at the majority of HEIs with the least common being “Housing that deliberately mixes international and home students” present at 53% of HEIs in Latin America & the Caribbean. North America is the region where at least 81% of HEIs offer all proposed activities and 100% of HEIs offer “Events that provide inter-cultural/international experiences on campus or in the local community”.

It is interesting to note that in Asia & Pacific all but two activities have increased in importance at the majority of HEIs, whereas in the Americas only three activities have increased in importance at the majority of HEIs.

“Events that provide inter-cultural/international experiences on campus or in the local community” is the activity that increased in importance at the biggest group of HEIs in Asia & Pacific (72% of HEIs), Sub-Saharan Africa (64%) and North America (60%). In all other regions it also increased in importance at the majority of HEIs.

“Interaction with students in other countries using virtual internationalization” is the activity that increased in importance at the biggest group of HEIs in Europe (64% of HEIs), Latin America & the Caribbean (67%) and North Africa & the Middle East (65%). In all other regions it also increased in importance at the majority of HEIs.

“Intercultural skills-building workshops for staff and students” has also increased in importance at the majority of HEIs in all regions.



The percentage of HEIs reporting a decrease in importance of activities is low in all regions. In Europe it is less than 6% for all activities. The highest percentage of HEIs reporting a decrease in importance for an activity is 22% for “Student volunteer work with local immigrant, refugees or cultural minority groups” in Sub-Saharan Africa.

Directly comparing the results of the current survey with the 5<sup>th</sup> Global Survey is not feasible due to differences in question format and the slight modifications in the list of activities. The 5<sup>th</sup> Global Survey asked participants to select the three most important activities, whereas the current survey inquired about the change in importance of predefined activities. Furthermore, the current edition introduced several changes to the list of activities, including the removal of the “other” option and the addition of “Structured programs such as Intercultural Service-Learning Projects; Global Leadership Programmes” and “Support to student-led initiatives such as alumni organisations focused on internationalization, international student networks, etc.”

These differences underline, once again, the need for cautious interpretation when making comparisons across survey editions. However, they do provide us with some valuable insights.

For instance, the activity ranked as the most important globally and across all regions in the 5<sup>th</sup> edition, “Events that provide inter-cultural/international experiences on campus or in the local community”, also demonstrated the highest increase in importance in the current survey, both globally and in many regions. Similarly, “Intercultural skills-building workshops for staff and students”, although not ranked in the top three globally in the 5<sup>th</sup> edition, was ranked as the second or third most important activity across most regions and in the current survey it experienced one of the most substantial increases in importance globally and across all regions.

These observations suggest a level of consistency and highlight the enduring significance of certain extra-curricular activities in fostering internationalization at home.

**E**

**INTERNATIONALIZATION  
OF RESEARCH**

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# Part E.

## INTERNATIONALIZATION OF RESEARCH

The present part investigates internationalization of research, focusing on aspects such as the teaching/research focus of institutions, involvement in international research, main sources of funding for international research and the effect of changes in political relations between countries on internationalization of research. The main results are reported below.

### Main results part E

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#### *Teaching/research-focused institutions*

- The majority of respondents (65%) come from institutions that focus more or less equally on both teaching and research.
- Private HEIs that replied to the survey are more teaching-oriented than public HEIs.
- Despite the fact that the majority of respondents in all regions come from institutions that focus more or less equally on both teaching and research, there are regional differences when it comes to the percentage of predominantly teaching-oriented HEIs with Latin America & the Caribbean being the region with the highest percentage of predominantly teaching-focused institutions (42%) and Sub-Saharan Africa the one with the least (9%).

#### *Involvement in international research*

- There are substantial differences in the approach to internationalization of research depending on the teaching/research focus of HEIs.
- Public HEIs are more involved in international research than private ones.
- HEIs involved in a range of disciplinary and/or multidisciplinary international research; projects and collaborations is the biggest group in all regions except Sub-Saharan Africa.
- In Sub-Saharan Africa more than half of HEIs (56%) have very little international research and it is mainly conducted by individual researchers.
- The current edition of the survey identifies a rise in institutions engaged in a wide spectrum of disciplinary and/or multidisciplinary international research projects and collaborations, with 31% reporting such involvement, compared to 24% in the 5<sup>th</sup> edition.

#### *Main sources of funding for international research*

- The three main sources of funding for international research are: grants from international organisations and foreign funding governmental agencies, grants from national governmental agencies and the institution's own resources.
- The teaching/research focus of HEIs seems to impact mainly on the capacity to obtain grants from national or international agencies, with predominantly research-focused HEIs in a more favourable position than predominantly teaching-focused HEIs, which have to rely more on the use of the institution's own resources.
- Public HEIs have a higher capacity in attracting grants from national and international agencies compared to private HEIs, which are almost obliged to rely on their own resources to conduct international research.

- There are substantial differences between different world regions in terms of the main sources of funding for international research, varying from grants from national governmental agencies in Europe and North America, to institutional own resources in all other regions.
- The comparison with the results of the 5<sup>th</sup> Global Survey suggests that access to grants from international organisations and foreign funding governmental agencies has decreased, especially in Sub-Saharan Africa and as consequence HEIs have to rely more on their own institutional funding to conduct international research.

### *Effect of changes in political relations between countries on internationalization of research*

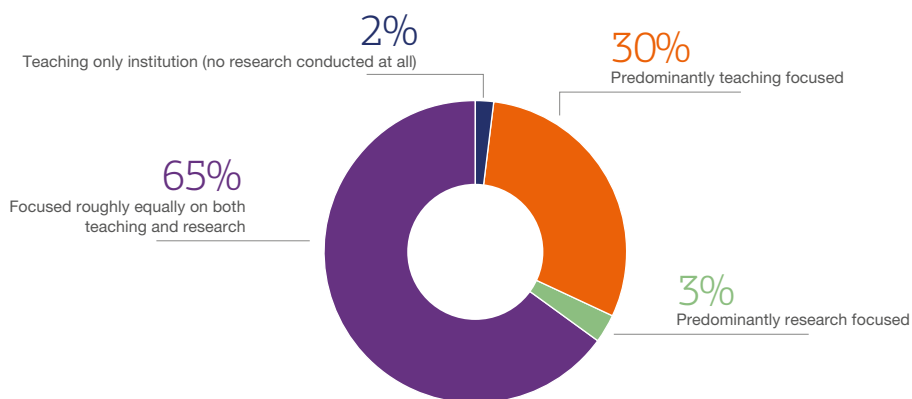
- Only in Europe (58%) and North America (60%) did the majority of HEIs report an effect from changes in political relations between countries on internationalization of research.
- Caution should be used in interpreting the results of this question as the analysis of replies reveals that, unfortunately, there is a level of inconsistency in the way HEIs have replied to the question.

## Teaching/research-focused institutions

Most respondents come from institutions that focus roughly equally on both teaching and research (65%). The remaining are focused predominantly on teaching (30%) and very few are exclusively research-oriented (3%) or teaching only (2%) institutions (Figure 80).

**Figure 80**

Teaching/research focus of HEIs



The question was slightly modified since the 5<sup>th</sup> Global Survey, as a new category called “Teaching only institutions (no research conducted at all)” was introduced and the formulation of the category “Focused on both teaching and research” was changed to “Focused roughly equally on both teaching and research”. This was done to capture more clearly the balance between teaching and research at HEIs.

The introduction of the category “Teaching only institutions (no research conducted at all)” is important as institutions that identified themselves in this category were not asked to reply to

any other question in this section on internationalization of research. The results show that the percentage of “Teaching only institutions (no research conducted at all)” is only 2%.

On the contrary, the change from “Focused on both teaching and research” to “Focused roughly equally on both teaching and research” might have had an important effect; 79% of HEIs indicated “Focused on both teaching and research” in the 5<sup>th</sup> Global Survey, while in the 6<sup>th</sup> Survey, 65% of HEIs “Focused roughly equally on both teaching and research” – a difference of 14%. At the same time, the number of predominantly teaching- focused HEIs increased in the 6<sup>th</sup> Global Survey by roughly the same percentage, going up from 18% to 30%.

This could mean that certain HEIs selecting “Focused on both teaching and research” in the 5<sup>th</sup> Global Survey were indeed focusing on both but not equally so.

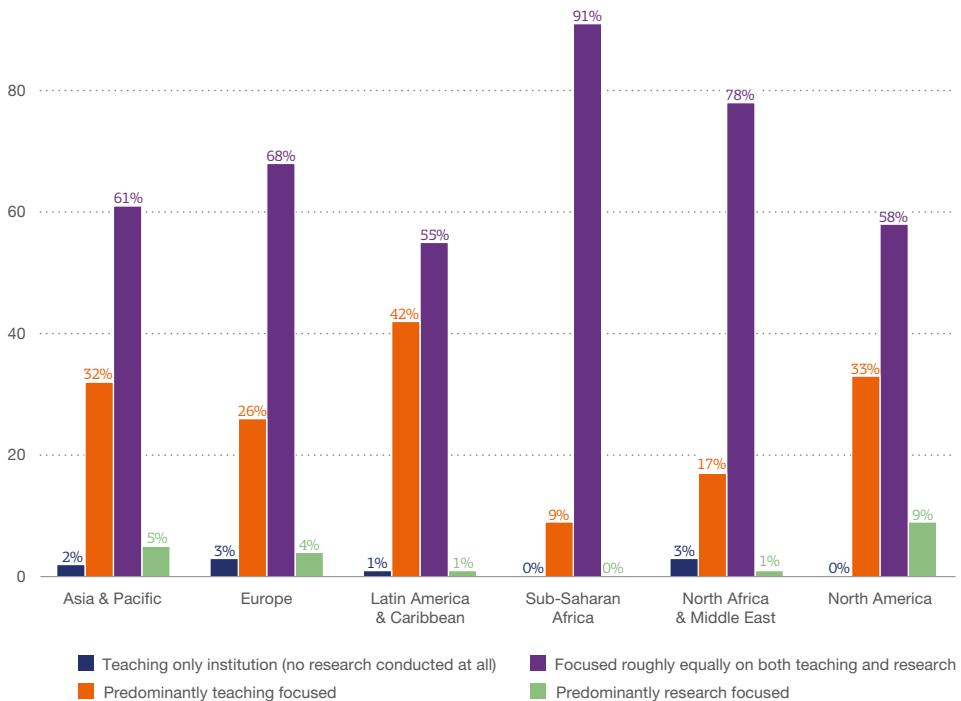
However, this is only a hypothesis, as the HEIs that replied to the two editions of the survey are not the same and there is also the possibility that the 6<sup>th</sup> IAU Global Survey simply attracted more predominantly teaching-focused HEIs.

### Regional and private vs. public analysis

There is an interesting difference between private and public HEIs. Almost three-quarters of public HEIs (72%) are focused roughly equally on both teaching and research, while only 52% of private HEIs are. On the contrary, 44% of private HEIs are predominantly teaching-focused compared to 22% of public HEIs. It can therefore be concluded that private HEIs are more teaching-oriented than public HEIs.

**Figure 81**

Teaching/research focus of HEIs by region



The regional analysis presents interesting differences although the majority of HEIs in all regions are focused roughly equally on both teaching and research. This group covers nearly all HEIs in Sub-Saharan Africa (91%), and 55% of HEIs in Latin America & the Caribbean. Latin America & the Caribbean is also the region with the highest percentage of predominantly teaching-focused institutions (42%) followed by North America (33%) and Asia & Pacific (32%). The region with the highest percentage of predominantly research-focused institutions is North America (9%). In all other regions, the percentage of this type of institution is very small, 5% or less. The percentage of teaching-only institutions is even smaller, less than 3% in all regions (in some of them there are no teaching-only institutions) (Figure 81).

## Involvement in international research

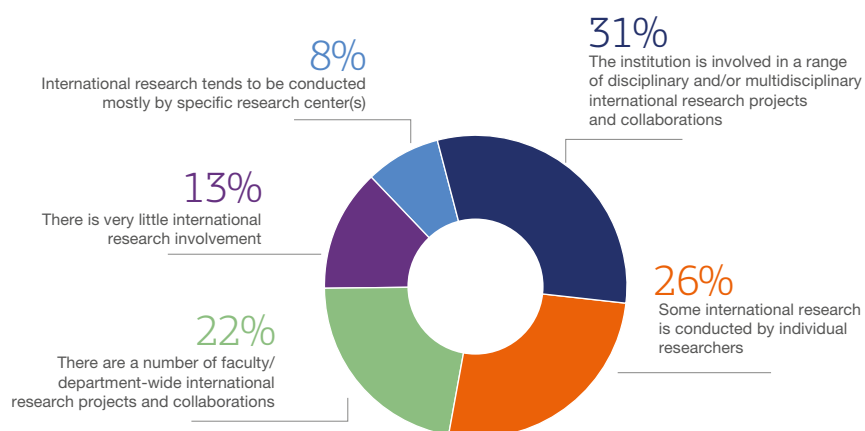
International research involvement is a cornerstone for fostering global academic collaboration and knowledge exchange. In this context, respondents were asked to select the sentence that best described their institution's involvement in international research.

The results reveal a diverse landscape of international research involvement. Almost a third of respondents (31%) indicate that their institutions actively participate in a spectrum of disciplinary and/or multidisciplinary international research projects and collaborations. Slightly over a quarter (26%) report that some level of international research is conducted by individual researchers. For 22% of respondents, there exists a significant number of faculty or department-wide international research projects and collaborations.

Contrastingly, 13% of institutions report very little international research involvement, suggesting limited engagement in global research initiatives. Moreover, 8% of respondents note that international research tends to be primarily carried out by specific research centres, indicative of a more concentrated approach to global research endeavours (Figure 82).

**Figure 82**

Institutional involvement in international research



Overall, these results show the multifaceted ways in which institutions engage with international research and highlight the diversity of approaches within the higher education landscape.

It is interesting to see how the situation changes when we divide HEIs based on their teaching/ research focus (Table 33).

**Table 33**

How would you describe the involvement in international research at your institution?	Predominantly research focused	Focused roughly equally on both teaching and research	Predominantly teaching focused
There is very little international research involvement	0%	9%	24%
Some international research is conducted by individual researchers	5%	19%	42%
There are a number of faculty/department-wide international research projects and collaborations	14%	26%	15%
International research tends to be conducted mostly by specific research center(s)	10%	8%	6%
The institution is involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations	71%	38%	13%

It is clear that the teaching/research focus of the institution has an impact on its involvement in international research.

Seventy-one percent of predominantly research-focused HEIs are highly involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations and all of them are involved in international research.

On the other hand, 66% of predominantly teaching-focused HEIs have very little involvement in international research (24%) or it is mainly an initiative of individual researchers (42%).

HEIs that are focused roughly equally on both teaching and research have a more diverse distribution with the biggest group of them (38%) involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations like predominantly research-focused HEIs but with a quarter (26%) having a number of faculty/department-wide international research projects and collaborations.

### Regional and private vs. public analysis

There are small differences between public and private HEIs. More public HEIs (34%) are involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations than private HEIs (25%) but, on the contrary, there are more private HEIs where there is very little international research involvement than public ones (17% vs. 11%).

This might be because for private institutions, the percentage of HEIs that are predominantly teaching-focused is double that for public ones.

To verify if this is the case the analysis is repeated taking into consideration only HEIs focused roughly equally on both teaching and research. However, interesting enough, the results are the same; still more public HEIs (40%) are involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations than private HEIs (32%), and more private HEIs where there is very little international research involvement than public ones (12% vs. 8%).

Therefore, there seems to be an effect of the private or public nature of institutions on their involvement in international research with more public than private HEIs being involved in international research.

Conducting a regional analysis is not straightforward as the distribution of HEIs that identified themselves as teaching/research-focused is not uniform in the different regions, as highlighted in the previous section. Especially the percentage of predominantly teaching focused varies from 9% in Sub-Saharan Africa to 42% in Latin America & the Caribbean.

Conducting a regional analysis including the three types of HEIs by focus together would give biased results. In order to avoid this problem, the regional analysis is performed by looking only at HEIs focused roughly equally on both teaching and research (470 HEIs). The number of HEIs focusing predominantly on teaching or predominantly on research is too small to allow for a regional analysis.

North America is the region with the highest percentage of HEIs involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations, with 48% indicating this in the survey. This group is the biggest in all regions except Sub-Saharan Africa.

The biggest group in Sub-Saharan Africa are those HEIs where some international research is conducted by individual researchers (33%). Somewhat surprisingly this percentage is also high in North America (32%) depicting quite a polarised situation when it comes to involvement in international research in this region.

Sub-Saharan Africa is also the region with the highest percentage of very little international research involvement (23%). When we add this percentage to that of HEIs where only some international research is conducted by individual researchers makes up more than half of HEIs in the region (56%). This is a worrying result for Sub-Saharan Africa as it shows that the region is lagging behind in international research involvement.

Asia & Pacific presents an interesting case, as it has a very varied landscape in which the groups of HEIs by the level of involvement in international research are of similar size.

In all other regions, the majority of HEIs are involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations or have a number of faculty/department-wide international research projects and collaborations (Table 34).

**Table 34**

How would you describe the involvement in international research at your institution?	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
There is very little international research involvement	21%	4%	11%	23%	9%	0%
Some international research is conducted by individual researchers	18%	17%	14%	33%	24%	32%
There are a number of faculty/department-wide international research projects and collaborations	21%	26%	33%	18%	24%	16%
International research tends to be conducted mostly by specific research center(s)	16%	10%	6%	5%	4%	4%
The institution is involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations	24%	43%	36%	21%	39%	48%



## Comparison with the 5<sup>th</sup> Global Survey

The comparison of these results with those of the 5<sup>th</sup> Global Survey reveals some interesting shifts in institutions' approaches to international research involvement.

The current edition indicates a rise in institutions engaged in a wide spectrum of disciplinary and/or multidisciplinary international research projects and collaborations, with 31% reporting such involvement, compared to 24% in the 5<sup>th</sup> edition. Whereas the percentage of respondents indicating that some international research is conducted by individual researchers remains relatively stable, around 26% in both surveys.

In the realm of faculty or department-wide international research projects and collaborations, a decrease is evident in the present edition, with 22% reporting such engagement, down from 27% in the 5<sup>th</sup> edition. Conversely, the proportion of institutions reporting very little international research involvement has slightly decreased, from 15% in the 5<sup>th</sup> edition to 13% in the present survey.

Finally, it is important to highlight that apart from the removal of the "I don't know" option, a notable alteration was made to the response options between the two editions. The option "Our institution is involved in defining national research projects," which represented 4% of responses in the 5<sup>th</sup> Global Survey, was substituted in the 6<sup>th</sup> Global Survey by "International research tends to be conducted mostly by specific research center(s)," accumulating 8% of responses.

In summing up, the comparison underscores the dynamic nature of involvement in international research across HEIs, revealing shifts in collaborative models, institutional priorities, and research center involvement over time.

At regional level, the 6<sup>th</sup> Global Survey witnesses a surge in HEIs involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations in North America (from 28% to 48%), in Latin America & the Caribbean (from 19% to 36%) and especially North Africa & the Middle East (39% in the 6<sup>th</sup> Global Survey, while in the 5<sup>th</sup> edition it was 4% in the Middle East and 29% in Africa as a whole).

On the contrary, the situation seems to have worsened in Sub-Saharan Africa where the percentage of HEIs with very little international research involvement is now 21% while it was 15% for Africa as a whole in the 5<sup>th</sup> edition.

The situation did not change much in Europe, where a small increase in the percentage of HEIs involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations can be observed (from 36% in the 5<sup>th</sup> edition to 43% in the 6<sup>th</sup> edition) and in Asia & Pacific where the diverse situation observed in the 6<sup>th</sup> edition was already present at the time of the 5<sup>th</sup> edition.

## Main sources of funding for international research

Securing adequate funding is vital for facilitating international research within HEIs. To gauge the primary sources of such funding, respondents were asked about the three main sources of funding for international research at their institutions.

The results reveal that three main funding sources are predominantly valued by HEIs:

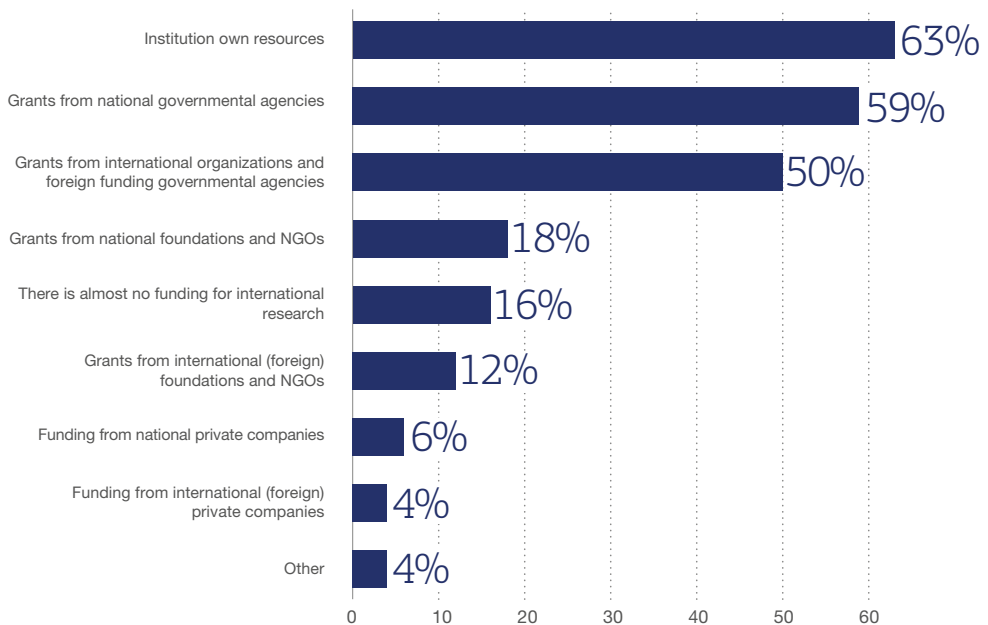
1. Institution own resources (63%)

2. Grants from national governmental agencies (59%)
3. Grants from international organisations and foreign funding governmental agencies (50%).

