The very nature of the International Association of Universities requires that the association pay attention to the trends and developments in the internationalization process. For almost a decade now, the IAU has surveyed its Members and the wider higher education community of institutions and university associations to learn more about the strategies and the approaches to internationalization that are being invented and applied around the world.

By publishing reports of the findings, the IAU shares this knowledge widely and underlines both the positive and the potentially negative aspects of this transformative process that is labelled the internationalization of higher education.

This 3rd Global Survey is the largest one undertaken so far. It builds on the excellent analytical work done by Dr. Jane Knight in the past two IAU surveys (2003 and 2005) and draws on the expert input of a group of higher education professionals and specialists from every region of the world. These international experts helped design the two new questionnaires used for collecting data from institutions and associations respectively.

Several also agreed to analyze the institutional responses gathered from their region. Their commentary, in Part IV of this Report, brings new insights to the aggregate and regional comparisons.

As the importance of internationalization increases in most higher education institutions the need to know more about successful or innovative strategies grows as well. For IAU, the desire to assist institutions when they seek strategic solutions to the internationalization challenge has led to a stronger focus on the institutional characteristics that may or may not influence the policy and strategy choices taken. Continuing to learn about the motivation of universities, their priorities and focus in internationalization is part of this work. In addition, delving deeper into the institutional profile and management practices, now forms part of this survey’s stronger focus on learning what works, why, and at what kind of Higher Education Institution.

This is why the 3rd Global Survey includes more detailed questions about the seniority of the person responsible for internationalization, the size of the human resource allocation to this area, and probes how funding and attention are distributed to various priority activities in internationalization. These and other new areas investigated in this report may serve in the development of new institutional policies. They may also provide institutions and policy makers with information they need to address the public policies with regards to instruments and approaches that might be needed to facilitate their work. Such additional areas of investigation also further IAU’s purpose, which is to dig beyond the goals and commitments made on paper, to see if institutional practice and actions are in line with these same objectives.

The Highlights of Findings presented on the following pages of this Executive Summary distil the main results from the data collected using two questionnaires: one for institutions and a second one for associations of universities. The data collected is rich, and numerous additional results and insights are presented in all sections of the report over and above the highlights presented here. At the same time, words of explanation and caution need also be expressed in several areas with regard to the data:

- first, even though the institutional sample is far larger in the 3rd Global Survey (745 HEIs)
than in the past, it remains relatively small overall. In some parts of the world it is less representative of the overall pool of institutions than in others. Thus while the aggregate and regional results do provide a general picture, there are, of course, many institutions that would not fit into the frame of the tableau presented;

- second, comparisons over time are essential to monitor trends. Yet, the questions asked in the survey cannot remain frozen in time just so that these comparisons can be perfect. For this reason, while the 2005 and 2009 results can be set side by side and compared, the comparison is often imperfect, as there were slight but real differences in the question asked or optional responses offered;

- and third, having turned to the regional experts in designing the survey in 2009, IAU accepted their recommendation and adjusted the regional distribution of countries (and thus HEIs) to place Mexico in Latin America and Caribbean rather than in North America where it was in the 2005 Global Survey.

Internationalization of higher education is changing. It is an issue of far more importance in overall higher education policy than in the past, both at the institutional level and in many national public policies. As found in this Survey and in the recently published EUA report Trends 2010, internationalization is seen as a highly influential development in higher education. In Europe, the EUA report shows that internationalization was given third highest value, following the Bologna Process and Quality Assurance Reforms by the HEIs that responded in the trends survey (EUA, Trends 2010, pp.73).

Though there are many other areas of convergence globally noted in the results, the differences that the IAU 3rd Global Survey findings bring to the fore, though, also constitute evidence that the global higher education landscape is far from homogenous, even if the pressures for reform and change may seem similar around the world.

Regional differences and regional dynamics are strong and likely to persist, given the steadfast intra-regional focus of internationalization strategies. Some of the differences that become apparent in this report also underline the unrelenting divide between developing and industrialized countries’ higher education systems. The reality of such gaps or differences can more easily be addressed in internationalization strategies, if they are known and recognized. Thus comparing rationales, benefits, perceived risks and obstacles remains valid, both at aggregate level where similarities prevail and at regional level where differences shine through. Finally, the inconsistencies between rhetoric and reality are useful to note too, if there is to be hope to redress them. A case in point in this 3rd Global Survey is the reality of limited international student mobility and the policy importance given to this area by the vast majority of the HEIs and decision-makers.

Given the current and intense economic crisis, it is not really surprising to find that the strongest and if not unique area of complete consensus in the Survey has to do with the lack of funding as the top internal and external obstacles to internationalization for higher education institutions worldwide. When coupled with the strong and growing importance assigned to internationalization, future surveys will need to monitor changes in this regard and see if institutions find viable alternatives to overcome this reported shortage of funding and still pursue the internationalization of higher education.

Funding, or lack thereof, is not, however, the only obstacle and noting the others is also essential to understanding where policy and attention need to be directed. Some of these barriers may be more easily resolved at the institutional level – for example difficulties of recognition of periods of study and credentials obtained elsewhere. Others, on the contrary, will require government level policy action. The most pressing example of the latter hindrance
to internationalization is the issue of visas for outgoing and in-coming students. Evidence from surveys such as this one, may help advocate more effectively for changes in these matters.

In light of the diversity of its membership and the higher education institutions more generally, the 3rd Global survey also seeks to find out whether the size of the institution makes a difference to the internationalization objectives it pursues, the benefits it expects to gain and the priorities it choses to emphasize. Knowing more about the similarities and variation that are linked to size of the institutions, for example in terms of the importance that leaders attribute to internationalization, may also be helpful in determining strategy and seeking partners for cooperation. Some of these comparisons according to size are found in Part II.

As the actors in higher education increase in number, the institutions as well as governments and other stakeholders can turn to a variety of sources of information and expertise including in the area of internationalization. Yet, to the extent they exists, national university associations often have the mandate to represent the views of their members on the one hand and seek to serve the institutional members on the other hand. Learning more about their interest in and their influence over the internationalization trends at the national and institutional levels was the rationale for continuing to survey such associations once again.

Part III