Conversely, other funding sources received notably lower emphasis, indicating a considerable disparity compared to the three major sources. For instance, the percentage of respondents reporting funds from private companies as one of the main sources closes the list with a mere 4% (Figure 83).

**Figure 83**

Main sources of funding for international research



Overall, the prominence of the three main funding channels highlights the instrumental role they play in driving international research initiatives within HEIs.

Once more the teaching/research focus of the institutions is very important.

Within both predominantly research-focused HEIs and HEIs focused roughly equally on both teaching and research the majority of HEIs identify the same three main sources of funding.

However, the majority of teaching-focused only identify their own institutional resources as the main source of funding for international research.

These types of HEIs are also the only ones with a non-negligible percentage of HEIs that have almost no funding for international research (27%).

On the contrary, predominantly research-focused have a better capacity to attract grants from national governmental agencies (86% of them, making this their most common source of funding) and grants from international organisations and foreign funding governmental

agencies (76%). A quarter of them also indicated grants from international (foreign) foundations and NGOs as an important source of funding.

Once again, the research focus of HEIs seems to have an impact mainly on their capacity to obtain grants from national or international agencies while predominantly teaching-focused HEIs have to rely more on the use of the institution's resources (Table 35).

**Table 35**

Main source of funding for international research	Predominantly research focused	Focused roughly equally on both teaching and research	Predominantly teaching focused
Institution own resources	52%	63%	66%
Grants from national governmental agencies	86%	63%	48%
Grants from international organisations and foreign funding governmental agencies	76%	57%	32%
Grants from national foundations and NGOs	15%	18%	17%
Grants from international (foreign) foundations and NGOs	24%	12%	8%
Funding from national private companies	15%	7%	3%
Funding from international (foreign) private companies	0%	5%	1%
There is almost no funding for international research	0%	11%	27%
Other	5%	5%	3%

### Regional and private vs. public analysis

In order to avoid the effects of over-representation of teaching-focused institutions both the private vs. public and regional analysis are carried out only on HEIs focused roughly equally on both teaching and research.

Eighty-one percent% of private HEIs are reliant on their institutional resources for internationalization of research and no other source of funding is common at the majority of private HEIs.

On the contrary, grants from national governmental agencies is the most common source of funding for public HEIs (72%) followed by grants from international organisations and foreign funding governmental agencies (64%) and only then by Institution own resources (55%).

Therefore, the results show a higher capacity of public HEIs in attracting grants from national and international agencies compared to private HEIs, which are almost obliged to rely on their own resources to conduct international research.

The regional analysis shows interesting differences between the regions.

Europe and North America are the only two regions where the most common source of funding comes from grants from national governmental agencies, three-quarters of European HEIs indicated this as the main source of funding and a striking 92% of North American HEIs did the same. This source of funding is common also in Latin America & the Caribbean (60%). On the

contrary, it is not common in North Africa & the Middle East where only 35% of HEIs indicated having such a source of funding.

In all other regions than Europe and North America, the most common source of funding is institutional resources. This source of funding is common at the majority of HEIs in all regions and in North Africa & the Middle East and Sub-Saharan Africa is the only one common at the majority of HEIs.

Grants from international organisations and foreign funding governmental agencies are also a very common source of funding in all regions with percentages of HEIs having them ranging from 47% in Latin America & the Caribbean to 67% in Europe.

No other source of funding is common at the majority of HEIs except grants from national foundations and NGOs which are common at 56% of North American HEIs.

The percentage of HEIs having no funding for international research is very small in Asia & Pacific, Europe and North America (less than 5%) but it reaches 15% in North Africa & the Middle East, 23% in Latin America & the Caribbean and 23% in Sub-Saharan Africa (Table 36).

**Table 36**

Main source of funding for international research	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Institution own resources	66%	52%	73%	67%	76%	56%
Grants from national governmental agencies	47%	75%	60%	47%	35%	92%
Grants from international organizations and foreign funding governmental agencies	61%	67%	47%	49%	49%	56%
Grants from national foundations and NGOs	8%	16%	18%	15%	19%	56%
Grants from international (foreign) foundations and NGOs	13%	11%	15%	21%	9%	0%
Funding from national private companies	8%	6%	5%	5%	11%	8%
Funding from international (foreign) private companies	3%	4%	4%	13%	6%	12%
There is almost no funding for international research	5%	4%	20%	23%	15%	4%
Other	5%	6%	4%	5%	2%	0%

### Comparison with the 5<sup>th</sup> Global Survey

A direct comparison with the 5<sup>th</sup> Global Survey is not feasible due to the change in the formulation of the question, from choosing the main source to choosing up to three most important, and slight modifications in the predefined list of options. The addition of “Grants from national foundations and NGOs” and “Funding from national private companies”, as well as the removal of the “don’t know” option, could impact the comparison. Nonetheless, an interesting perspective on the main funding sources for international research is still evident.

In the 5<sup>th</sup> Global Survey, the main funding sources for international research were notably centred around grants from international organisations and agencies, grants from national

agencies, and institution-owned resources. In the current survey, these three sources still reign and it is evident that they remain crucial for international research endeavours.

More interesting variations can be seen at the regional level.

In Sub-Saharan Africa the importance of grants from international organisations and foreign funding governmental agencies, which was identified as the main source of funding by Africa as a whole in the 5<sup>th</sup> Global Survey, seems to have decreased. At the same time, the importance of the institution's own funding seems to have increased. If this is true, it is a worrying evolution as institutions having less access to grants from international organisations and foreign funding governmental agencies have to rely more on their own institutional funding to conduct international research.

In Asia & Pacific and Europe the situation also seems to have slightly changed. If the three main sources of funding remain the same in both regions, it seems that the importance of grants from international organisations and foreign funding governmental agencies has slightly decreased while institutional own funding has increased in both regions. In Europe, the importance of grants from national governmental agencies also seems to have increased.

Instead, in North Africa & the Middle East (compared to the results for the Middle East only) and in the Americas the situation does not seem to have changed much from the one at the time of the 5<sup>th</sup> Global Survey.

## Effect of changes in political relations between countries on internationalization of research

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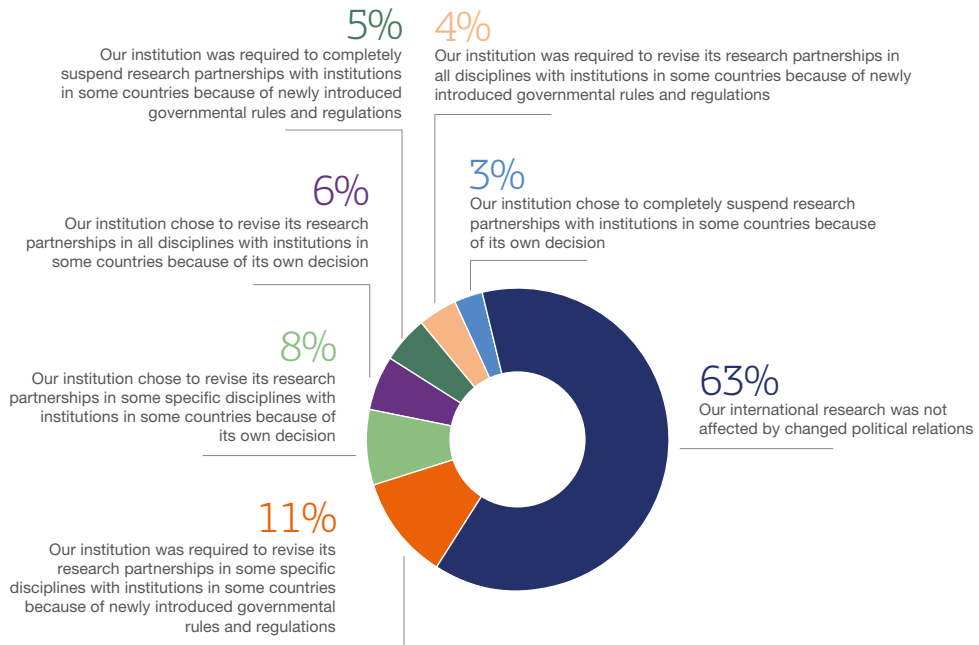
Amidst the dynamic context of changing global political relations over the past five years, respondents were asked to gauge the impact of these shifts on internationalization of research at their respective institutions.

As [Figure 84](#) shows, the vast majority of respondents indicated no impact on their institutions' international research (63%). While this single dominant response showcases the prevailing experience, others also emerged, albeit with markedly lower results. For instance, only 11% mentioned that their institutions needed to "Revise research partnerships due to newly introduced governmental rules and regulations," while an even smaller 3% acknowledged that their institutions had "Completely suspended research partnerships with certain countries by choice."

In summary, the changing political relations between countries seem to have had no major impact on the internationalization of research among HEIs. Nonetheless, this spectrum of responses encapsulates the varying ways institutions navigate, to a significantly lesser extent, the intricate interplay between research collaboration and geopolitical shifts ([Figure 84](#)).

**Figure 84**

Effect of changes in political relations between countries on internationalization of research



### Regional and private vs. public analysis

Public HEIs have been affected more than private HEIs by the changes in political relations between some countries in the world even if the majority of both report that they have not been affected (76% for private HEIs and 56% for public HEIs). It is interesting to note that all options selected are higher for public HEIs than for private ones, both those identifying changes induced by regulations from governments and those identifying changes undertaken by the institution's own decision.

Analysing the impact of changing political tensions on the internationalization of research by region provides a valuable lens through which to understand potential variations. While the global response pattern indicates a predominant lack of impact, regional differences can shed light on how geopolitical shifts have been perceived and managed differently across various parts of the world.

The first difference to note is that while in Latin America & the Caribbean (88%), North Africa & the Middle East (81%), Sub-Saharan Africa (70%) and Asia & Pacific (64%) the majority of respondents indicated that changing political relations had no significant impact on their institutions' international research endeavours, in Europe and North America, these percentages drop to 42% and 40% respectively, indicating that the majority of HEIs in these two regions have been impacted by the changes in relations between some countries in the world.

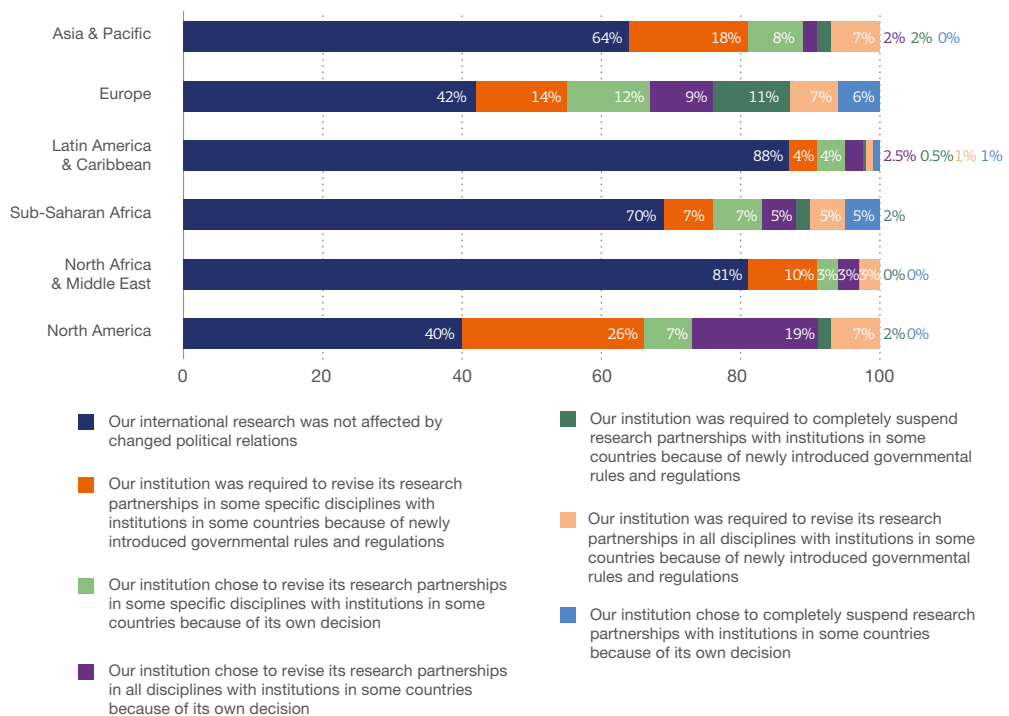
In Europe, subtle differences emerge among the other options, but as relatively higher percentages across various response options, indicating a more diverse range of impacts. Conversely, in North America two of the options stand out: "Our institution was required to revise its research partnerships in some specific disciplines with institutions in some countries

because of newly introduced governmental rules and regulations” is particularly noteworthy, with a response rate of 26%—far higher than in all other regions. Equally interesting are the 19% of respondents indicating that “Our institution chose to revise its research partnerships in all disciplines with institutions in some countries because of its own decision.” This seems to indicate that HEIs in North America were forced to revise research partnerships in some specific disciplines with institutions in some countries by newly introduced governmental rules and regulations but some of them went further and decided to revise their research partnerships in all disciplines with institutions in some countries.

In summary, the regional analyses reveal how changes in political relations between some countries in the world have impacted internationalization of research particularly in Europe and North America but not by much in all other regions. These differences highlight varying degrees of vulnerability and responsiveness to geopolitical dynamics, further emphasising the intricate interplay between research collaboration and evolving international relations (Figure 85).

**Figure 85**

Effect of changes in political relations between countries on internationalization of research by region



Finally, analysing replies at a national level for those countries that have enough replies, reveals that unfortunately there is a level of inconsistency in the way HEIs have replied to the questions. For instance, looking at replies from Germany, which has enough replies to be statistically relevant, 27% of HEIs replied that their institution was required to revise its research partnerships in some specific disciplines with institutions in some countries because of newly introduced governmental rules and regulations while 8% indicated that their institution was required to completely suspend research partnerships with institutions in some countries because of newly introduced governmental rules and regulations and 16% that their international research was not affected by changed political relations. This shouldn't be possible as governmental rules

and regulations apply to all HEIs in the country and therefore the fact that some HEIs had to suspend all research partnerships, while others only in some specific disciplines and others not at all seems doubtful.

The same level of inconsistency is also present also in Argentina and Mexico, the other two countries that have enough replies to be statistically relevant, but in this case, as more than 90% reported that international research was not affected by changed political relations, it is clear that the few HEIs reporting an effect of newly introduced governmental rules and regulations are to be considered outliers.

Therefore, caution should be used in interpreting the results of this question, which might also show some lack of knowledge or understanding of newly introduced governmental rules and regulations.



**F**

**INTERNATIONALIZATION  
AND SOCIETAL/  
COMMUNITY  
ENGAGEMENT**

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## Part F.

# INTERNATIONALIZATION AND SOCIETAL/ COMMUNITY ENGAGEMENT

The present part investigates the link between internationalization and societal/community engagement: if it exists, how it is implemented and the impact of internationalization on promoting intercultural understanding and fighting racism/xenophobia. The main results are reported below.

## Main results part F

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### *Link between internationalization and societal/community engagement*

- The majority of respondents (60%) indicated that there is an explicit link between internationalization and societal/community engagement at their institutions. However, only 22% conduct any assessment proving that activities are a means to benefit the local community.
- Asia & Pacific is the region where the highest percentage of HEIs (69%) indicated that there is an explicit link between internationalization and societal/community engagement. However, the highest percentage of HEIs that also conduct assessment proving this is found in Sub-Saharan Africa (30%).

### *Ways of linkage between internationalization and societal/community engagement*

- HEIs are using many ways to link internationalization and societal/community engagement, the most common ones being the organisation of events involving international speakers from other countries, the institution's commitment to regional and neighbouring areas and the active development and promotion of international development cooperation.
- Overall, activities that are common are common in all regions, but there are some exceptions, for instance "Teachers and researchers are encouraged to provide services or carry out other community engagement activities with foreign partners" is the most common activity in Sub-Saharan Africa, but not so much in the other regions.

### *Internationalization impact on intercultural understanding and racism/xenophobia*

- The majority of respondents (84%) indicated that internationalization has played a positive role in promoting intercultural understanding and reducing racism and xenophobia not only within their institutions but also in the local community.
- Despite some minor differences, the regional results confirm the overall positive impact of internationalization on promoting intercultural understanding and reducing racism and xenophobia in all regions of the world.

## Link between internationalization and societal/ community engagement

The intersection of internationalization and societal/community engagement in higher education is of paramount importance when ensuring HEIs are active contributors to their local communities and vice versa. This section delves into the extent to which these two facets are interconnected at HEIs worldwide.

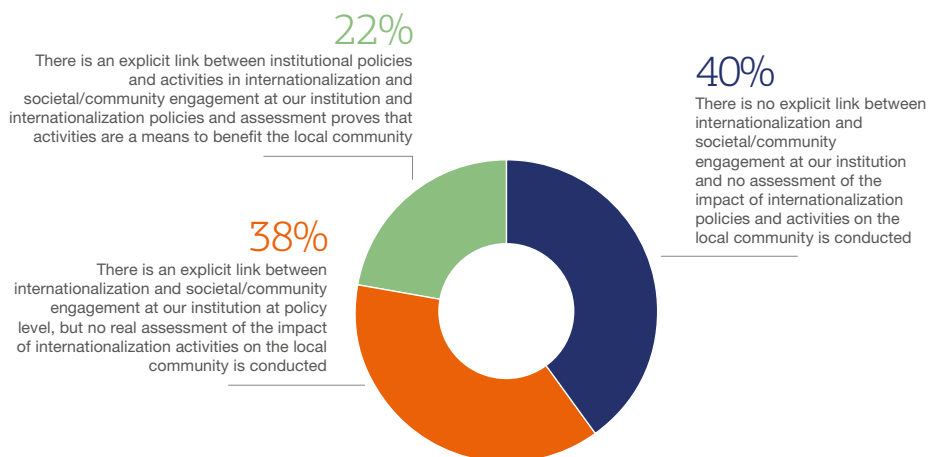
A significant 60% of respondents globally indicated an explicit link between internationalization and societal/community engagement at their institutions. This serves to underline recognition of the mutually reinforcing nature of these two facets of higher education.

However, it is worth noting that among these respondents, a substantial 38% indicated that there is no real assessment of the impact of internationalization on the local community. This signifies a potential gap in understanding the tangible outcomes and benefits that internationalization can bring to the surrounding society.

Interestingly, 40% of respondents reported that there is no explicit link between internationalization and societal/community engagement at their institutions. In essence, this suggests that a sizable portion of institutions do not perceive or acknowledge a direct connection between their internationalization efforts and their engagement with the local community (Figure 86).

**Figure 86**

Link between internationalization and community/societal engagement



Given the implicit nature of this disconnection, it is crucial for institutions to consider how their internationalization strategies can be more intentionally linked with societal/community engagement, recognizing the potential for these efforts to mutually enhance each other.

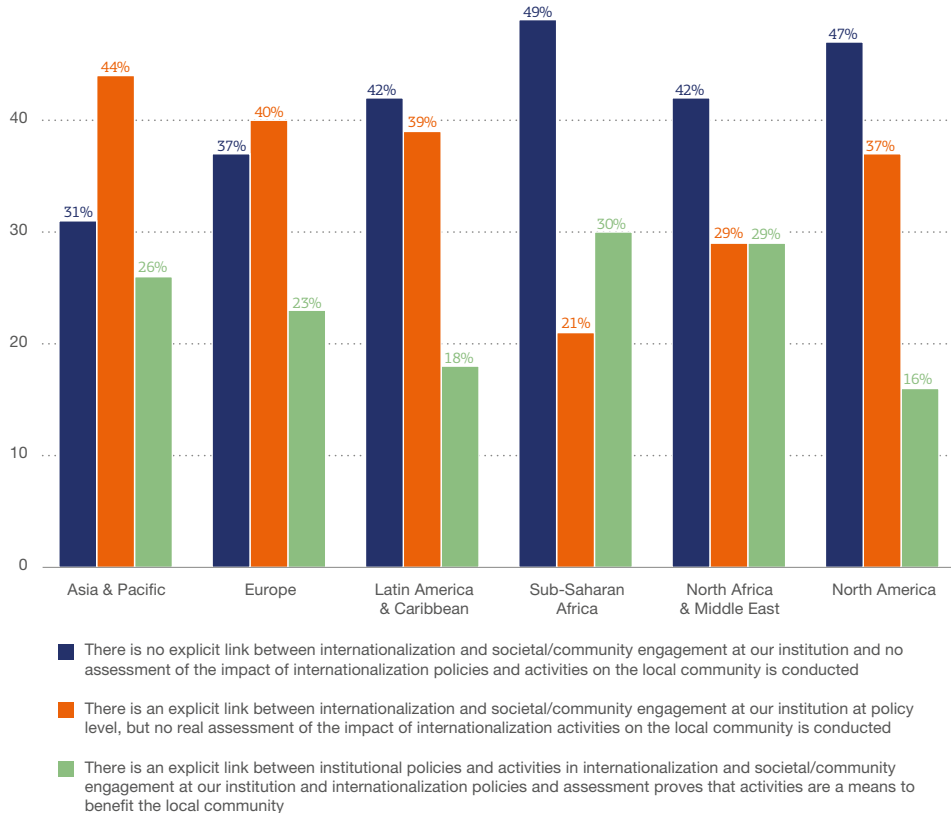
### Regional and private vs. public analysis

There are no major differences between private and public HEIs and their relationship between internationalization and societal/community engagement.

Figure 87 offers a regional perspective on the relationship between internationalization and societal/community engagement (Figure 87).

**Figure 87**

Link between internationalization and community/societal engagement by region



In Sub-Saharan Africa and North America, almost half of respondents indicated the absence of an explicit connection between internationalization and societal/community engagement. However, distinct patterns emerge between these regions when examining those institutions affirming such a link. Within Sub-Saharan Africa, 30% of respondents affirmed that their institutions not only acknowledge this relationship but also have concretized it through internationalization policies and associated impact assessments that highlight benefits to the local community, the highest percentage of all regions. In contrast, North America primarily reports an explicit link at the policy level, with 37% of respondents indicating this. However, a comprehensive impact assessment remains largely absent, with only 16% of North American institutions reporting the presence of both.

In Asia & Pacific, a robust 70% of respondents indicated the existence of an explicit link between internationalization and societal/community engagement at their institutions. Among these, 44% indicated that this link mainly manifests itself at the policy level, without any accompanying impact assessment.

The situation is similar in Europe, with 40% reporting the existence of an explicit link between internationalization and societal/community engagement at their institutions but without any accompanying impact assessment.

Latin America & the Caribbean are also experiencing a similar situation. Still, in this region, the biggest group of HEIs are those completely lacking any link between internationalization and societal/community engagement (42%).

This is also the biggest group of HEIs in North Africa & the Middle East (42%) but in this region the percentage of institutions where any link exists solely at the policy level, without any parallel impact assessment, and the percentage of institutions also conducting an assessment of internationalization activities on the local community are equal (29%).

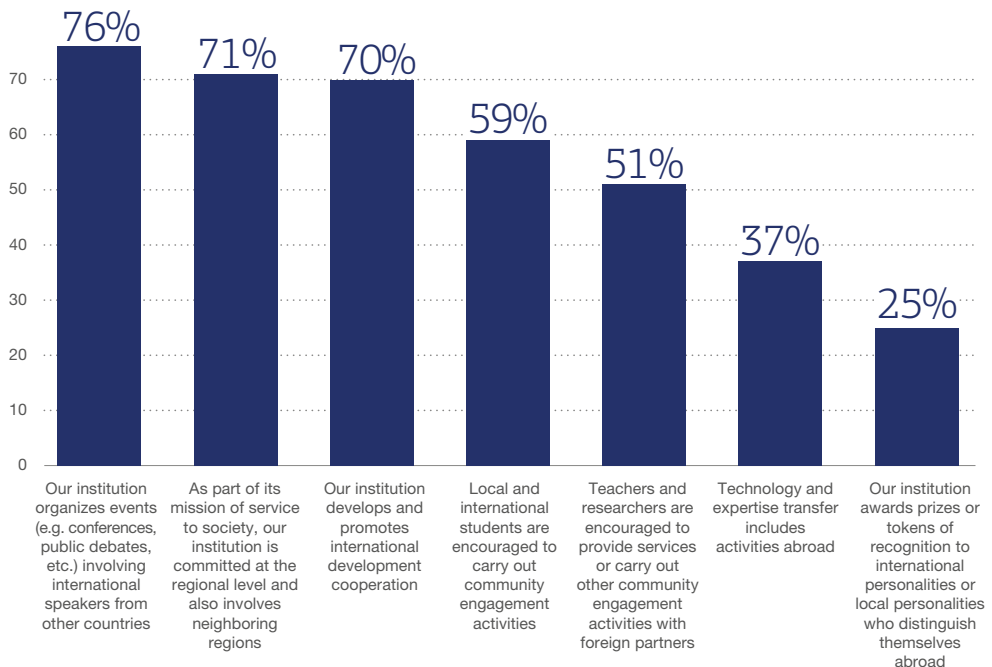
Overall, these regional variations present the diverse ways in which institutions worldwide perceive and manage the interplay between internationalization and their local communities.

## Ways of linkage between internationalization and societal/community engagement

Institutions can employ various strategies and practices to foster collaboration between internationalization initiatives and community engagement efforts. Respondents who indicated in the previous question that they do link internationalization and societal/community engagement were asked to select from a list how their institutions link internationalization and societal/community engagement (Figure 88).

**Figure 88**

Ways of linkage between internationalization and community/societal engagement



As Figure 88 shows, the most prevailing strategy among HEIs is the organisation of events involving international speakers from other countries, with 76% of respondents indicating this.

In line with their mission of service to society, 71% of respondents affirmed their institutions' commitment to regional and neighbouring areas as a crucial aspect of their societal engagement.

Another prominent strategy is the active development and promotion of international development cooperation, with 70% of respondents reporting their institutions' commitment in this area.

Close to 60% of respondents shared that their institutions actively encourage student (both local and international) involvement in local community activities.

Over half (51%) of respondents highlighted their institutions' support for academic staff (including teachers and researchers) in engaging with local communities alongside international partners.

Only the last two options are less common. For 37% of respondents, technology and expertise transfer, including activities conducted abroad, form an integral part of the link between internationalization and community engagement.

Last, the least common, but noteworthy, approach with a quarter of respondents (25%) is awarding prizes or tokens of recognition to international and local personalities who have made significant contributions abroad.

To conclude, these diverse approaches underscore the dynamic nature of the link between internationalization and societal/community engagement in higher education institutions. Each strategy represents a deliberate effort to bridge global perspectives with local impact, reinforcing the institution's role as a catalyst for positive change within both the academic and broader community spheres.

## Regional and private vs. public analysis

There are no substantial differences between private and public HEIs for what concerns the ways of link between internationalization and societal/community engagement.

The regional analysis reveals both similarities and differences between regions.

More than 70% of institutions in all regions organise events (e.g. conferences, public debates, etc.) involving international speakers from other countries. This is the most common activity in Europe (80% of HEIs), North Africa & the Middle East (75%) and North America (83%).

“As part of its mission of service to society, the institution is committed at the regional level and also involves neighbouring regions” is another common activity, present at more than 63% of HEIs in all regions and being the most common in Latin America & the Caribbean (74%) and Sub-Saharan Africa (77%).

The development and promotion of international development cooperation is also a common activity at the majority of HEIs in all regions and it is the most common in Asia & Pacific (74%).

Overall, activities that are present at the majority of HEIs at global level are also present at the majority of HEIs in all regions, except for the following:

1. “Teachers and researchers are encouraged to provide services or carry out other community engagement activities with foreign partners” is the most common activity in Sub-Saharan Africa (at 77% of HEIs), common also in North Africa & the Middle

East (63%) and North America (57%), but in all other regions is present only at half or fewer of HEIs.

2. “Technology and expertise transfer includes activities abroad” is present at the majority of HEIs only in Sub-Saharan Africa (at 64% of HEIs) and North America (57%).

Finally, “Our institution awards prizes or tokens of recognition to international personalities or local personalities who distinguish themselves abroad” is the only activity that is not common in any region (Table 37).

**Table 37**

Ways of linkage between internationalization and societal/community engagement	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Our institution organizes events (e.g. conferences, public debates, etc.) involving international speakers from other countries	72%	80%	70%	73%	75%	83%
As part of its mission of service to society, our institution is committed at the regional level and also involves neighbouring regions	63%	69%	74%	77%	73%	78%
Local and international students are encouraged to carry out community engagement activities	60%	58%	53%	73%	73%	70%
Our institution develops and promotes international development cooperation	74%	77%	63%	73%	65%	57%
Teachers and researchers are encouraged to provide services or carry out other community engagement activities with foreign partners	47%	50%	43%	77%	63%	57%
Technology and expertise transfer includes activities abroad	35%	41%	22%	64%	48%	57%
Our institution awards prizes or tokens of recognition to international personalities or local personalities who distinguish themselves abroad	16%	29%	18%	27%	45%	13%

## Internationalization impact on intercultural understanding and racism/xenophobia

Intercultural understanding and the issue of racism and xenophobia within HEIs and society are critical concerns for a supportive educational environment. Respondents were asked to provide their perspectives on whether internationalization efforts have contributed to increasing intercultural understanding and reducing racism and xenophobia, both within their institutions and within the local community.

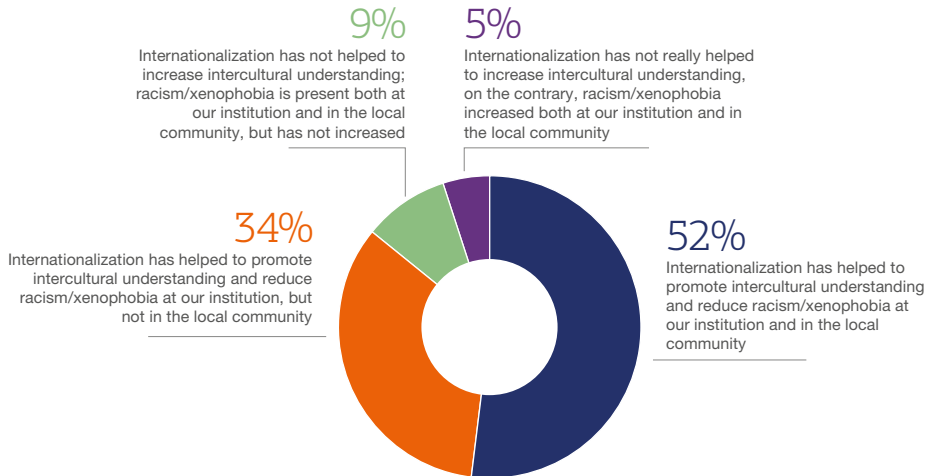
The vast majority of respondents, 84%, indicated that internationalization has played a positive role in promoting intercultural understanding and reducing racism and xenophobia. Of these respondents, 52% reported experiencing these positive impacts both within their institution and the local community, while 32% noted these positive effects solely within the institution itself.

On the contrary, 9% of respondents reported that internationalization efforts have not contributed to increasing intercultural understanding, and that racism and xenophobia persist both within their institution and the local community.

Lastly, 5% of respondents expressed concern that internationalization efforts have not only failed to increase intercultural understanding but have also led to an increase in racism and xenophobia within both their institution and the local community (Figure 89).

**Figure 89**

The impact of internationalization on intercultural understanding and racism/xenophobia



To sum up, while internationalization has made significant strides in promoting intercultural understanding and reducing racism and xenophobia within institutions, challenges persist in extending these positive impacts to the broader local community.

### Regional and private vs. public analysis

There are no major differences between private and public HEIs regarding the impact of internationalization on intercultural understanding and racism/xenophobia.

Looking at the regional results a few notable trends emerge in terms of how internationalization impacts intercultural understanding and reduces racism/xenophobia.

As Figure 90 shows, Europe stands out with 59% of HEIs, indicating that internationalization has contributed to increasing intercultural understanding and reducing racism and xenophobia, both within their institutions and the local community. Conversely, this percentage is lower in North Africa & the Middle East and North America (43% and 42% respectively).

However, when looking only at the positive impact within the institution, the regional percentages show a reversal of trends as North America and North Africa & the Middle East stand out with 41% and 37%, respectively. Latin America & the Caribbean also show a considerable percentage (40%). In contrast, Europe and Sub-Saharan Africa have lower percentages at 30% and 23%, respectively.

In North America we see a notable distinction as 19% of respondents reported that while internationalization did not increase intercultural understanding, neither did it cause an increase in racism/xenophobia.

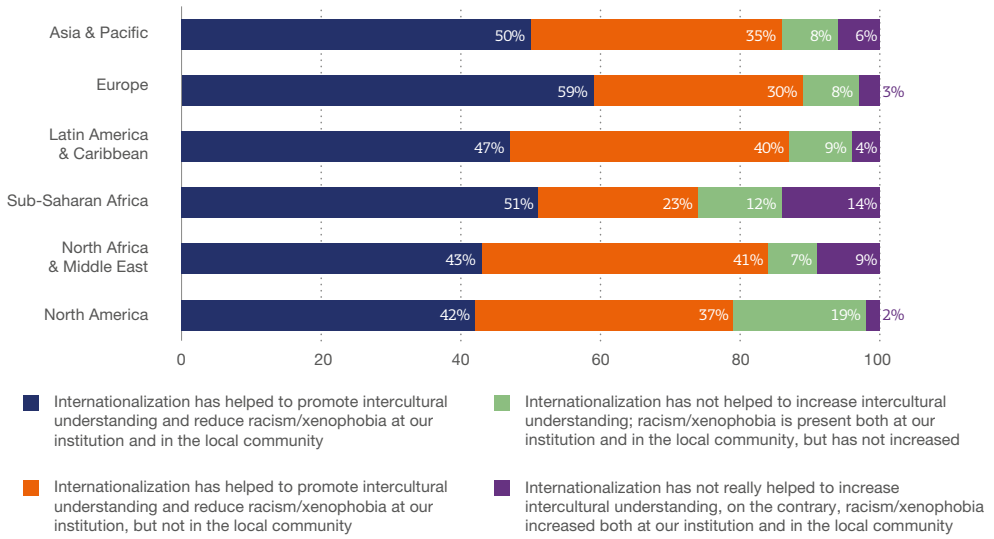


Finally, in Sub-Saharan Africa, a noteworthy 14% of institutions reported that internationalization did not contribute to increased intercultural understanding but did, in fact, potentially exacerbate racism/xenophobia.

Overall, the regional results show the positive impact of internationalization on promoting intercultural understanding and reducing racism and xenophobia, especially at the institutional level, and also in society (Figure 90).

**Figure 90**

The impact of Internationalization on intercultural understanding and racism/xenophobia by region





**EMERGING ISSUES  
AND THE FUTURE OF  
INTERNATIONALIZATION**

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# Part G.

## EMERGING ISSUES AND THE FUTURE OF INTERNATIONALIZATION

As the world becomes more interconnected, HEIs must grapple with a rapidly evolving landscape shaped by globalisation, sustainability imperatives, the rising importance of equity and inclusion, as well as shifting paradigms in internationalization. This final section of the 6<sup>th</sup> Global Survey examines how institutions are navigating these emerging challenges and reimagining their internationalization strategies in alignment with the pressing priorities of the future. The main results are reported below.

### Main results part G

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#### *Institutional policies/measures for refugees and migrants*

- Just under half of HEIs (46%) indicated that they had implemented special policies or measures in the last five years to accommodate the increasing numbers of refugees and migrants seeking enrolment in higher education. Such measures are more common at public than private HEIs.
- Europe stands out as the region with the highest percentage of institutions that have adopted such measures/policies, followed by North Africa & the Middle East. These two are the only regions where the majority of HEIs have policies/measures in place for refugees and migrants.
- Only 30% of HEIs in Sub-Saharan Africa and 21% in Asia & Pacific have adopted measures to support refugees, even though, according to UNHCR, they are, respectively, the first and third host region by number of refugees.

#### *Main policies/measures adopted*

- Two-thirds (63%) of HEIs that have special policies or measures in place to support refugees/migrants indicated taking direct action that support refugee/migrant students, academic, and administrative staff as a prominent policy or measure adopted by their institutions. The only other activity that is common at the majority of HEIs is the creation of scholarships/grants for refugee students, academic, and administrative staff (53%).
- The most common policies/measures adopted by public and private HEIs are different. Public HEIs are more oriented toward direct actions that support refugee/migrant students, academic, and administrative staff, offer specific support to refugees/migrants, and host academic, researchers, or administrative staff with a refugee background. Private HEIs are more oriented towards working with NGOs and civil society groups to facilitate refugee/migrant integration.
- The number of replies in some regions is low and therefore the regional analysis must be interpreted with care, but it does show some variability in terms of measures implemented between different regions.

## *Link between internationalization and sustainable development*

- The majority of HEIs (59%) link internationalization and sustainable development beyond climate action.
- More public HEIs are linking internationalization and sustainable development than private HEIs.
- Asia & Pacific is clearly the region where the link between internationalization and sustainable development is more advanced, as 52% of institutions in that region indicated that they have a policy or strategy in place to use internationalization as a means to support sustainable development.
- North America is the only region where the percentage of HEIs linking internationalization and sustainable development is less than 50%.

## *Internationalization and diversity, equity and inclusion*

- The overall majority of institutions (87%) confirmed that their internationalization policies and activities take into account diversity, equity and inclusion.
- The target group for equity and inclusion varies according to region: “People from low economic backgrounds” is the priority target group in Latin America & the Caribbean, Asia & Pacific and Sub-Saharan Africa; “People with disabilities”, in Europe and in North Africa & the Middle East and “Ethnic/cultural minorities” in North America.

## *Expected future challenges to recruit international degree-seeking students*

- Lack of financial support emerged as the most prominent challenge, the only one common to a majority of respondents (56%).
- Lack of financial support is the most important challenge identified by all regions except North Africa & the Middle East. In this region, along with Europe, there is no single common challenge identified by respondents, which depicts a very varied landscape of challenges faced.

## *Future priorities for internationalization*

- There is no common future priority at the global level.
- While in Asia & Pacific and Europe, there is no common future priority for the majority of HEIs, in all other regions there is at least one.
- “Academic staff training in international, intercultural and global competencies” is the most pressing future priority in Sub-Saharan Africa and North Africa & the Middle East, and to a lesser extent also in Latin America & the Caribbean, where the majority of HEIs also identify another future priority as “Internationalization and interculturalization of the curriculum at home for all students”. In North America, “Increasing the number of incoming degree-seeking international students” is the most pressing future priority.

## **Institutional policies/measures for refugees and migrants**

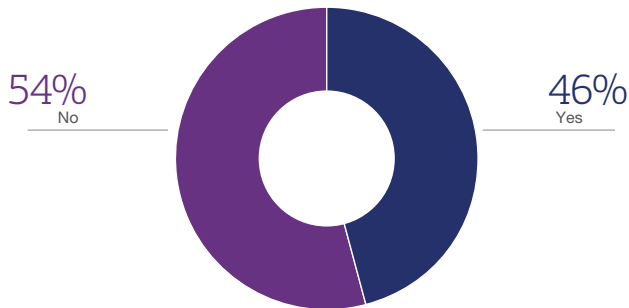
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According to UNHCR, the UN Refugee Agency, at the end of 2022, 108.4 million people worldwide were forcibly displaced. This is the highest number recorded in the last 50 years. (UNHCR, 2023) Among them, many are students, academic and administrative staff of higher education institutions who saw their paths in higher education in their home countries disrupted and who are now seeking to enter or re-enter academia in their host countries.

To begin, respondents were asked whether their respective institutions had implemented special policies or measures in the last five years to accommodate the increasing numbers of refugees and migrants seeking enrolment in higher education. The results reveal a fairly even split, with 54% indicating no such measures had been adopted, while 46% reported affirmative action in this regard (Figure 91).

**Figure 91**

Has your institution adopted special policies/measures in the last five years to respond to the increasing numbers of refugees and/or migrants seeking to enroll in HE?



### Regional and private vs. public analysis

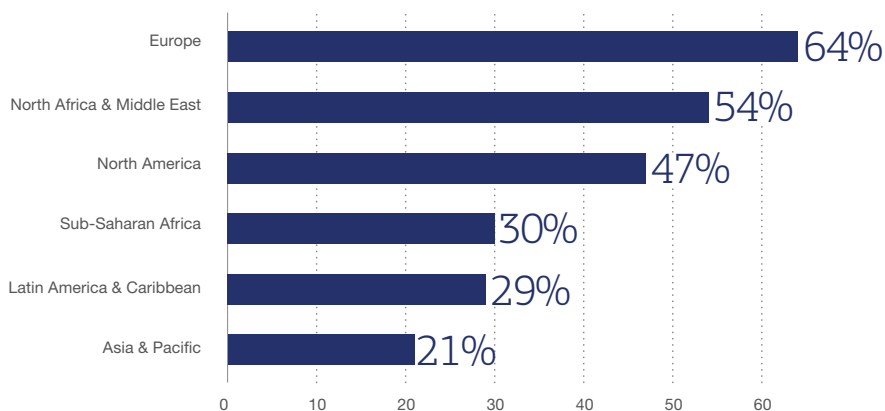
The analysis of differences between public and private institutions, as well as across regions, reveals some interesting differences.

While public institutions are split almost evenly with 52% of them having policies/measures for refugees and migrants, private institutions are notably less inclined to adopt such measures, with 66% responding in the negative and only 34% in the affirmative.

As can be seen in Figure 92, Europe stands out as the region with the highest positive response, where 64% of institutions have adopted such measures/policies, followed by North Africa & the

**Figure 92**

Institutional adoption of special policies/measures in the last five years in response to the increasing number of refugees and/or migrants seeking to enroll in HE by region



Middle East. These are the only two regions where the majority of HEIs have policies/measures for refugees and migrants. In North America the percentage is close to half (47%).

Conversely, Asia & Pacific stands out as the region with the lowest percentage, where only 21% of institutions have indicated implementation of special measures/policies to accommodate refugees and migrants. Latin America & the Caribbean and Sub-Saharan Africa follow closely behind, with 29% and 30% of HEIs respectively indicating having special measures (Figure 92).

It is interesting to note that the results for Europe (64% of HEIs having policies) are in line with the results of the EUA Trends survey, to which 49% of respondents stated that they have a strategy for students with a refugee(-like) background across the institution and 19% at some faculties.

Overall, these regional variations underscore the diverse institutional response to the challenges posed by the growing influx of refugees and migrants. While it is not surprising that Europe, which according to UNHCR is the second largest hosting region by number of refugees, is also the region with the highest number of HEIs having adopted special policies/measures to support them, the situation in Asia & Pacific and Sub-Saharan Africa is much more worrying. These two regions, according to UNHCR, are respectively the third and first host regions by number of refugees but only 21% and 30% of HEIs in those regions have adopted measures to support refugees.

## Main policies/measures adopted

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To gain a comprehensive understanding of how institutions worldwide are addressing the global challenge of supporting refugees and migrants, as well as to better grasp regional disparities, it is crucial to examine the specific policies and measures adopted by those institutions that responded affirmatively.

Globally, around two-thirds of respondents (63%) highlighted taking direct actions that support refugee/migrant students, academic, and administrative staff as a prominent policy or measure adopted by their institutions.

There is only one other activity that is common at the majority of HEIs and this is the creation of scholarships/grants for refugee students, academic, and administrative staff, with 53% of respondents selecting this.

Furthermore, approximately half of respondents (49%) reported offering specific support to refugees and migrants, reflecting a strong commitment to addressing their unique needs. An almost equal percentage (47%) mentioned adopting a strategy specifically intended to support refugee students, academic, and administrative staff.

Other measures are less common. For some institutions, collaborating with NGOs and civil society groups is a significant approach, with 42% mentioning such partnerships as a measure to facilitate the integration of refugees and migrants. Also noteworthy is that 41% of institutions have adapted their recognition procedures for admitting refugee students, demonstrating an inclusive stance.

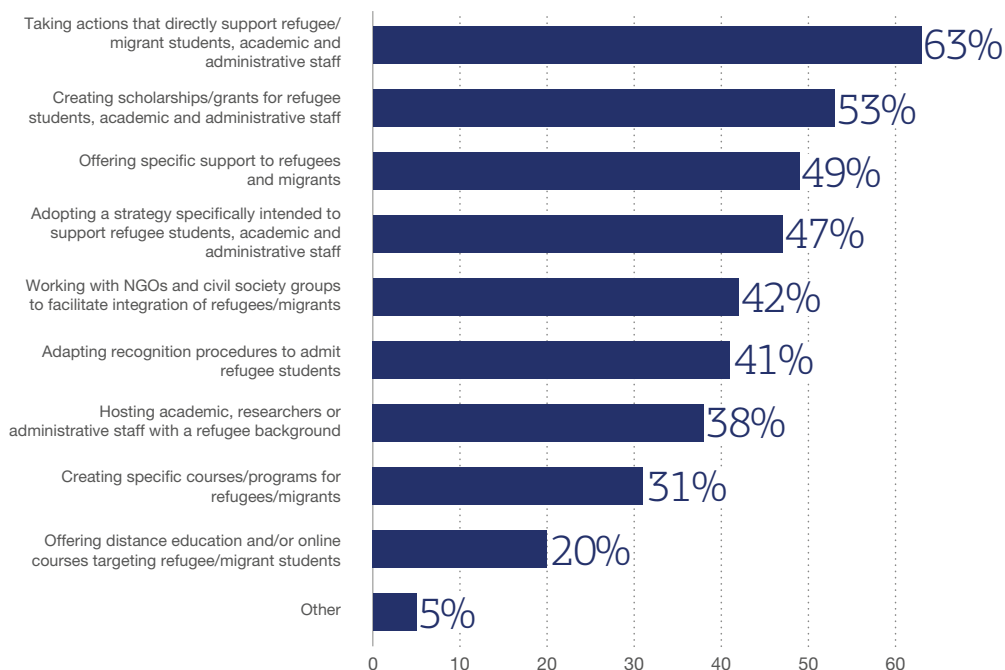
Just over one-third of institutions (38%) have hosted academic, research, or administrative staff with a refugee background as part of their support measures. Moreover, 31% have taken

the initiative of creating specific courses and programmes tailored to refugees and migrants, showcasing a commitment to their educational and professional development.

Lastly, as part of strategies adopted, 20% of institutions offer distance education and/or online courses targeting refugee and migrant students. While this percentage is lower, it still highlights the efforts made to provide accessible education for this group (Figure 93).

**Figure 93**

Institutional policies/measures adopted to support refugees and/or migrants



These comprehensive measures reflect the commitment of HEIs to inclusivity and support for refugees and migrants who play a vital role in enriching the academic and social fabric of institutions around the world. Nonetheless, it is essential to analyse regional disparities between public and private institutions to comprehend how these policies/measures are adapted to address specific regional needs and challenges.

### Regional and private vs. public analysis

Before analysing the results for public and private HEIs it is important to bear in mind the results of the previous question - that measures to support refugees/migrants are much more common in public than in private HEIs.

The majority of both public and private HEIs that have measures to support refugees/migrants take direct actions to support refugee/migrant students, academic, and administrative staff but this activity is more common in public than in private HEIs (66% vs. 53%). Offering specific support to refugees and migrants is also more common at public than private HEIs (52% vs.

41%) and public institutions host academic, researchers, or administrative staff with a refugee background twice as much as private institutions (44% versus 22%).

Conversely, private institutions exhibit a higher percentage (50%) in terms of working with NGOs and civil society groups to facilitate refugee/migrant integration than public institutions (39%).

A comprehensive regional analysis proves challenging due to the substantial variations in responses across regions. Europe is the region with the highest number of institutions (183) implementing support policies/measures, followed by Latin America & the Caribbean (65), North Africa & the Middle East (37), North America (30), and Sub-Saharan Africa and Asia & Pacific (13 each).

The number of HEIs in the last two regions is very low and therefore results for these regions must be interpreted with care.

Nonetheless, it is interesting to note that the most common activity in Europe (Taking actions that directly support refugee/migrant students, academic and administrative staff) is common also in North America and Sub-Saharan Africa, but not in other regions.

In North America this activity is second only to “Creating scholarships/grants for refugee students, academic and administrative staff”, an activity which is common in all other regions but Latin America & the Caribbean and Sub-Saharan Africa.

Creating scholarships/grants for refugee students, academic and administrative staff is also a common activity in all regions but Latin America & the Caribbean and Sub-Saharan Africa.

Latin America & the Caribbean present the interesting case that no activity among those proposed is common at the majority of HEIs.

Overall, these regional variations offer valuable insights into institutional responses to the growing numbers of refugees and migrants, especially for institutions and policymakers working towards improved support for these groups and promoting inclusivity within public and private institutions.

## Link between internationalization and sustainable development

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Higher education institutions around the world are increasingly orienting their strategies for sustainable development in line with the United Nations' 2030 Agenda, with the 17 SDGs guiding the global effort to address pressing challenges and promote global well-being.

However, universities are complex ecosystems with many simultaneous activities. Next to the core missions of teaching and research, internationalization and global engagement have been high on the agenda for higher education in recent years. As such, it is interesting to investigate how the emphasis on internationalization interacts with the strategic focus on sustainable development. For too long, the two concepts of internationalization and sustainable development have been treated completely separately within HEIs, despite their inherent interconnectedness.

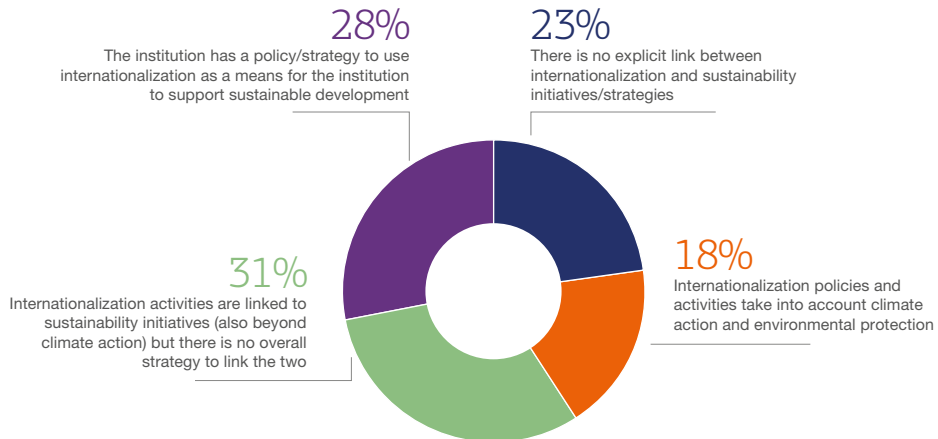
Given this interconnectedness of internationalization and sustainable development, this question delves into how institutions align these two crucial aspects.



Globally, the results indicate diverse approaches (Figure 94).

**Figure 94**

Internationalization and sustainable development



As Figure 94 depicts the majority of HEIs link internationalization and sustainable development even beyond climate action. Promisingly, 28% mentioned that their institutions have established a policy or strategy to utilise internationalization as a means of supporting sustainable development. This signifies a proactive commitment to intertwining internationalization and sustainability in a structured manner.

Furthermore, 31% reported that internationalization activities are linked to sustainability initiatives, extending beyond climate action. However, they do not have an overarching strategy to unify the two. This suggests a comprehensive approach, but with room for improvement.

Eighteen percent% stated that their internationalization policies and activities consider climate action and environmental protection, indicating a strong connection with SDG 13 on Climate action.

Finally, slightly less than a quarter (23%) of institutions reported no explicit link between internationalization and sustainability initiatives or strategies.

Exploring regional variations provides a deeper understanding of how institutions worldwide are linking internationalization and sustainable development in unique and context-specific ways.

### Regional and private vs. public analysis

When analysing the data by institution type (public and private), it seems that more public HEIs are linking internationalization and sustainable development. The percentage of HEIs reporting no explicit link is lower for public than for private HEIs (21% vs. 27%) and at the same time, the percentage of HEIs having a policy or strategy to utilise internationalization as a means of supporting sustainable development is higher for public (30%) than for private ones (23%).

The regional analysis reveals distinct regional patterns.

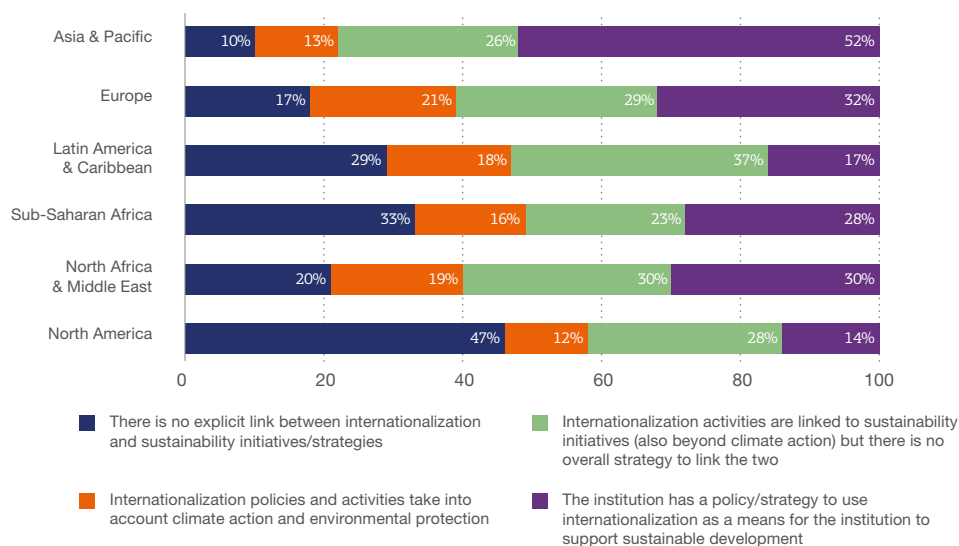
While almost all HEIs link internationalization and sustainable development in Asia & Pacific (90%) and the vast majority do so in Europe (83%) and North Africa & the Middle East (80%),

in North America only slightly half of them do with 47% of them indicating that there is no explicit link between internationalization and sustainability initiatives/strategies. North America is also the only region where the percentage of HEIs linking internationalization and sustainable development is less than 50%.

On the contrary, Asia & Pacific is clearly the region where the link between internationalization and sustainable development is more advanced, as 52% of institutions indicated that they have a policy or strategy to use internationalization as a means to support sustainable development. This is the only region where the majority of HEIs have such a policy/strategy (Figure 95).

**Figure 95**

Internationalization and sustainable development by region



Overall, these results are quite positive as they show that the majority of HEIs are linking internationalization and sustainable development and that they are not limiting themselves only to climate action, but they take a holistic approach to sustainable development in which internationalization can play an important and positive role.

However, at the same time, these results do unveil regional disparities in linking internationalization and sustainability within HEIs, which emphasise the need for region-specific strategies to move forward in the quest for sustainable development.

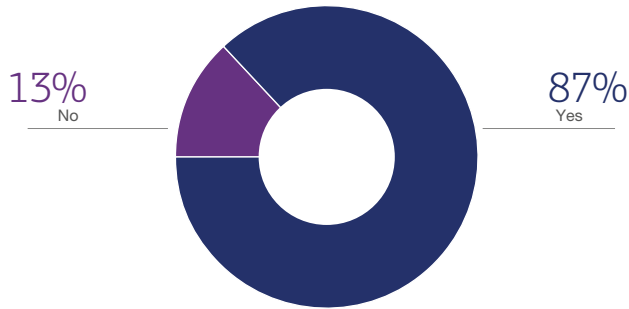
## Internationalization and diversity, equity and inclusion

The question of whether internationalization policies and activities within higher education institutions consider diversity, equity, and inclusion is paramount in addressing these fundamental aspects of equity in higher education. This is a central concern for ensuring that internationalization doesn't perpetuate existing disparities and inequities.

At the global level, the results indicate a strong alignment of internationalization efforts with diversity, equity, and inclusion. An impressive 87% of institutions confirmed that their internationalization policies and activities indeed take these factors into account (Figure 96).

**Figure 96**

Do internationalization policy/strategy and related activities at your institution take into account diversity, equity and inclusion?

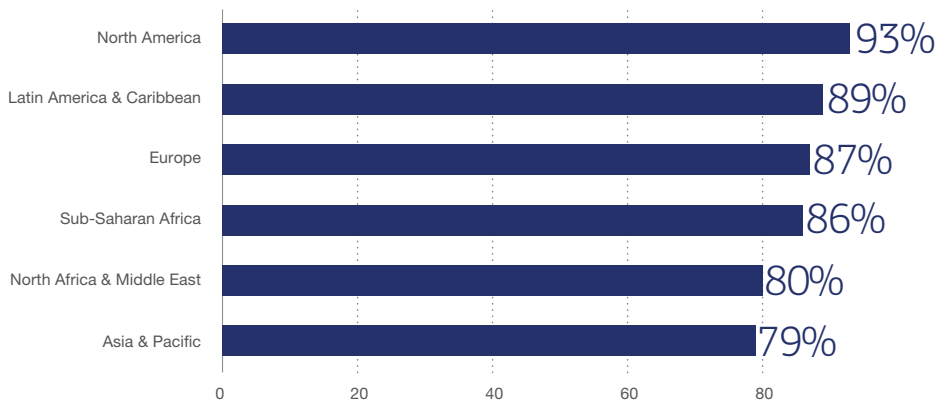


### Regional and private vs. public analysis

There is no difference between private and public HEIs. When looking at the regional responses, a consistent pattern emerges, with remarkably high positive responses across all regions. North America leads the way, with 93% of institutions indicating consideration for diversity, equity, and inclusion in their internationalization policies and activities (Figure 97).

**Figure 97**

Do internationalization policy/strategy and related activities at your institution take into account diversity, equity and inclusion? (Regional results)



The results for Europe (87%) are well aligned with the results of the EUA Trends survey, in which 88% of HEIs report having a strategy for diversity, equity and inclusion.

## Priority target groups for equity and inclusion

Respondents who recognized equity, diversity and inclusion as integral to their policies were asked to identify up to three priority groups.

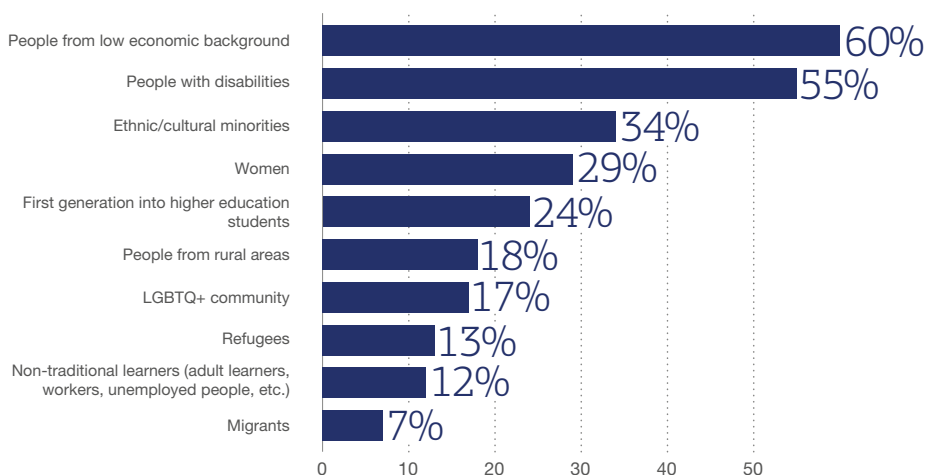
Globally, the results reveal that the majority of institutions prioritise people from low economic backgrounds (60%) and people with disabilities (55%) as priority groups for equity and inclusion.

Ethnic and cultural minorities are also a significant target group, with 34% of institutions emphasising their inclusion. Furthermore, 29% of institutions identified women as a priority group for equity and inclusion, and 24% of institutions have extended their focus to encompass first-generation higher education students.

Finally, there are small groups of institutions targeting people from rural areas, the LGBTQ+ community, refugees, non-traditional learners (including adult learners, workers, and unemployed individuals), and migrants as shown in [Figure 98](#).

**Figure 98**

Priority target groups for equity and inclusion



These diverse priority groups underline the multifaceted and inclusive nature of internationalization policies in higher education.

### Regional and private vs. public analysis

The differences between private and public HEIs are small, as the majority of both types of HEIs identify “People from low economic backgrounds” and “People with disabilities” as priority target groups. However, for private HEIs “People from low economic backgrounds” are clearly the most common target group while the two groups have been chosen by the same percentage of public HEIs.

The regional analysis reveals interesting differences that stimulate reflection. The priority target group is different in different regions.

“People from low economic backgrounds” is clearly the priority target group in Latin America & the Caribbean (at 71% of HEIs). The focus on this target group in this region is clear as no other target group is common at more than one third of HEIs.

“People from low economic backgrounds” are also the main target group in Asia & Pacific (63%) and Sub-Saharan Africa (65%) and it is a common target group at the majority of HEIs in all other regions with the lowest percentages of HEIs being 51% in Europe and North Africa & the Middle East.

In these two regions, the main target group is “People with disabilities”, selected by 73% of HEIs in Europe and 64% in North Africa & the Middle East. “People with disabilities” is also a common target group in Sub-Saharan Africa (62% of HEIs), but not in the other regions.

North America completely distinguishes itself as the main target group in this region is “ethnic/cultural minorities” (at 78% of HEIs) and another important target group is the “first generation higher education students” (63%). In none of the other regions are these target groups considered a priority.

Sub-Saharan Africa, and to a lesser extent North Africa & the Middle East, stand out with the highest emphasis on “Women”, reporting 57% and 42%, respectively (Table 38).

**Table 38**

Target group	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
People from low economic background	63%	51%	71%	65%	51%	68%
People with disabilities	47%	73%	34%	62%	64%	35%
Women	31%	23%	31%	57%	42%	8%
Ethnic/cultural minorities	22%	30%	34%	38%	33%	78%
People from rural areas	41%	14%	19%	22%	18%	0%
Non-traditional learners (adult learners, workers, unemployed people, etc.)	6%	11%	16%	14%	9%	10%
LGBTQ+ community	24%	11%	26%	8%	5%	28%
Refugees	0%	27%	1%	3%	18%	5%
Migrants	4%	13%	4%	3%	4%	3%
First generation into higher education students	37%	16%	28%	0%	22%	63%

Once more the results for Europe indicating people with disabilities as the main target group are in line with those of the EUA Trends survey, even if the questions asked in the IAU and EUA surveys were not exactly the same. EUA Trends asked for the main aspects addressed in inclusion policies and disability came out tops for both students (at 74% of HEIs) and staff (at 60% of HEIs).

To sum up, these insights underscore the strong commitment to diversity, equity, and inclusion within internationalization policies across HEIs. However, notable variations in the specific target groups highlight the necessity for region-specific strategies in promoting diversity

and inclusion. Therefore, recognizing the historical and societal factors shaping each region's priorities is pivotal to the development of effective initiatives, ultimately fostering a genuinely inclusive and equitable landscape for higher education worldwide.

## Expected future challenges to recruit international degree-seeking students

Recruiting international degree-seeking students holds a distinct significance within the broader landscape of internationalization in higher education. These students play a vital role in fostering cultural exchange, enriching academic discourse, and contributing to institutions' global reach. Therefore, understanding the main challenges in recruiting them is pivotal for institutions aiming to create inclusive and diverse academic environments.

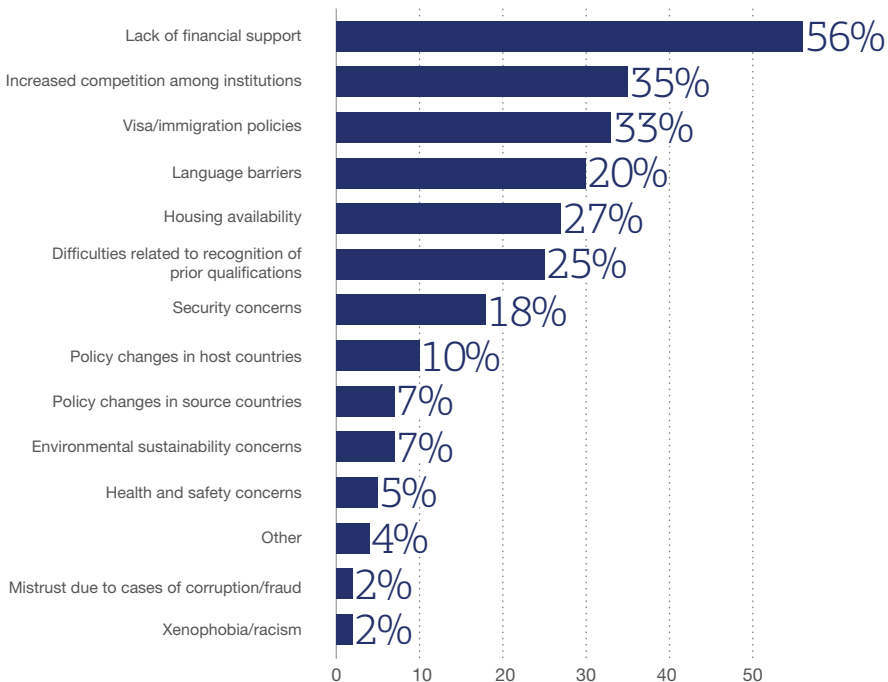
At the global level, when asked about the expected main challenges in recruiting international degree-seeking students, institutions highlighted several key concerns.

Lack of financial support emerged as the most prominent challenge, the only one selected by the majority of respondents (56%).

Among all other possible challenges, increased competition among institutions was the second most common, cited by slightly over one-third of the respondents (35%). Visa and immigration policies, often critical for the mobility of international students, were noted as a challenge by

**Figure 99**

Expected future challenges with regard to recruitment of international degree-seeking students



one-third of institutions (33%). Language barriers, crucial for academic success, were reported as a significant challenge by nearly one-third of institutions (30%).

Housing availability, related to student welfare and comfort, was identified by more than a quarter of respondents (27%). Difficulties related to recognition of prior qualifications, an essential aspect of the enrolment process, were noted by a quarter of the institutions (25%). Security concerns, which encompass both safety and geopolitical issues, were identified as a challenge by 18% of institutions. Policy changes in host countries and source countries were reported as challenges by 10% and 7% of institutions, respectively. Environmental sustainability concerns, while growing in importance globally, were mentioned by 7% of respondents. Health and safety concerns were raised by 5% of institutions.

A very small percentage of respondents indicated challenges related to mistrust due to cases of corruption or fraud (2%) and issues of xenophobia or racism (2%) (Figure 99).

Overall, while these challenges are diverse, they reflect the intricate and multi-dimensional nature of international student recruitment on a global scale. Hence, it is imperative for institutions to proactively address these challenges to ensure they can continue in attracting and supporting international degree-seeking students effectively. Nonetheless, the diverse landscape at the global level does warrant a closer look in order to point out the different challenges across regions.

### Regional and private vs. public analysis

There are no major differences between public and private HEIs in the most common challenges, but it is interesting to note that public institutions see housing availability as a greater challenge than public ones (30% vs 21%), whereas increased competition among institutions is higher among private institutions (39% vs 32%). Another interesting difference is the challenge of security concerns among private HEIs (23% vs 14%) as well as visa/immigration policies (37% vs 31%).

At the regional level, lack of financial support is the most important challenge identified in all regions but North Africa & the Middle East, where it is the second most important.

However, the degree to which this is selected varies quite substantially; if the vast majority of HEIs in North America (74%), Sub-Saharan Africa (70%), Latin America & the Caribbean (67%) and Asia & Pacific (61%) clearly identify it as the most important challenge, in Europe only 45% do so.

In Europe and North Africa & the Middle East there is no single common challenge identified by respondents, depicting a very varied landscape of challenges that might depend on the country where the institution is based, or on its nature but this is something that the present survey cannot reveal.

While all challenges listed are common to all regions, lack of financial support is identified by a majority in all regions except Europe and North Africa & the Middle East, with the largest number of respondents selecting this (74%) in North America. Here, Visa/immigration policies and Increased competition among institutions were also selected by a majority of respondents, with the latter being identified as the most common challenge in North Africa & the Middle East (Table 39).

**Table 39**

Expected future challenges to recruit international Degree-seeking students	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Lack of financial support	61%	45%	67%	70%	43%	74%
Visa/immigration policies	19%	43%	20%	23%	36%	60%
Increased competition among institutions	39%	38%	24%	28%	46%	53%
Housing availability	16%	38%	19%	23%	16%	35%
Security concerns	11%	9%	31%	21%	14%	12%
Policy changes in host countries	13%	8%	13%	19%	6%	9%
Difficulties related to recognition of prior qualifications	21%	25%	28%	33%	25%	7%
Language barriers	27%	28%	42%	30%	19%	5%
Health and safety concerns	11%	3%	4%	9%	13%	5%
Environmental sustainability concerns	11%	7%	4%	16%	9%	5%
Policy changes in source countries	11%	8%	7%	0%	7%	5%
Xenophobia/racism	0%	1%	2%	2%	3%	5%
Mistrust due to cases of corruption/fraud	0%	1%	2%	9%	0%	5%
Other	5%	5%	2%	2%	6%	7%

## Future priorities for internationalization

As the last question, institutions were asked to identify the three most important future priorities for internationalization at their institutions.

Interestingly, while the results show that there is no future priority that stands head and shoulders above the rest at the global level, the most common are “Academic staff training in international, intercultural and global competencies” selected by 44% of HEIs and “Internationalization and interculturalization of the curriculum at home for all students” (40% of HEIs).

These are followed by two priorities selected by one third of HEIs - “Enhancing our research capacity and quality through international partnership” (33%) and “Increasing the number of incoming degree-seeking international students” (32%).

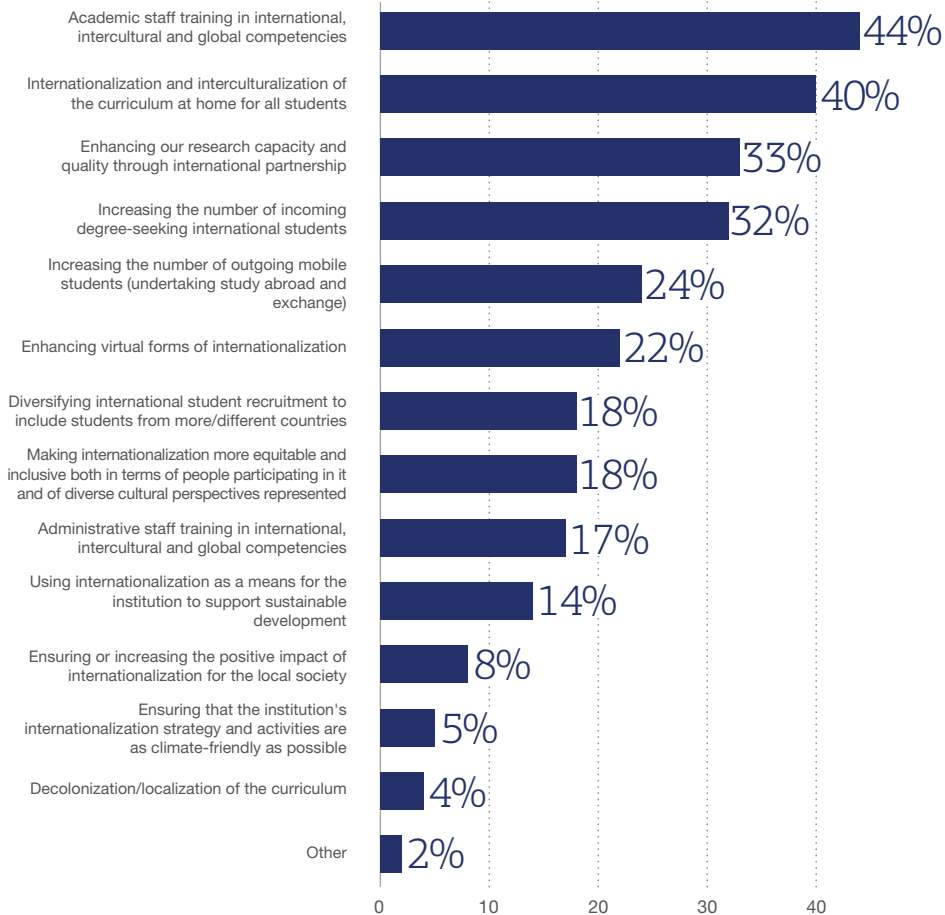
About a quarter of HEIs selected “Increasing the number of outgoing mobile students (undertaking study abroad and exchange) activities” (24%) and 22% selected “Enhancing virtual forms of internationalization”.

All other priorities were selected by less than 20% of HEIs (Figure 100).



**Figure 100**

Most pressing future priorities for internationalization



These results depict a very varied landscape in terms of the most pressing future priorities at the global level and make the regional analysis interesting to understand if there are regional specificities.

### Regional and private vs. public analysis

The major difference between public and private is that almost half of private universities identify “Academic staff training in international, intercultural and global competencies” as the most common future priority. This is also the joint most common future priority at public HEIs and has the same level of importance as “Internationalization and interculturalization of the curriculum at home for all students”, both selected by 42% of HEIs.

The regional analysis reveals interesting regional specificities. While in Asia & Pacific and Europe, there is no one common future priority selected by a majority of HEIs, in all other regions there is at least one.

As can be seen in Table 40, Sub-Saharan Africa is the region that clearly identifies the most pressing future priority - “Academic staff training in international, intercultural and global competencies”, selected by 81% of respondents.

The same is true in North Africa & the Middle East, albeit by a smaller but still very high percentage of HEIs (67%).

The majority of North American HEIs (53%) identify “Increasing the number of incoming degree-seeking international students” as the most pressing future priority. This result combined with the relatively high percentages of “Diversifying international student recruitment to include students from more/different countries” (44%) and “Increasing the number of outgoing mobile students (undertaking study abroad and exchange) activities” (40%) depicts an internationalization in North America still very focused on student mobility in the future.

Finally, Latin America & the Caribbean is the only region where the majority of HEIs identify two future priorities “Internationalization and interculturalization of the curriculum at home for all students” (56% of HEIs) and “Academic staff training in international, intercultural and global competencies” (52%). These two priorities are linked as the second one is necessary to achieve the first one.

**Table 40**

Most pressing future priorities for internationalization	Asia & Pacific	Europe	Latin America & the Caribbean	Sub-Saharan Africa	North Africa & the Middle East	North America
Academic staff training in international, intercultural and global competencies	44%	34%	52%	81%	67%	5%
Enhancing our research capacity and quality through international partnership	40%	31%	34%	35%	39%	23%
Internationalization and interculturalization of the curriculum at home for all students	37%	35%	56%	30%	20%	37%
Increasing the number of incoming degree-seeking international students	44%	37%	18%	28%	38%	53%
Administrative staff training in international, intercultural and global competencies	11%	22%	11%	23%	22%	9%
Enhancing virtual forms of internationalization	11%	20%	30%	21%	9%	10%
Increasing the number of outgoing mobile students (undertaking study abroad and exchange) activities	18%	24%	27%	14%	22%	40%
Decolonization/localization of the curriculum	6%	3%	4%	14%	6%	5%
Using internationalization as a means for the institution to support sustainable development	11%	18%	13%	12%	17%	5%
Diversifying international student recruitment to include students from more/different countries	19%	21%	12%	9%	9%	44%
Making internationalization more equitable and inclusive both in terms of people participating in it and of diverse cultural perspectives represented	19%	14%	21%	9%	13%	35%
Ensuring or increasing the positive impact of internationalization for the local society	8%	10%	8%	7%	9%	2%
Ensuring that the institution's internationalization strategy and activities are as climate-friendly as possible	5%	9%	1%	0%	1%	9%
Other	0%	3%	1%	0%	1%	5%

Although the regional results do not completely identify common priorities in all regions, they do show a focus on “Academic staff training in international, intercultural and global competencies” in many regions (although not at all in North America) on “Internationalization and interculturalization of the curriculum at home for all students” and on “Increasing the number of incoming degree-seeking international students” (Table 40).

The results for the most pressing future priorities remind us that the higher education landscape is very diverse and it is not surprising, then, that priorities are also diverse. They also show us that even if there is still an important focus on student mobility, especially in certain regions, North America above all, there is also an important focus on internationalization of the curriculum at home and on academic staff training in international, intercultural and global competencies which is fundamental to achieving both successful integration of international students and successful internationalization of the curriculum at home for all students, including those unable to experience a period of mobility abroad.

# CONCLUSION

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# Conclusion

The 6<sup>th</sup> IAU Global Survey on the Internationalization of Higher Education sheds some light on the most important trends and evolutions in internationalization around the world and provides for some interesting comparisons between private and public HEIs and between HEIs across different regions. It also provides insights on the evolution of certain trends over time by comparing the results with previous editions of the survey whenever this is possible.

It is worth mentioning that there is an increasing level of importance paid to internationalization by academic leaders around the world, and especially so at institutions that previously considered internationalization of low importance.

This result reverses a worrying trend of growing inequality among HEIs that was highlighted in the 5<sup>th</sup> edition. We should also mention that HEIs around the world see increased international cooperation and capacity building as the main benefit of internationalization, a trend already highlighted by the 5<sup>th</sup> global survey and confirmed by this 6<sup>th</sup> edition. Although in terms of priority there is still a focus on student mobility, international cooperation and capacity building are the activities that have increased the most over the last five years, showing a move towards a convergence between expected benefits and activities to achieve them. The survey also shows that the world is diverse and that for some aspects of internationalization, there is no common denominator at the global level, as exemplified for instance by the great variety of risks and challenges/obstacles. In some cases, the regional analysis helps explain this great variety, for instance with the clear identification of “Brain drain” as the most important risk in Sub-Saharan Africa, but in other cases diversity persists also at the regional level, demonstrating that multiple factors other than the geographic location of institutions are important in defining trends.

The responses also underline the widespread nature of internationalization as a strategic process, but at the same time they highlight a number of limitations, especially in terms of funding. They also show how internationalization is still a top-down approach mainly steered by academic leadership and the internationalization office, and call for reflection on the possible risks of lack of engagement from the rest of the academic community that such an approach implies. They also show that there is still a geographic imbalance at the global level, with regions in the Global North (Europe and North America) still attracting the most attention, while South-South cooperation, besides intra-regional, is still not considered a priority. The survey also confirms a tendency towards regionalisation in some regions but not in others, and the specificity of North America as a region, which more often than not, presents divergent results from other regions.

Another interesting result is that the role played by the COVID-19 pandemic in driving changes in internationalization has been much less important than expected. The pandemic has had a role in driving some changes, especially the development of virtual internationalization, but it has not been the only or the most deciding factor behind the evolution of internationalization over the last five years.

The 6<sup>th</sup> Global Survey also provides insights into more detailed aspects of internationalization in teaching and learning, research and society/community engagement, especially links between internationalization and important priorities such as sustainable development, diversity, equity and inclusion. Among these results, we see the positive role played by internationalization in fighting racism/xenophobia, promoting intercultural understanding, and achieving sustainable development.

In summing up, the 6<sup>th</sup> IAU Global Survey paints a picture of the current state of play of internationalization around the world, its recent evolution, and the possible ways it could evolve in the future. The survey is by no means exhaustive and it no doubt asks more questions than it answers; for many aspects, the survey results provide a starting point for more research. Despite its limitations and possible need for improvement, the 6<sup>th</sup> IAU Global Survey remains the only comprehensive institutional survey on internationalization at the global level and provides invaluable information unavailable anywhere else. One worrying signal to emerge from the 6<sup>th</sup> IAU Global Survey is decreasing participation both at the global level and in specific regions of the world. For such an endeavour to be successful, participation is paramount. It is only with the contribution of HEIs themselves that the survey can become an important source of information. At the IAU, we hope that this worrying trend of decreasing participation will be reversed in future editions of the survey and we call upon HEIs around the world to join forces with us to help understand the evolution of internationalization.

As we conclude the report, it is worth saying that, unlike previous editions, the current version of the report is freely available in electronic format. IAU took this decision to offer free access to the higher education community as the 6<sup>th</sup> IAU Global Survey Report is an invaluable resource, and should serve as a catalyst for research, practice, and policy evolution in the realm of global academic internationalization. It beckons researchers, practitioners and policymakers to engage with its insights, not only for deeper investigation but also to aid strategic policy transformation.

Far from being a simple conclusion, this report represents a critical juncture for ongoing inquiry and effective action in the area of internationalization, positioning the IAU as a global voice for higher education, committed to harnessing these findings for the advancement of the international academic community and for society as a whole.

The 6<sup>th</sup> IAU Global Survey report is by no means an end point, but a starting point for more research and action. The IAU will continue its research endeavours to understand internationalization around the world and will use the survey results to improve its services and programmes for the benefit of the global academic community and for society at large.



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# Annex 1

## Advisory Committee - 6<sup>th</sup> IAU Global Survey

### Advisory Committee - Representatives from sponsors and partners

Name	Role and affiliation	Regional representation
Olusola Oyewole	Secretary General, Association of African Universities (AAU)	Africa
Élodie Decostre	Director of International Relations - Academy for Research and Higher Education (ARES)	Europe
Michael Gaebel	Director, Higher Education Policy, European University Association (EUA)	Europe
Villano Qirhazi	Head of the Education Department, Council of Europe (CoE)	Europe
Juan Rayón González	President - Erasmus Student Network (ESN)	Europe
Eva Maria Vögtle	Postdoctoral Research Associate - German Centre for Higher Education Research and Science Studies (DZHW)	Europe
Marijke Wahlers	Head of Department International Affairs -German Rectors Conference (HRK)	Europe
Roberto Escalante Semerena	Secretary-General, Association of Universities of Latin America and the Caribbean (UDUALC)	Latin America and the Caribbean
Julio Theiler	Adviser to the Executive Secretariat and the International Relations Commission, National Interuniversity Council of Argentina (CIN)	Latin America and the Caribbean
Dorothea J. Antonio	Deputy Executive Director, Knowledge Development - NAFSA	North America

Name	Role and affiliation	Regional representation
Gerardo Blanco	Academic Director, Center for International Higher Education, Boston College	North America
Elizabeth Buckner	Assistant Professor, Ontario Institute for Studies in Education, University of Toronto	North America
David Julien	Executive Director, Inter-American Organization for Higher Education (OUI-IOHE)	Americas
Anne-Laurence Pastorini	Project manager, UNIMED - Mediterranean Universities Union	Mediterranean region (Europe, Middle East and North Africa)
Francisco Marmolejo	Higher Education President & Education Advisor Qatar Foundation Higher Education - President's Office	Middle East
Catinca Birna-Guelly	Cheffe de Département des Réseaux Recherche et Expertise - Direction des Réseaux - Agence Universitaire de la Francophonie (AUF)	Global
William Bramwell	Senior Research Officer - The Association of Commonwealth Universities (ACU)	Global
Sherine Omondi	Steering Committee Member - Global Student Forum (GSF)	Global

### Advisory Committee - Members

Name	Role and affiliation	Regional representation
Wiseman Jack	President - International Education Association Of South Africa (IEASA)	Africa
Kefa Simwa	Executive Director - African Network for Internationalization of Education (ANIE)	Africa
Etsuko Katsu	Member of IAU WG on Internationalization Professor, Department of Economics, Meiji University	Asia & Pacific

Name	Role and affiliation	Regional representation
Betty Leask	Professor Emeritus, School of Education, La Trobe University, Melbourne	Asia & Pacific
Vidya Yeravdekar	Pro Chancellor, Symbiosis International University	Asia & Pacific
Hans De Wit	IAU Senior Fellow	Europe
Irina Ferencz	Director - Academic Cooperation Association (ACA)	Europe
Laura Rumbley	Associate Director Knowledge Development and Research - European Association for International Education (EAIE)	Europe
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Marta Losada	Member of IAU WG on Internationalization Dean of Science, NYU Abu Dhabi	Middle East
Marcio Barbosa	President - Associação Brasileira de Educação Internacional (FAUBAI)	Latin America & the Caribbean
Jocelyne Gacel Avila	Professor and UNESCO Chair on Internationalization of HE and Global Citizenship at the University of Guadalajara, Mexico	Latin America & the Caribbean
Andrew Deeks	Chair of the IAU WG on internationalization President and Vice- Chancellor, Murdoch University	Global
Eva Egron-Polak	IAU Senior Fellow	Global

Note: Advisory Committee members are listed with the role and affiliation they held when they joined the Advisory Committee, they might have changed role and affiliation during the lifetime of the survey.

# Annex 2

## Pilot group - 6<sup>th</sup> IAU Global Survey

### Member institutions

Name	Country	Regional representation
Mahidol University	Thailand	Asia & Pacific
Toyo University	Japan	Asia & Pacific
Hamburg University	Germany	Europe
Sapienza University of Rome	Italy	Europe
Université de Lorraine	France	Europe
Universidad Cooperativa de Colombia	Colombia	Latin America & the Caribbean
Universidad de Los Lagos	Chile	Latin America & the Caribbean
Universidad Nacional de Quilmes	Argentina	Latin America & the Caribbean
An-Najah University	Palestine	Middle East
Sadat City University	Egypt	Middle East
Manouba University	Tunisia	North Africa
Florida International University	United States of America	North America
Wayne State University	United States of America	North America
Durban University of Technology	South Africa	Sub-Saharan Africa

## Annex 3

# Analysis of duplicate replies

The 6<sup>th</sup> IAU Global Survey collected 782 replies from 722 HEIs from 110 countries and territories around the world through an online questionnaire open from 16 January until 16 June 2023.

HEIs were requested to provide data specific to the academic year that began in the year 2021 and were explicitly instructed to submit only one reply after conducting internal consultations. This approach sought to ensure that the survey responses accurately represent the institutional perspective rather than individual opinions.

While the majority of HEIs adhered to the survey guidelines, it is important to acknowledge that the survey identified 123 instances of duplicated replies, some of which included triple or even quadruple responses from the same institution out of the total 782 responses collected.

Duplicated replies can be categorized into two types: “Type 1” represents instances where the same person submitted multiple responses to the survey, while “Type 2” indicates that two different individuals within the same institution submitted separate responses. Out of the 123 duplicate replies, 59 were classified as “Type 1,” and 64 fell under “Type 2.”

### **Type 1: Same respondent replying twice to the survey**

The presence of duplicate replies from the same respondent may be attributed to two main factors: change in the institution’s internationalization process during the survey period, leading to revised responses; or simply respondents’ inadvertent duplication of their submission. Even in the latter case, these duplicate responses can provide valuable insights, particularly in identifying the questions that are more “objective” versus “subjective” in nature.

The majority of duplicated replies are very similar, with variations observed only in some questions. Likert scale questions, such as those assessing the importance of key internal and external drivers of internationalization (see Q.13&14), or the funding sources for international activities at the institution (Q.26), display the most variability. However, the variations in responses are not substantial, primarily involving shifts from “important” to “somewhat important,” while changes from “important” to “not important” are minimal. A similar pattern is observed in rating scale questions that inquired about changes in the importance of internationalization activities over the past five years (Q.32). Trend questions regarding the changing importance of possible ways to internationalize the curriculum or extracurricular activities over the last five years at the institution (Q.46&48) show slightly more variance than the aforementioned ones.

These variations may be attributed to changes in the internationalization process at the institution, evolving understanding, or simply, an unintentional mistake in recalling their previous response.

On the other hand, some close-ended questions demonstrated noticeable variations in responses. For instance, the question assessing the linkage between internationalization and societal/community engagement exhibits a remarkable variance (see Q.53). Similarly, the question examining the connection between internationalization and sustainable development displays variances (see Q.58), indicating different views on how these two areas are connected at the institution.

It is important to note that these variations may not necessarily reflect differences in institutional priorities. Instead, they may be influenced, once again, by individual factors specific to the respondent, such as their personal experiences, subjective perception, evolving opinions over time, superficial knowledge of the subject, or even an unintentional mistake in recalling their previous response.

## **Type 2: Different respondents from the same institution**

Duplicated responses from the same institution indicate a lack of a consultative process to present a unified institutional perspective on internationalization. The analysis of duplicate replies from different individuals within the institution provides valuable insights into the diverse perceptions of internationalization among various stakeholders.

As observed in Type 1, duplicate responses from different individuals within the same institution also display variations. However, certain questions within the Type 2 category display a higher degree of cross-respondent variance - are more susceptible to have different replies- within the same institution.

Similar to Type 1, Likert scale questions (see Q.18,19 & 26), and rating scale questions (see Q.46) exhibit notable variability. However, the variations in responses are not substantial. These variations emphasize a certain degree of subjectivity of these questions, irrespective of whether the same individual responded twice or different respondents responded to the same question. However, these variations in responses are not substantial, primarily involving shifts from “important” to “somewhat important,” while changes from “important” to “not important” are minimal. In the case of two different individuals replying to the survey, these differences may also be attributed to a lack of consensus among different actors and highlight the presence of diverse perspectives within the institution.

On the other hand, some multiple close-ended questions show remarkable differences in responses, surpassing the number of variations observed in Type 1. The duplicate replies (Q.11) indicate diverse perspectives on the factors influencing institutional prioritization of internationalization for the institution’s leadership. While the general themes of global connections, student demand, and accreditation/rankings are shared among the different actors inside the institution, there are nuances in their priorities. Heads of institutions and international offices tend to emphasize strategic partnerships and student interest, while staff from international offices place more emphasis on income generation and stakeholder engagement within the institution.

These variations suggest that different roles within the institution may have specific perspectives and priorities when it comes to internationalization, reflecting their unique responsibilities and areas of focus.

The level of awareness regarding potential risks of internationalization varies among actors inside the same institution at both the institutional and social levels (Q.16 & Q.17). Heads of international offices focus on strategic planning and highlight challenges related to institutional priorities and competition. Whereas, staff members from international offices prioritize operational concerns such as increased workload, limited inclusivity, and pursuit of prestigious

partnerships. Institutional leaders, including heads of institutions, bring a broader perspective, expressing concerns about curriculum, inclusivity, and brain drain.

These differing perspectives reflect distinct roles and expertise, contributing to varying levels of awareness among actors involved in internationalization efforts.

The responses to the close-ended questions on future priorities for internationalization (Q.61) and the most pressing future of internationalization at the institution (Q.62) also exhibit notable variations. Regarding future priorities, heads of international offices and staff members from different institutions emphasize challenges such as language barriers, lack of financial support, and difficulties in recognizing prior qualifications. However, staff members place a stronger emphasis on language barriers and financial support. In terms of the most pressing future of internationalization, heads of international offices prioritize academic staff training, research capacity enhancement, and curriculum internationalization. Conversely, staff members focus on increasing the number of international students, virtual internationalization, and promoting equity.

Once again, variations in responses can be attributed to the distinct roles and responsibilities within each institution. However, the subjective nature of the questions may have also influenced these diverse responses.

The identified patterns of duplicate responses from multiple individuals within the same institution underscore the lack of consensus and the presence of diverse perspectives. These findings suggest that personal perceptions, rather than relying solely on official documentation, may have influenced respondents' replies. This further emphasizes the subjective nature of their responses and reinforces the understanding of the varying viewpoints within the institution.

## **Conclusion**

The analysis of duplicate responses is a reminder that surveys are not free from perception bias among respondents, no matter how clear the instructions are. It also shows that Likert scale, rating scale, and close/ended questions are particularly susceptible to response variations. Close/ended questions, in particular, showed the most differences when multiple individuals from the same institution responded. These findings underscore the importance of careful interpretation when analyzing such question types.



# Annex 4

## List of countries and regions

The following list of countries consists of the 193 United Nations member states, plus two UN Non-member states (Holy See and State of Palestine) and three territories± the two special administrative regions of the People's Republic of China (Hong Kong and Macao) and Taiwan, Province of China.

The Official names of countries are taken from UN M49<sup>1</sup> and ISO3166<sup>2</sup> as they were in June 2023.

### **Asia and Pacific**

Afghanistan  
Australia  
Bangladesh  
Bhutan  
Brunei Darussalam  
Cambodia  
China  
China Hong Kong SAR  
China Macao SAR  
Fiji  
India  
Indonesia  
Japan  
Kazakhstan  
Kiribati  
Korea (Democratic People's Republic of)  
Korea (Republic of)  
Kyrgyzstan  
Lao People's Democratic Republic  
Malaysia  
Maldives  
Marshall Islands  
Micronesia (Federated States of)  
Mongolia  
Myanmar  
Nauru  
Nepal  
New Zealand  
Pakistan  
Palau  
Papua New Guinea  
Philippines

Samoa  
Singapore  
Solomon Islands  
Sri Lanka  
Taiwan, province of China  
Tajikistan  
Thailand  
Timor-Leste  
Tonga  
Turkmenistan  
Tuvalu  
Uzbekistan  
Vanuatu  
Viet Nam

### **Europe**

Albania  
Andorra  
Armenia  
Austria  
Azerbaijan  
Belarus  
Belgium  
Bosnia and Herzegovina  
Bulgaria  
Croatia  
Cyprus  
Czechia  
Denmark  
Estonia  
Finland  
France  
Georgia  
Germany  
Greece  
Holy See

Hungary  
Iceland  
Ireland  
Italy  
Latvia  
Liechtenstein  
Lithuania  
Luxembourg  
Malta  
Moldova (Republic of)  
Monaco  
Montenegro  
Netherlands  
North Macedonia (Republic of)  
Norway  
Poland  
Portugal  
Romania  
Russian Federation  
San Marino  
Serbia  
Slovakia  
Slovenia  
Spain  
Sweden  
Switzerland  
Türkiye  
Ukraine  
United Kingdom of Great Britain and Northern Ireland

### **Latin America and Caribbean**

Antigua and Barbuda  
Argentina

1. <https://www.un.org/en/about-us/member-states#goto5> (accessed June 2023)

2. <https://www.iso.org/iso-3166-country-codes.html> (accessed June 2023)

Bahamas  
 Barbados  
 Belize  
 Bolivia (Plurinational State of)  
 Brazil  
 Chile  
 Colombia  
 Costa Rica  
 Cuba  
 Dominican Republic  
 Dominica  
 Ecuador  
 El Salvador  
 Grenada  
 Guatemala  
 Guyana  
 Haiti  
 Honduras  
 Jamaica  
 Mexico  
 Nicaragua  
 Panama  
 Paraguay  
 Peru  
 Saint Kitts and Nevis  
 Saint Lucia  
 Saint Vincent and the Grenadines  
 Suriname  
 Trinidad and Tobago  
 Uruguay  
 Venezuela (Bolivarian Republic of)

***Middle East and***

***North Africa***

Algeria  
 Bahrain  
 Egypt  
 Iran (Islamic Republic of)  
 Iraq  
 Israel  
 Jordan  
 Kuwait  
 Lebanon  
 Mauritania  
 Morocco  
 Oman

Palestine (State of)  
 Qatar  
 Saudi Arabia  
 Syrian Arab Republic  
 Tunisia  
 United Arab Emirates  
 Yemen

***North America***

Canada  
 United States of America

***Sub-Saharan Africa***

Angola  
 Benin  
 Botswana  
 Burkina Faso  
 Burundi  
 Cabo Verde  
 Cameroon  
 Central African Republic  
 Chad  
 Comoros  
 Congo  
 Côte d'Ivoire  
 Democratic Republic of the Congo  
 Djibouti  
 Equatorial Guinea  
 Eritrea  
 Eswatini  
 Ethiopia  
 Gabon  
 Gambia (Republic of the)  
 Ghana  
 Guinea  
 Guinea-Bissau  
 Kenya  
 Lesotho  
 Liberia  
 Libya  
 Madagascar  
 Malawi  
 Mali  
 Mauritius  
 Mozambique  
 Namibia  
 Niger  
 Nigeria

Rwanda  
 Sao Tome and Principe  
 Senegal  
 Seychelles  
 Sierra Leone  
 Somalia  
 South Africa  
 South Sudan  
 Sudan  
 Tanzania (United republic of)  
 Togo  
 Uganda  
 Zambia  
 Zimbabwe

# Annex 5

## Statistical data for each country

In the following table, the following data are reported for each country:

- Name of the country
- Number of HEIs in WHED, which represent the overall population for the specific country
- Number of replies received from single HEIs in that specific country
- Percentage of HEIs replying, which is the ratio between the number of institutions replying to that survey in a specific country and the overall number of HEIs in that country
- Number of institutions needed to reply for statistical relevance (NSR), which is the theoretical number of institutions needed to reply in a specific country for the results to be statistically relevant with a 10% margin of error at 80% confidence level
- N-NSR, which is the difference between the number of institutions replying in a specific country and the theoretical number needed for results to be statistically relevant with a 10% margin of error at 80% confidence level. If N-NSR is positive or equal to zero, the results for that specific country are statistically relevant with a 10% margin of error at 80% confidence level.

Only the four countries highlighted in the table below gathered a sufficient number of replies for a national analysis to be statistically relevant with a 10% margin of error at 80% confidence level.

Argentina and Azerbaijan have enough replies for a statistical relevant analysis with a 10% margin of error at 85% confidence level and Mexico for a statistical relevant analysis with a 10% margin of error at 90% confidence level.

The following countries have no institution listed in the WHED<sup>3</sup> and therefore they are not included in the following table:

- Antigua and Barbuda
- Dominica
- Kiribati
- Marshall Islands
- Micronesia (Federated States of)
- Nauru
- Palau
- Saint Kitts and Nevis
- Saint Lucia
- Saint Vincent and the Grenadines
- Tuvalu
- Vanuatu

No reply was received from any of them.

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3. WHED includes HEIs recognized by their national authorities that offer at least a degree at ISCED level 6 or higher: <http://uis.unesco.org/sites/default/files/documents/international-standard-classification-of-education-isced-2011-en.pdf> (Accessed July 2023).

Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
Afghanistan	129	1	1%	31	-30
Albania	28	2	7%	17	-15
Algeria	92	2	2%	28	-26
Andorra	2	1	50%	2	-1
Angola	44	1	2%	21	-20
Argentina	131	38	29%	31	7
Armenia	58	4	7%	24	-20
Australia	94	1	1%	29	-28
Austria	71	6	8%	26	-20
Azerbaijan	45	26	58%	21	5
Bahamas	1	0	0%	1	-1
Bahrain	13	0	0%	10	-10
Bangladesh	120	3	3%	31	-28
Barbados	3	0	0%	3	-3
Belarus	44	0	0%	21	-21
Belgium	64	17	27%	25	-8
Belize	2	0	0%	2	-2
Benin	32	0	0%	18	-18
Bhutan	3	0	0%	3	-3
Bolivia (Plurinational State of)	52	4	8%	23	-19
Bosnia and Herzegovina	41	2	5%	20	-18
Botswana	14	0	0%	10	-10
Brazil	1441	18	1%	40	-22
Brunei Darussalam	4	0	0%	4	-4
Bulgaria	50	7	14%	23	-16
Burkina Faso	48	0	0%	22	-22
Burundi	11	1	9%	9	-8
Cabo Verde	8	0	0%	7	-7
Cambodia	46	1	2%	22	-21
Cameroon	42	1	2%	21	-20

Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
Canada	146	15	10%	32	-17
Central African Republic	3	0	0%	3	-3
Chad	10	0	0%	8	-8
Chile	62	8	13%	25	-17
China	1062	3	0%	39	-36
China Hong Kong SAR	15	0	0%	11	-11
China Macao SAR	9	1	11%	7	-6
Colombia	282	33	12%	36	-3
Comoros	1	0	0%	1	-1
Congo	2	0	0%	2	-2
Costa Rica	25	2	8%	16	-14
Côte d'Ivoire	105	1	1%	29	-28
Croatia	38	3	8%	20	-17
Cuba	48	0	0%	22	-22
Cyprus	36	3	8%	19	-16
Czechia	46	2	4%	22	-20
Democratic Republic of the Congo	91	6	7%	28	-22
Denmark	34	1	3%	19	-18
Djibouti	1	0	0%	1	-1
Dominican Republic	41	4	10%	20	-16
Ecuador	57	7	12%	24	-17
Egypt	56	3	5%	24	-21
El Salvador	32	6	19%	18	-12
Equatorial Guinea	1	0	0%	1	-1
Eritrea	7	0	0%	6	-6
Estonia	10	0	0%	8	-8
Eswatini	2	0	0%	2	-2
Ethiopia	69	2	3%	26	-24
Fiji	5	0	0%	4	-4
Finland	35	12	34%	19	-7

Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
France	559	15	3%	38	-23
Gabon	17	0	0%	12	-12
Gambia	1	0	0%	1	-1
Georgia	48	16	33%	22	-6
Germany	359	37	10%	37	0
Ghana	76	1	1%	27	-26
Greece	26	8	31%	16	-8
Grenada	1	0	0%	1	-1
Guatemala	60	0	0%	24	-24
Guinea	39	0	0%	20	-20
Guinea-Bissau	7	0	0%	6	-6
Guyana	7	0	0%	6	-6
Haiti	95	1	1%	29	-28
Holy See	19	0	0%	13	-13
Honduras	19	3	16%	13	-10
Hungary	39	0	0%	20	-20
Iceland	7	0	0%	6	-6
India	818	16	2%	39	-23
Indonesia	1257	1	0%	40	-39
Iran (Islamic Republic of)	450	0	0%	38	-38
Iraq	94	19	20%	29	-10
Ireland	48	2	4%	22	-20
Israel	58	1	2%	24	-23
Italy	100	6	6%	29	-23
Jamaica	14	0	0%	10	-10
Japan	765	3	0%	39	-36
Jordan	31	6	19%	18	-12
Kazakhstan	112	3	3%	30	-27
Kenya	51	1	2%	23	-22
Korea (Democratic People's Republic of)	72	0	0%	26	-26

Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
Korea (Republic of)	248	1	0%	35	-34
Kuwait	12	0	0%	9	-9
Kyrgyzstan	28	2	7%	17	-15
Lao People's Democratic Republic	16	0	0%	12	-12
Latvia	26	0	0%	16	-16
Lebanon	37	5	14%	19	-14
Lesotho	3	0	0%	3	-3
Liberia	8	1	13%	7	-6
Libya	16	4	25%	12	-8
Liechtenstein	2	0	0%	2	-2
Lithuania	18	9	50%	13	-4
Luxembourg	1	0	0%	1	-1
Madagascar	56	2	4%	24	-22
Malawi	20	0	0%	13	-13
Malaysia	82	1	1%	27	-26
Maldives	9	0	0%	7	-7
Mali	23	0	0%	15	-15
Malta	5	0	0%	4	-4
Mauritania	6	1	17%	5	-4
Mauritius	7	0	0%	6	-6
Mexico	1661	81	5%	40	41
Moldova	25	2	8%	16	-14
Monaco	2	0	0%	2	-2
Mongolia	54	1	2%	23	-22
Montenegro	8	0	0%	7	-7
Morocco	157	5	3%	32	-27
Mozambique	40	1	3%	20	-19
Myanmar	99	1	1%	29	-28
Namibia	4	0	0%	4	-4
Nepal	12	0	0%	9	-9

Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
Netherlands	70	5	7%	26	-21
New Zealand	29	0	0%	17	-17
Nicaragua	53	3	6%	23	-20
Niger	11	0	0%	9	-9
Nigeria	127	16	13%	31	-15
North Macedonia (Republic of)	21	1	5%	14	-13
Norway	32	0	0%	18	-18
Oman	52	8	15%	23	-15
Pakistan	160	3	2%	33	-30
Palestine	29	3	10%	17	-14
Panama	27	1	4%	16	-15
Papua New Guinea	5	0	0%	4	-4
Paraguay	83	2	2%	27	-25
Peru	97	8	8%	29	-21
Philippines	1334	10	1%	40	-30
Poland	349	4	1%	37	-33
Portugal	89	17	19%	28	-11
Qatar	4	3	75%	4	-1
Romania	76	6	8%	27	-21
Russian Federation	603	3	1%	38	-35
Rwanda	12	0	0%	9	-9
Samoa	2	0	0%	2	-2
San Marino	1	0	0%	1	-1
Sao Tome and Principe	1	0	0%	1	-1
Saudi Arabia	71	1	1%	26	-25
Senegal	72	0	0%	26	-26
Serbia	15	1	7%	11	-10
Seychelles	1	0	0%	1	-1
Sierra Leone	3	0	0%	3	-3
Singapore	9	0	0%	7	-7



Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
Slovakia	32	5	16%	18	-13
Slovenia	42	9	21%	21	-12
Solomon Islands	3	0	0%	3	-3
Somalia	42	2	5%	21	-19
South Africa	50	1	2%	23	-22
South Sudan	5	0	0%	4	-4
Spain	112	12	11%	30	-18
Sri Lanka	27	2	7%	16	-14
Sudan	82	0	0%	27	-27
Suriname	3	0	0%	3	-3
Sweden	44	6	14%	21	-15
Switzerland	34	3	9%	19	-16
Syrian Arab Republic	32	0	0%	18	-18
Taiwan, province of China	145	0	0%	32	-32
Tajikistan	20	0	0%	13	-13
Tanzania	45	1	2%	21	-20
Thailand	146	6	4%	32	-26
Timor-Leste	10	0	0%	8	-8
Togo	21	0	0%	14	-14
Tonga	1	0	0%	1	-1
Trinidad and Tobago	6	0	0%	5	-5
Tunisia	42	4	10%	21	-17
Türkiye	175	6	3%	33	-27
Turkmenistan	18	1	6%	13	-12
Uganda	40	1	3%	20	-19
Ukraine	297	18	6%	36	-18
United Arab Emirates	53	2	4%	23	-21
United Kingdom	246	4	2%	35	-31
United States of America	2233	28	1%	40	-12
Uruguay	16	4	25%	12	-8
Uzbekistan	76	0	0%	27	-27

Country	Number of HEIs in WHED	Number of institutions replying (N)	Percentage of HEIs replying	Number of institutions needed to reply for statistical relevance (NSR)	N-NSR
Venezuela (Bolivarian Republic of)	122	1	1%	31	-30
Viet Nam	173	1	1%	33	-32
Yemen	16	2	13%	12	-10
Zambia	45	0	0%	21	-21
Zimbabwe	13	4	31%	10	-6

# Annex 6

## 6<sup>th</sup> IAU Global Survey Replies according to language

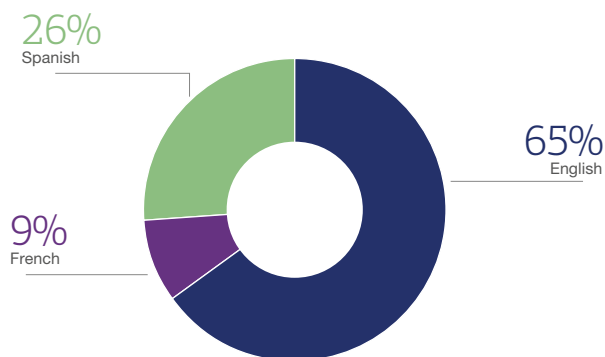
The 6<sup>th</sup> IAU Global Survey on internationalization was an online survey available in three languages: English, French and Spanish.

The survey gathered replies from 722 HEIs around the world.

The overall distribution of HEIs by language is as follows:

Language	Replies	Percentage
English	470	65%
French	63	9%
Spanish	189	26%

Distribution of HEIs by language of completion

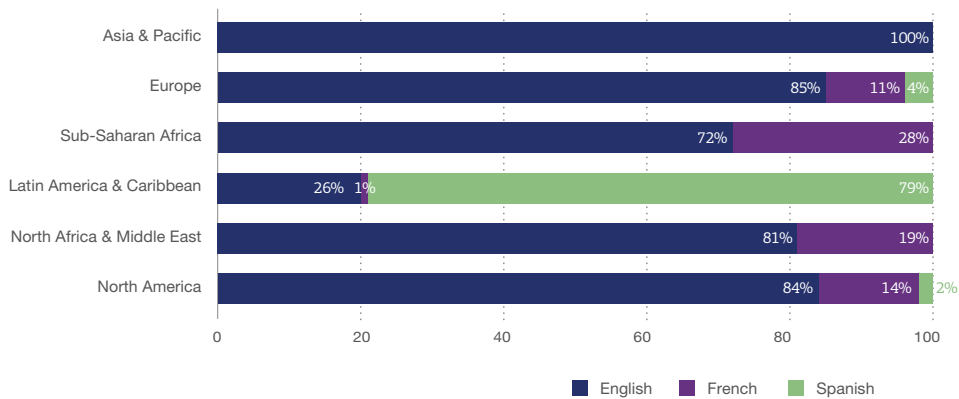


The distribution of HEIs according to the language in the different regions of the world is not uniform, but clearly follows well-defined patterns. The distribution is reported in the figure below.

In Asia & Pacific all HEIs replied in English. In all other regions of the world, there are HEIs that replied in English and in French (although only one in Latin America & the Caribbean), while only HEIs from Latin America & the Caribbean, Europe and just one HEI from North America replied in Spanish. However, in Latin America & the Caribbean 79% of HEIs replied in Spanish.

The language distribution is not surprising and mirrors quite closely the distribution of official languages in the respective countries.

## Language of completion: distribution by region



For instance:

- Out of the 11 HEIs that replied in Spanish in Europe, 10 are from Spain, and only one from France, which is not a Spanish-speaking country.
- Out of the 31 HEIs that replied in French in Europe, 13 are from France, 15 from Belgium, two from Switzerland, and only one from Romania, which is not a French-speaking country.
- Out of the 12 HEIs that replied in French in Sub-Saharan Africa, six are from the Democratic Republic of the Congo, two from Madagascar, one from Burundi, Cameroon and Côte D'Ivoire, and only one from Uganda, which is not a French-speaking country.
- Similarly, out of the 13 HEIs that replied in French in North Africa & the Middle East, four are from Morocco, four are from Tunisia, two from Algeria, one from Lebanon, and only one from Mauritania and Egypt, which are not French-speaking countries.

## Detail of language distribution in each region

### 1) Asia & Pacific

In the Asia & Pacific region, all 62 HEIs that participated in the survey from this region replied in English, including those institutions from countries with a French colonial past such as Cambodia and Vietnam.

Comparing the distribution of HEIs in the 5<sup>th</sup> Global Survey (83% English, 17% French) to the current edition (100% English), a notable shift in language preference is apparent. This change reflects the evolving linguistic landscape in the region and signifies a broader trend of English language adoption among HEIs. Unlike countries in the Middle and North Africa, and Sub-Saharan Africa, with a French colonial past, the language division in this region is less pronounced. Even though only one institution from Cambodia and one from Vietnam responded to the survey, both opted for English as their preferred language of communication, aligning with the global trend.

## **2) Europe**

As mentioned earlier, the majority of HEIs that replied in Spanish are from Spain, with only one French institution opting to reply in Spanish. On the other hand, most HEIs that responded in French are from French-speaking countries such as Belgium (French-speaking Belgium), France, and the French-speaking regions of Switzerland. Only one institution from Romania, a non-French-speaking country, but with a tradition of affinity for French language, replied in French.

The language distribution in European countries is not exclusive. In the aforementioned countries, some HEIs replied in English, French, or even Spanish.

Comparing the 5<sup>th</sup> Global Survey, where a significant percentage (39%) of French replies came from non-French-speaking countries to the present edition, there is a notable shift. Only one institution from Romania, a non-French speaking country, replied in French.

These results highlight the knowledge and usage of English by European HEIs, regardless of their official languages.

## **3) Sub-Saharan Africa**

The language distribution in the Sub-Saharan Africa region aligns with the official languages of the respective countries. HEIs from countries where neither English nor French is the official language (Angola, Ethiopia, Mozambique and Somalia) predominantly replied in English. Conversely, HEIs in English-speaking countries primarily responded in English, with the exception of one institution from Uganda that replied in French. Similarly, HEIs from French-speaking countries (Democratic Republic of the Congo, Madagascar, Burundi, Cameroon, Côte d'Ivoire) all replied in French.

These results highlight the correlation between the official languages of the countries and the language chosen for survey responses, demonstrating a clear-cut language distribution among HEIs in the region.

## **4) Latin America & the Caribbean**

In Latin America & the Caribbean region, 79% of HEIs replied in Spanish, 20% in English, and only one HEI replied in French, from Haiti, which is a French-speaking country.

As expected, the majority of HEIs that responded in English were from non-Spanish-speaking countries, primarily Brazil. However, there were also a few HEIs from Spanish-speaking countries, including Peru, Mexico, Colombia, El Salvador, and Chile, that chose to reply in English. Notably, among the Brazilian institutions, 11 responded in English, while six opted for Spanish.

Overall, these results confirm the anticipated language distribution, emphasising the prevalence of Spanish responses. Furthermore, they highlight the significant usage of English in non-Spanish-speaking countries but also the usage of Spanish in Brazil.

### **5) North Africa & the Middle East**

Not surprisingly, 81% of HEIs in North Africa & the Middle East responded in English. Among the 13 HEIs that replied in French, 12 are from countries with a French colonial past (Morocco, Tunisia, Algeria, Lebanon, and Mauritania), while only one institution is from Egypt, which has no specific relationship or historical background with the French language.

### **6) North America**

As anticipated, among the 43 responses received in North America, seven were not in English. Of these, six responses were in French and originated from institutions based in Quebec, Canada. The remaining non-English response was in Spanish and came from an institution located in Puerto Rico (United States).

## **Comparison with the results of the 5<sup>th</sup> Global Survey**

The 5<sup>th</sup> IAU Global Survey was conducted in the same three languages, but the distribution of HEIs by language of reply was different. In the 5<sup>th</sup> edition, 54% of HEIs replied in English, 26% in Spanish, and 20% in French. However, in the 6<sup>th</sup> edition, there has been a slight increase in the percentage of HEIs replying in English (65%), while the percentage of HEIs replying in Spanish remained exactly the same at 26%. Notably, the percentage of HEIs replying in French significantly decreased to 9%.

Despite the change in percentages, the 6<sup>th</sup> edition experienced an absolute decrease in HEIs replies across all three languages, with -16 in English, -51 in Spanish, and -118 in French. This decline resulted in an overall decrease in the total number of replies compared to the 5<sup>th</sup> edition (from 907 to 722).

The decrease in the number of HEIs replying in French is consistent with the overall decrease in replies across all regions, particularly in non-French-speaking countries, where only few French replies were received in the 6<sup>th</sup> edition. The decline in French replies can also be attributed to decreases from countries such as France, Lebanon, and several French-speaking African countries.

In contrast, the number of HEIs replying in Spanish remained stable between the 5<sup>th</sup> and 6<sup>th</sup> editions, thanks to consistent responses from Spanish-speaking countries, particularly in Latin America & the Caribbean region.

## **Conclusion**

The availability of Spanish as an option consistently facilitates higher responses from Spanish-speaking HEIs, highlighting its importance in increasing participation. However, the impact of French was limited in the 6<sup>th</sup> edition compared to its role in the 5<sup>th</sup> edition.

The decrease in the number of replies received in French can be attributed to two factors, an overall decrease in the number of replies from Francophone countries and a shift of language

in some non-Francophone countries (from replying in French in the 5<sup>th</sup> edition to replying in English in the 6<sup>th</sup>).

The varying effectiveness of language options emphasises the need for careful consideration to optimise participation.

# Annex 7

## Definitions for inclusion in 6<sup>th</sup> IAU Global Survey questionnaire

Term	Definition
Articulation program	A collaborative agreement between two HEIs in which students take the first part of their program at home and the second part abroad (3+1, 2+2, etc.).
Brain drain	Brain drain – the term is generally used to describe the association between the migration of higher skilled workers (e.g.: scientists, teachers, engineers, doctors) from poorer to richer countries, and the consequent erosion of local capacities in the sending regions.  Levatino, A., & Pécoud, A. (2012). Overcoming the Ethical Dilemmas of Skilled Migration? An Analysis of International Narratives on the “Brain Drain”. <i>American Behavioral Scientist</i> , 56, 1258 - 1276.
Credit seeking international students	Credit seeking international students are international mobile students (see definition below) who are studying abroad for credits (not a full degree).
Collaborative Online International Learning (COIL)	Collaborative Online International Learning (COIL) is an approach that brings students and professors together across cultures to learn, discuss and collaborate as part of their class. Professors partner to design the experience, and students partner to complete the activities designed. COIL becomes part of the class, enabling all students to have a significant intercultural experience within their course of study. (SUNY definition: <a href="https://online.suny.edu/introtocoil/suny-coil-what-is/">https://online.suny.edu/introtocoil/suny-coil-what-is/</a> )
Degree seeking international students	Degree seeking international students are international mobile students (see definition below) who are studying abroad for a full degree (Bachelor, Master or PhD).
Dual/double or multiple degree programme	A dual/double or multiple degree programme is developed collaboratively by two or more partner HEIs; graduates are awarded qualifications at equivalent level by all HEIs involved.
Franchise programme	The foreign sending HEI/provider has primary responsibility for the design, delivery and academic oversight of academic programmes offered in host country. Qualification is awarded by foreign sending HEI. (Knight 2017).
Full time equivalent enrolment	FTE is often used as a standardizing measure of student enrolment to take account of both full time and part time students. One FTE is normally equivalent to one full time student or two half time students. It is traditionally based on standard course load for students.
Global Classroom	The Global Classroom is described as a model of collaborative learning supported by virtual platforms which seeks to address global challenges 'by having students study local problems and then engage with international peers to develop a richer understanding of how global problems manifest differently (and similarly) in other local contexts. [...] The Global Classroom project pursues the goals of international education as a hybrid course that takes advantage of new media, technology, and learning theory. In addition, students gain first-hand experience with cutting-edge tools in video communication, online course environments, and online project presentation.' (Wiek, et al., 2013, p. 25)  Wiek, A., Bernstein, M.J., Laubichler, M.D., Caniglia, G., Minter, B.A., & Lang, D.J. (2013). A Global Classroom for International Sustainability Education. <i>Creative Education</i> , 04, 19-28.



Term	Definition
International branch campus	An entity that is owned, at least in part, by a foreign higher education provider; operated in the name of the foreign education provider; and provides an entire academic programme, substantially on site, leading to a degree awarded by the foreign education provider. (C-BERT definition).
Internationalization at home	Internationalization at home is a term referring to “the purposeful integration of international and intercultural dimensions into the formal and informal curriculum for all students within domestic learning environments” (Beelen and Jones 2015).
Internationalization of the curriculum	Internationalization of the curriculum is a term referring to: “the incorporation of international, intercultural and global dimensions into the content of the curriculum as well as the learning outcomes, assessment tasks, teaching methods and support services of a program of study”. (Leask, 2015).
International mobile students	<p>Internationally mobile students are individuals who have physically crossed an international border between two countries with the objective to participate in educational activities in the country of destination, where the country of destination of a given student is different from their country of origin.</p> <p>The country of origin of a tertiary student is the country in which they gained their upper secondary qualifications. This can also be referred to as the country of prior education. Where countries are unable to operationalise this definition, it is recommended that they use the country of usual or permanent residence to determine the country of origin. Where this too is not possible and no other suitable measure exists, the country of citizenship may be used – but only as a last resort.</p> <p>(UNESCO Institute for Statistics, 2015)</p> <p>They can be degree seeking international students or credit-seeking international students (see respective definitions of terms).</p>
Joint Degree Programme	A joint degree programme is developed collaboratively by two or more partner HEIs; graduates are awarded one joint qualification.
Joint University	A HEI co-organised and co-founded by both a domestic and a foreign HEI/ provider collaborating on academic programmes. Qualifications can be awarded by either or both domestic and foreign country HEIs.
Learning outcomes	Learning outcomes are the knowledge, skills and abilities that a student is expected to obtain as a result of a particular educational experience.
Transnational education (TNE)	The mobility of education programs and institutions/providers across international borders. (Knight 2017).
Virtual exchange	‘Virtual Exchange’ refers to the application of online communication tools to bring together classes of learners in geographically distant locations with the aim of developing their foreign language skills, digital competence and intercultural competence through online collaborative tasks and project work. In recent years approaches to Virtual Exchange have evolved in different contexts and different areas of university education and these approaches have had, at times, very diverse organisational structures and pedagogical objectives. (O’Dowd, 2017).
Virtual Internationalization	Virtual Internationalization at the national, sector, and institutional levels is defined as the process of introducing an international, intercultural, or global dimension into the delivery, purpose or functions of higher education with the help of information and communications technology (ICT). (Bruhn, E. (2020) Virtual Internationalization in Higher Education. pp.50)

# Annex 8

## 6<sup>th</sup> IAU Global Survey on internationalization of higher education institutional questionnaire

The International Association of Universities (IAU) and partners are pleased to launch the sixth edition of the Global Survey on Internationalization of Higher Education.

The Global Survey is conducted by IAU thanks to the support of sponsoring partners:

- Agence Universitaire de la Francophonie (AUF)
- Association of Commonwealth Universities (ACU)
- Council of Europe (CoE)
- German Rectors' Conference (HRK)
- NAFSA: Association of International Educators
- Qatar Foundation (QF)
- UNIMED - Mediterranean Universities Union
- Unión de Universidades de América Latina y el Caribe (UDUAL)



and in partnership with:

- Academy for research and higher education (ARES), Belgium
- Association of African Universities (AAU)
- Center for International Higher Education (CIHE) - Boston College
- Erasmus Student Network (ESN)
- European University Association (EUA)
- German Centre for Higher Education Research and Science Studies (DZHW)
- Global Student Forum (GSF)
- Inter-American Organization for Higher Education (OUI-IOHE)
- National Interuniversity Council of Argentina (CIN)
- Ontario Institute for Studies in Education (OISE) - University of Toronto

### For the purpose of this questionnaire:

"Internationalization of higher education is defined as the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society." (De Wit, H., Hunter F., Howard L.,

Egron-Polak E. (Eds.) (2015) "Internationalization of Higher Education", European Parliament, Brussels: EU)

### Instructions:

- Please note that the invitation to participate in the survey may reach several persons within each institution. However, we need only one comprehensive answer per institution, which represents the perspective of the entire institution. Therefore, we kindly invite you to coordinate internally before replying to the survey.
- We advise you to consult with your colleagues to gather the necessary information before replying to the online questionnaire. You can use this questionnaire in PDF format in order to collect all the necessary data prior to completing the online questionnaire.
- To support you in your responses, we have prepared a compilation of [definitions of terms](#) used in the questionnaire.

The survey is composed of the following sections:

Institutional Information and Profile

- A) Importance, benefits and challenges to internationalization
  - B) Internationalization governance
  - C) Internationalization of teaching and learning: activities
  - D) Internationalization of teaching and learning: Internationalization of the curriculum at home
  - E) Internationalization of research
  - F) Internationalization and societal/community engagement
  - G) Emerging Issues and the Future of Internationalization
- Contact details

## Institutional Information and Profile

### 1. Terms of data use:

(please tick the box to agree, otherwise you will not be able to complete the survey)

- I agree that IAU may use the data provided in my answers for research, presentations and publications. The data will not be shared with any third parties beyond the partners listed in the introduction, nor be sold. It may appear in aggregated form or as examples as part of the data analysis, but treated anonymously. The names and emails provided by respondents will not be part of the analysis and will only be used in order to communicate the results of the survey.

### 2. Name of Institution:

(Short text box open answer in the online version)

### 3. OPTIONAL: What is the unique WHED identification number of your higher education institution?

Please find [here your WHED ID](#) e.g. IAU-00001

### 4. Country:

(Drop down list in the online version)

**5. What levels of qualification are offered at your institution?**(Please select all that apply)

- Bachelor (1<sup>st</sup> cycle) or equivalent level (ISCED 6)
- Master (2<sup>nd</sup> cycle) or equivalent level (ISCED 7)
- Doctorate (3<sup>rd</sup> cycle) or equivalent level (ISCED 8)

**6. Which of the following types best describes your institution?**(Please select only one)

- Public
- Private not for profit
- Private for profit

**7. What was the total student enrolment in the academic year that started in 2021? Please report the full time equivalent (FTE) enrolment of all degree seeking students (both domestic and international) who enrolled in 2021 (1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> cycles combined)**(Please select only one):

- Less than 1 000
- 1 001 to 5 000
- 5 001 to 10 000
- 10 001 to 20 000
- 20 001 to 50 000
- More than 50 000

**8. What is the language most commonly used as a medium of instruction at your institution?**

(Short text box open answer in the online version)

**A) Importance, benefits and challenges to internationalization****9. What level of importance does internationalization have for the leadership of your institution?**(Please select only one)

- High
- Medium
- Low
- Not important

**10. How has the level of importance of internationalization changed over the last five years for the leadership of your institution?**(Please select only one)

- Substantially decreased
- Decreased
- Stayed the same
- Increased
- Substantially increased

**11. If the level of importance of internationalization has increased for the leadership of your institution, please select the factors/reasons/etc. most responsible for this change:**

(Please reply to this question only if you replied that the level of importance has increased or substantially increased and select a maximum of three)

- Increased demand and/or support by government or governmental organisations (national, regional, etc.) to focus on internationalization
- Increased interest/demand by students at our institution
- Increased interest/demand by academic staff at our institution
- Increased interest/demand by administrative staff at our institution
- Increased need for income generation through internationalization
- Increased need to strategically connect with other HEIs globally
- Requirement for international accreditation
- Requirement from international rankings
- Shift of priorities at institutional level
- Other (please specify):

**12. If the level of importance of internationalization has decreased for the leadership of your institution, please select the factors/reasons/etc. most responsible for this change:**

(Please reply to this question only if you replied that the level of importance has decreased or substantially decreased and select a maximum of three)

- Budget restrictions
- COVID-19 pandemic
- Geopolitical dynamics
- Increased nationalist policies
- Shift of priorities at institutional level
- Diminished interest/demand by academic staff at our institution
- Diminished interest/demand by administrative staff at our institution
- Diminished interest/demand by students at our institution
- Other (please specify): .....

**13. What is the importance of the following key internal drivers of internationalization at your institution?**

(Please select only one per row)

	Very important	Important	Somewhat important	Not important
Head of Institution (President/Rector/Vice Chancellor)				
Deputy Head of Institution (Vice-President/Vice-Rector/Deputy Vice-Chancellor/Chief Academic Officer/Provost)				
Deans				
Academic Department Heads				
Heads of research laboratories				
International Office (at central/institutional level)				

	Very important	Important	Somewhat important	Not important
Academic staff (teachers and researchers)				
Administrative staff				
Student unions/student organisations				
Individual students				

**14. What is the importance of the following key external drivers of internationalization at your institution?**

(Please select only one per row)

	Very important	Important	Somewhat important	Not important
Business and industry demand				
Demand from foreign higher education institutions				
Demographic trends				
Global policies/agendas (including UN Agenda 2030)				
Government policy (national/state/province/municipal)				
National and international rankings				
Need to generate revenue				
Need to find solutions for global challenges				
Regional policies (for instance, EU, ASEAN, OAS)				
Societal expectations				

**15. What are the most significant potential benefits of internationalization for your institution?**

(Please select a maximum of three options)

- Enhanced international cooperation and capacity building
- Enhanced internationalization of the curriculum at home
- Enhanced prestige/profile for the institution
- Improved graduate employability
- Improved quality of teaching and learning
- Improved quality of research
- Increased global, international and intercultural knowledge, skills and competences for both students and staff
- Increased international networking by professors and researchers
- Increased/diversified revenue generation
- Opportunity to benchmark/compare institutional performance within the context of international good practice

- Possibility to continue specific study programmes, which would otherwise be endangered due to under-enrolment of domestic students
- Other (please specify): .....

**16. What are the most significant potential risks of internationalization for your institution?**

(Please select a maximum of three options)

- Difficulty to combine/integrate it with other institutional priorities (e.g. diversity, equity and inclusion and sustainable development)
- Difficulty to assess/recognize quality of courses/programmes offered by foreign institutions
- Excessive competition with other higher education institutions
- Homogenization of curriculum
- Increased workload for academic and administrative staff
- Increased xenophobia/racism on campus
- Limited inclusivity - international opportunities accessible only to students from more privileged backgrounds (socio-economic background, ethnicity, higher education family background, health and disabilities, etc.)
- Loss of students to other countries
- Loss of academic and administrative staff to other countries
- Overuse of English as a medium of instruction
- Pursuit of international partnerships/policies only for reasons of prestige
- Reputational risk derived from our institution's activity in transnational education (TNE)
- Security-related risks (copyright, intellectual property rights, illegal transfer of research data or research accomplishments, dual use of research outcomes, etc.)
- Too much focus on recruitment of fee paying international students
- Unequal sharing of benefits of internationalization amongst partners
- Other (please specify): .....

**17. In your country, what are the most significant potential societal risks associated with current trends in internationalization of higher education?**

(Please select a maximum of three options)

- Brain drain
- COVID-19 pandemic and related consequences
- Commodification and commercialization of education
- Decreased academic autonomy due to government regulations
- Dominance of a 'western' epistemological approach
- Ecological footprint of student and staff mobility
- Growing development gaps between our country/region and others
- Growing gaps (e.g. quality/prestige/institutional capacity) between higher education institutions within our country
- Increased anti-globalization sentiments
- Increase in number of foreign 'degree mills' and/or low quality providers
- Increased xenophobia/racism in society
- Loss of cultural identity
- Loss of linguistic diversity
- Security-related risks
- Unequal sharing of benefits of internationalization amongst countries
- Other (please specify): .....

**18. What are the most important internal obstacles or challenges to advancing internationalization at your institution?**

(Please select a maximum of three options)

- Limited institutional leadership/vision
- No strategy/plan to guide the process
- Competing priorities at institutional level
- Insufficient financial resources
- Insufficient international opportunities to meet stakeholder interest/demand
- Administrative/bureaucratic difficulties (e.g. credit transfer limitations; different academic years)
- Lack of or poorly resourced organizational structure/office responsible for internationalization
- International engagement is not recognized for promotion or tenure
- Lack of knowledge of foreign languages by students
- Lack of knowledge of foreign languages by academic staff
- Lack of knowledge of foreign languages by administrative staff
- Limited involvement/interest of academic staff (teachers and researchers)
- Limited capacity/expertise of academic staff (teachers and researchers)
- Limited involvement/interest of administrative staff
- Limited capacity/expertise of administrative staff
- Limited student interest
- Limited student participation due to constraints (including financial ones)
- Limited/lack of technological resources to engage in virtual internationalization opportunities
- Too rigorous/inflexible curriculum to participate in international activities, including student mobility.
- Other (please specify): .....

**19. What are the most important external obstacles or challenges to advancing internationalization at your institution?**

(Please select a maximum of three options)

- Anti-immigration and increasingly nationalist policies
- Difficulties of recognition and equivalences of qualifications, study programs and course credits at regional/national level
- Geopolitical dynamics
- Foreign institutions are not interested in partnering with our institution
- Internationalization of higher education is not a policy priority for our government(s)
- Lack of local internship and future employment opportunities for international students (e.g. due to lack of capacity and/or willingness by the business sector to hire and retain international talent)
- Language barriers
- Limited funding to support internationalization efforts/to promote our institution internationally
- Negative perceptions of the situation in our country (political, economic, security aspects, etc.)
- Visa restrictions imposed by our country on foreign students, researchers and academics
- Visa restrictions imposed on our students, researchers and academics by other countries
- Other (please specify): .....



## B) Internationalization governance

### 20. Does your institution have a formal policy, strategy or plan for internationalization?

(Please select one)

- No
- Not yet, but it is in preparation
- Yes, as an explicit section of the overall institutional strategy
- Yes, as a stand-alone document
- Yes, internationalization is embedded in the overall institutional strategy (no designated internationalization chapter, nor separate internationalization strategy, but internationalization objectives are fully integrated in the overall institutional strategy)

Note: Only if you choose one of the three “Yes” options in Q20 you have to reply to Q21 and the following ones. If you reply “No” or “Not yet” you will skip to Q24.

### 21. If a formal policy, strategy or plan for internationalization has been elaborated, what is its current status?

(Please select one)

- It has been recently revised or issued
- It is currently under revision
- It is soon to be revised
- No revision or changes have been recently done nor are previewed in the near future

Note: If you reply that no revision or changes are intended in Q21 you will skip Q22.

### 22. Is this revision mainly due to the COVID-19 crisis?

(Please select one)

- Yes, definitely
- Yes, to a large extent
- Yes, but only to some extent
- No

### 23. Please answer the following questions related to your institution's internationalization policy/strategy/plan and activities

(Please select only one per row)

Description of the policy/strategy/plan	Yes	No
Is the policy/strategy/plan institution-wide?	<input type="checkbox"/>	<input type="checkbox"/>
Do faculties/schools/departments in your institution have their own internationalization policies/strategies/plans?	<input type="checkbox"/>	<input type="checkbox"/>
Are targets and benchmarks to be reached defined in the policy/strategy/plan?	<input type="checkbox"/>	<input type="checkbox"/>
Is there an office/team to oversee the implementation of the policy/strategy/plan?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a monitoring and evaluation framework to assess progress?	<input type="checkbox"/>	<input type="checkbox"/>

Description of the policy/strategy/plan	Yes	No
Is there a specific budgetary provision for implementation?	<input type="checkbox"/>	<input type="checkbox"/>
Is an international dimension included in other institutional policies/strategies/plans?	<input type="checkbox"/>	<input type="checkbox"/>
Are students (student organisations and/or student representatives) involved in the design, evaluation and implementation of the policy/strategy/plan?	<input type="checkbox"/>	<input type="checkbox"/>
Is the policy/strategy/plan in line with the national internationalization strategy (if one exists)?	<input type="checkbox"/>	<input type="checkbox"/>

**24. Does your institution have specific geographic priorities for internationalization?**

- Yes  
 No

**25. If yes, what is the level of priority of the following regions for your institution?**

(Please select only one per row)

	Very important	Important	Somewhat important	Not important
Asia and Pacific				
Europe				
North America				
Latin America and Caribbean				
North Africa and the Middle East				
Sub-Saharan Africa				

**26. What is the importance of the following funding sources for international activities at your institution?**

(Please select only one per row)

	Very important	Important	Somewhat important	Not important
General institutional budget				
International student fees				
Other institutional international activities (e.g. TNE)				
Our own government (national/federal/state/local)				
Private donors (charities, foundations, etc.)				
Private businesses				

	Very important	Important	Somewhat important	Not important
Foreign governments (bilateral cooperation and aid and development)				
International organizations (World Bank, European Union, ASEAN, etc.)				

**27. Do the recruitment and/or promotion policies for academic staff at your institution include prior international experience as a requirement?**

(Please select only one)

- Yes,
- Partly, it depends on the position
- No, but it is seen as desirable/an asset
- No

**28. Do the recruitment and/or promotion policies for administrative staff at your institution include prior international experience as a requirement?**

(Please select only one)

- Yes,
- Partly, it depends on the position
- No, but it is seen as desirable/an asset
- No

**29. Do the recruitment and promotion policies related to academic staff at your institution take into consideration foreign language skills?**

(Please select only one)

- Yes, knowledge of at least one foreign language is required
- Partly, knowledge of at least one foreign language is usually required
- Partly, knowledge of at least one foreign language is desirable/an asset
- No, there are no foreign language requirements in recruitment and promotion policies

**30. Do the recruitment and promotion policies related to administrative staff at your institution take into consideration foreign language skills?**

(Please select only one)

- Yes, knowledge of at least one foreign language is required
- Partly, knowledge of at least one foreign language is usually required
- Partly, knowledge of at least one foreign language is desirable/an asset
- No, there are no foreign language requirements in recruitment and promotion policies

**31. Of the internationalization activities that are undertaken at your institution, which ones are given the highest priority?**

(Please select a maximum of three)

- Strengthening international/intercultural content of curriculum and/or co-curriculum
- Incoming degree-seeking student mobility (recruitment of international students)

- Incoming credit-seeking student mobility (student exchanges)
- Outgoing credit-seeking student mobility (student exchanges)
- Virtual internationalization opportunities for students (COIL, virtual exchanges, etc.)
- Recruiting foreign academic and administrative staff
- Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)
- Outgoing mobility opportunities for academic and administrative staff
- Developing joint and/or double/dual and multiple degree programs with foreign partner institutions
- Transnational education (TNE) provision (academic courses/programmes abroad, branch campuses, overseas joint venture, franchises)
- International research collaboration and outputs (e.g international co-publications)
- International development and capacity building projects
- Other (please specify): .....

**32. How has the importance of the following internationalization activities changed in the last five years?**

(Please select only one per row)

	Increased	Stayed the same	Decreased	Not applicable
International development and capacity building projects				
International research collaboration and outputs (e.g international co-publications)				
Bi- or multilateral international student exchanges				
Outgoing mobility opportunities/learning experiences for students (study abroad, international internships and placements, etc.)				
Outgoing mobility opportunities for academic and administrative staff				
Recruiting foreign academic and administrative staff				
Incoming mobility opportunities for academic and administrative staff (e.g. visiting professors, secondments, etc.)				
Short term programmes/summer schools				
Marketing and promoting our institution internationally				
International Alumni activities				
Participation in international events				
Participation in international associations				

**33. How has the number of your institution's international partnerships changed over the last 5 years?**

(Please select only one)

- Decreased
- Stayed the same
- Increased

Note: If you reply in Q33 “stayed the same” you will skip Q34

**34. Do you think that these changes are mainly a result of the COVID-19 crisis?**

(Please select only one)

- Yes, definitely
- Yes, to a large extent
- Yes, but only to some extent
- No

**C) Internationalization of teaching and learning: activities**

**35. Does your institution offer collaborative degree programmes with international partners?**

- Yes
- No

Note: If you reply “No” in Q35 you will skip Q36, Q37 and Q38 and go directly to Q39.

**36. If yes, how has the number of collaborative degree programmes changed in the last five years?**

(Please select only one per row)

	Decreased	Stayed the same	Increased	Not applicable
Joint degree programmes with international partners				
Dual/double and multiple degree programmes with international partners				

**37. Has the introduction or increase of online collaboration impacted on joint degree programmes or dual/double and multiple degrees at your institution?**

- Yes
- No

**38. If yes, how has the increase in online collaboration impacted on joint degree programmes or dual/double and multiple degrees?**

(Please select all that apply)

- It has led to the inclusion of a new online component to existing joint degree programmes with international partners

- It has led to the inclusion of a new online component to existing dual/double and multiple degree programmes with international partners
- It has led to the creation of new joint degree programmes with international partners that include an online component
- It has led to the creation of new dual/double and multiple programmes with international partners that include an online component
- It has led to the creation of new completely online joint degree programmes with international partners
- It has led to the creation of new completely online dual/double and multiple programmes with international partners
- It has necessitated new investments in equipment and/or staff training
- It has affected student evaluations of these programmes
- It has presented challenges for academic staff to adopt new teaching methods.
- It has presented challenges for administrative staff to adopt new processes and procedures
- Other (please specify): .....

**39. Is your institution involved in transnational education (TNE)?**

- Yes
- No

Note: If you reply “No” in Q39 you will skip Q40 and Q41 and go directly to Q42.

**40. If yes, how has the importance of the following types of transnational education (TNE) changed over the past five years?**  
(Please select only one per row)

Type TNE offered:	Decreased	Stayed the same	Increased	Not applicable
Joint University				
Franchise Programs				
International Branch Campus				
Articulation Programs				

**41. Do you think that these changes are mainly a result of the COVID-19 crisis?**  
(Please select only one)

- Yes, definitely
- Yes, to a large extent
- Yes, but only to some extent
- No

**42. Does your institution engage in virtual internationalization opportunities?**

- Yes
- No

Note: If you reply “No” in Q42 you will skip Q43 and Q44 and go directly to Q45

**43. If yes, how has the importance of the following virtual internationalization opportunities changed over the past five years?**

(Please select only one per row)

Type of virtual internationalization opportunity	Increased	Stayed the same	Decreased	Not applicable
Online preparatory courses (language training, etc.) offered by our institution to students in other countries				
MOOCs offered by our institution to students in other countries				
Online degree programmes offered by our institution to students in other countries				
Collaborative Online International Learning (COIL)				
Virtual exchanges				

**44. Do you think that these changes are mainly a result of the COVID-19 crisis?**

(Please select only one)

- Yes, definitely
- Yes, to a large extent
- Yes, but only to some extent
- No

**D) Internationalization of teaching and learning: Internationalization of the curriculum at home**

**45. How has the importance of internationalization of the curriculum at home (excluding staff and student mobility) changed at your institution over the last five years?**

(Please select only one)

- Substantially increased
- Somewhat increased
- Stayed the same
- Decreased

**46. How has the importance of the following possible ways to internationalize curriculum, changed over the last five years at your institution?**

(Please select one per row)

	Decreased	Stayed the same	Increased	Not applicable
Online activities that develop international perspectives of students at home (e.g. virtual exchange, COIL , online collaborative international projects; virtual international internships, etc.)				
Area studies programmes/courses (e.g. African, Asian, Arabic, North/Latin American, European studies, etc.)				
Assessment of international/intercultural learning outcomes				
Broadening the knowledge base of the curriculum beyond the canon				
Community engagement through, for example, inviting representatives of local cultural and/or linguistically diverse groups to participate in co-curricular activities or service learning projects focused on working with such groups.				
Integrating the experience/expertise of international students to enrich the learning experience				
Integration of international/intercultural dimensions into learning outcomes for courses and programmes				
Integration of international/intercultural dimensions into student assessment activities for courses and programmes				
Leveraging the experience/expertise of international staff to enrich the learning experience				
Professional development for professors to enhance their ability to integrate international/intercultural dimensions into teaching				
Programmes/courses with an international theme (e.g. International Relations, Development Studies, Global Health, etc.)				
Requiring foreign language learning as part of the curriculum of non-language programmes				
Teaching programmes/courses in a non-local language				



**47. Does your institution describe a set of international, intercultural or global learning outcomes or graduate capabilities that all graduates must achieve?**  
(Please select only one)

- Yes, there are international, intercultural or global learning outcomes defined at national level for all HEIs
- Yes, there are international, intercultural or global learning outcomes defined at institutional level.
- Yes, general guidelines are given at the institutional level and intercultural or global learning outcomes are defined at faculty, department or programme level
- No, international/intercultural/global learning outcomes are included at the discretion of defined individual faculties/departments
- No, but they are in development
- No

**48. How has the importance of the following extra-curricular activities changed over the last five years at your institution?**  
(Please select one per row)

	Decreased	Stayed the same	Increased	Not applicable
Allocating special resources (money/ space/staff) for intercultural and globally focused activities				
Buddy or mentor schemes to foster interactions among international and domestic students				
Events that provide inter-cultural/ international experiences on campus or in the local community				
Housing that deliberately mixes international and home students				
Interaction with students in other countries using virtual internationalization				
Intercultural skills-building workshops for staff and students				
Structured programs such as Intercultural Service Learning Projects; Global Leadership Programmes				
Student volunteer work with local immigrant, refugees or cultural minority groups				
Student volunteer work with international development or other service projects				
Support to student led initiatives such as alumni organisations focused on internationalization, international student networks, etc.				

## E) Internationalization of research

### 49. Which of the following best describes your institution?

(Please select only one)

- Teaching only institution (no research conducted at all)
- Predominantly teaching focused
- Focused roughly equally on both teaching and research
- Predominantly research focused

**Institutions which reply “Teaching only institution (no research conducted at all)” to the previous question will skip this section and go to section G.**

### 50. How would you describe the involvement in international research at your institution?

(Please select only one)

- There is very little international research involvement
- Some international research is conducted by individual researchers
- International research tends to be conducted mostly by specific research center(s)
- There are a number of faculty/department-wide international research projects and collaborations
- The institution is involved in a range of disciplinary and/or multidisciplinary international research projects and collaborations.

### 51. What are the main sources of funding for international research at your institution?

(Please select a maximum of three)

- Institution's own resources
- Grants from national governmental agencies
- Grants from national foundations and NGOs
- Funding from national private companies
- Grants from international organizations and foreign funding governmental agencies
- Grants from international (foreign) foundations and NGOs
- Funding from international (foreign) private companies
- There is almost no funding for international research
- Other (please specify): .....

### 52. In the last five years political relations between some countries in the world have changed and in some cases have become more tense. How has this impacted the internationalization of research at your institution?

(Please select only one)

- Our international research was not affected by changed political relations
- Our institution was required to revise its research partnerships in some specific disciplines with institutions in some countries because of newly introduced governmental rules and regulations
- Our institution chose to revise its research partnerships in some specific disciplines with institutions in some countries because of its own decision

- Our institution was required to revise its research partnerships in all disciplines with institutions in some countries because of newly introduced governmental rules and regulations
- Our institution chose to revise its research partnerships in all disciplines with institutions in some countries because of its own decision
- Our institution was required to completely suspend research partnerships with institutions in some countries because of newly introduced governmental rules and regulations
- Our institution chose to completely suspend research partnerships with institutions in some countries because of its own decision

## F) Internationalization and societal/community engagement

### 53. How are internationalization and societal/community engagement linked at your institution?

(Please select only one)

- There is no explicit link between internationalization and societal/community engagement at our institution and no assessment of the impact of internationalization policies and activities on the local community is conducted
- There is an explicit link between internationalization and societal/community engagement at our institution at policy level, but no real assessment of the impact of internationalization activities on the local community is conducted
- There is an explicit link between institutional policies and activities in internationalization and societal/community engagement at our institution and internationalization policies and assessment proves that activities are a means to benefit the local community

### 54. In which of the following ways are internationalization and societal/community engagement linked at your institution?

(Please select all that apply)

- As part of its mission of service to society, our institution is committed at the regional level and also involves neighboring regions
- Our institution awards prizes or tokens of recognition to international personalities or local personalities who distinguish themselves abroad
- Our institution develops and promotes international development cooperation
- Our institution organizes events (e.g. conferences, public debates, etc.) involving international speakers from other countries
- Local and international students are encouraged to carry out community engagement activities
- Teachers and researchers are encouraged to provide services or carry out other community engagement activities with foreign partners
- Technology and expertise transfer includes activities abroad

### 55. Has internationalization helped to increase intercultural understanding and reduce racism/xenophobia within your institution and in the local community?

(Please select only one)

- Internationalization has not really helped to increase intercultural understanding, on the contrary, racism/xenophobia increased both at our institution and in the local community

- Internationalization has not helped to increase intercultural understanding; racism/xenophobia is present both at our institution and in the local community, but has not increased
- Internationalization has helped to promote intercultural understanding and reduce racism/xenophobia at our institution, but not in the local community
- Internationalization has helped to promote intercultural understanding and reduce racism/xenophobia at our your institution and in the local community

## G) Emerging issues and the future of internationalization

### 56. Has your institution adopted special policies/measures in the last five years to respond to the increasing numbers of refugees and/or migrants seeking to enroll in HE?

- Yes
- No

### 57. If yes, please select the policies/measures adopted by your institution to support refugees and/or migrants:

(Please select all that apply)

- Adopting a strategy specifically intended to support refugee students, academic and administrative staff
- Taking actions that directly support refugee/migrant students, academic and administrative staff
- Creating scholarships/grants for refugee students, academic and administrative staff
- Adapting recognition procedures to admit refugee students
- Creating specific courses/programs for refugees/migrants
- Offering distance education and/or online courses targeting refugee/migrant students
- Hosting academic, researchers or administrative staff with a refugee background
- Offering specific support to refugees and migrants
- Working with NGOs and civil society groups to facilitate integration of refugees/migrants
- Other (please specify): .....

### 58. In which of the following ways are internationalization and sustainable development linked at your institution?

(Please select only one)

- There is no explicit link between internationalization and sustainability initiatives/strategies
- Internationalization policies and activities take into account climate action and environmental protection
- Internationalization activities are linked to sustainability initiatives (also beyond climate action) but there is not an overall strategy to link the two
- The institution has a policy/strategy to use Internationalization as a means for the institution to support sustainable development

**59. Does internationalization policy/strategy and related activities at your institution take into account diversity, equity and inclusion?**

- Yes
- No

**60. If yes, who are the priority target groups for equity and inclusion?**

(Please choose a maximum of three)

- Ethnic/cultural minorities
- First generation into higher education students
- LGBTQ+ community
- People with disabilities
- People from low economic background
- People from rural areas
- Migrants
- Non-traditional learners (adult learners, workers, unemployed people, etc.)
- Refugees
- Women

**61. What do you expect as the main challenges in the coming years with regard to recruitment of international Degree-Seeking students?**

(Please choose a maximum of three)

- Difficulties related to recognition of prior qualifications
- Environmental sustainability concerns
- Increased competition among institutions
- Housing availability
- Lack of financial support
- Language barriers
- Mistrust due to cases of corruption/fraud
- Policy changes in host countries
- Policy changes in source countries
- Security concerns
- Health and safety concerns
- Visa/immigration policies
- Xenophobia/racism
- Other (Please specify): .....

**62. What do you think will be the most pressing future priorities for internationalization at your institution**

(Please choose a maximum of three)

- Academic staff training in international, intercultural and global competencies
- Administrative staff training in international, intercultural and global competencies
- Internationalization and interculturalization of the curriculum at home for all students
- Decolonization/localization of the curriculum
- Increasing the number of incoming degree-seeking international students
- Diversifying international student recruitment to include students from more/ different countries

- Increasing the number of outgoing mobile students (undertaking study abroad and exchange) activities
- Enhancing virtual forms of internationalization
- Enhancing our research capacity and quality through international partnership
- Ensuring that the institution's internationalization strategy and activities are as climate-friendly as possible
- Ensuring or increasing the positive impact of internationalization for the local society
- Making internationalization more equitable and inclusive both in terms of people participating in it and of diverse cultural perspectives represented
- Using internationalization as a means for the institution to support sustainable development
- Other (Please specify): .....

### Contact details

Replies are anonymous; the following information is requested in case we have questions or need clarification about your response. Your information will be used solely for this survey.

**63. First Name and Surname:**

**64. Email address:**

**65. Which position best describes you?**

(Please select only one):

- Head of Institution (President/Rector/Vice Chancellor)
- Deputy Head of Institution (Vice-President/Vice-Rector/Deputy Vice-Chancellor/Chief Academic Officer/Provost)
- Registrar
- Dean
- Academic Department Head
- Professor/researcher
- Head of International Office
- Staff member in International Office
- Other (please specify): .....

**66. Which units/individuals inside your institutions did you consult to reply to this questionnaire?**

(Please select all that apply):

- Head of Institution (President/Rector/Vice Chancellor)
- Deputy Head of Institution (Vice-President/Vice-Rector/Deputy Vice-Chancellor/Chief Academic Officer/Provost)
- Registrar
- Dean
- Academic Department Head
- Professor/researcher
- Head of International Office
- Staff member in International Office
- Other (please specify): .....

## Annex 9

# Secondary analysis of HEI level of qualification offered

In the 6<sup>th</sup> IAU Global Survey, a secondary analysis was conducted to address the issue of 34 HEIs that replied “Doctorate” as their only level of study. This raised concerns about the coherence of their responses, as it seemed unlikely that these institutions offer only doctorate-level qualifications without any bachelor’s or master’s programs.

Upon further investigation via the WHED, it was discovered that these 34 HEIs had provided incorrect data. The incorrect replies can be categorised into two types: “Type 1” represents instances where the respondent indicated only “Doctorate” as their highest level, despite offering all three levels (BA/BSc, MA/MSc, and Doctorate), while “Type 2” indicates that the respondent replied only “Doctorate” as if it was the only level not offered at their institution. Out of the 34 incorrect replies, 29 were classified as “Type 1,” and 5 as “Type 2.”

In order to assess the potential impact of the inconsistent responses regarding the level of qualifications offered by participating HEIs, a secondary analysis was conducted. This analysis involved comparing the results obtained from the overall dataset, which includes all responses (both consistent and inconsistent) (Table 1), with a separate analysis correcting the replies of those 34 HEIs (Table 2).

As Table 2 shows, the corrected dataset revealed a 4-percentage point increase for both BA/BSc (1<sup>st</sup> cycle) and MA/MSc (2<sup>nd</sup> cycle) levels, bringing their percentages to 95% and 92%, respectively. The percentage for Doctorate (3<sup>rd</sup> cycle) level remained slightly the same at 70%.

**Table 1**

Bachelor (1 <sup>st</sup> cycle) or equivalent level (ISCED 6)	91%	657
Master (2 <sup>nd</sup> cycle) or equivalent level (ISCED 7)	88%	633
Doctorate (3 <sup>rd</sup> cycle) or equivalent level (ISCED 8)	71%	514

**Table 2**

BA/BSc (1 <sup>st</sup> cycle) Level	95%	686
MA/MSc (2 <sup>nd</sup> cycle) Level	92%	662
Doctorate (3 <sup>rd</sup> cycle) Level	70%	509

## Conclusion

The secondary analysis highlights the significance of rigorous data collection and validation procedures. Although the inclusion of inconsistent responses in the overall dataset provides a comprehensive representation of the data, it is important to interpret the results with an awareness of these discrepancies. This is another reminder about the importance of addressing data inconsistencies and improving data collection practices for enhancing future surveys on qualifications offered by HEIs worldwide. No matter how clearly a question is written there is always a degree of interpretation of the question that might lead to misunderstandings and inconsistent replies.





“A reliable roadmap for learning and enhancing the internationalization process in higher education.”

**Inga Žalėnienė,**

Rector, Mykolas Romeris University, Lithuania

“An invaluable and undeniable source for researchers and practitioners involved in the study or management of internationalization.”

**Jocelyne Gacel-Ávila,**

Professor and UNESCO Chair on Internationalization of Higher Education and Global Citizenship, University of Guadalajara, Mexico

In its Strategy 2030, the International Association of Universities (IAU) put renewed attention on the inclusive nature of the internationalization process, both in terms of people and ideas, and on its ultimate goal: societal benefit. To reach this ultimate goal, the IAU has established strategic objectives, the first of which is that HEIs and higher education stakeholders around the world have a clear understanding of internationalization and are aware of the latest trends and developments. Conducting research and the global surveys on internationalization are the main tools at IAU's disposal for achieving this objective.

The IAU 6<sup>th</sup> Global Survey on the Internationalization of Higher Education, conducted in 2023, received responses from 722 higher education institutions (HEIs) in 110 countries and territories. The resulting survey report published in 2024 analyses the findings in order to present both global and regional trends. Furthermore, the report compares current findings with data from the IAU's previous Global Surveys on Internationalization in order to explore long-term changes occurring in the internationalization field.

The study highlights interesting comparisons between private and public HEIs across different regions and looks for common understandings of the potential benefits, risks, and challenges facing internationalization at the global level. The report further provides insights into intersectional aspects of internationalization in teaching and learning, research and society/community engagement, and links between internationalization and societal priorities such as sustainable development, diversity, equity, and inclusion. In doing so, the 6<sup>th</sup> IAU Global Survey paints a picture of the current state of internationalization around the world, its recent transformations, and its possible evolutions moving forward.

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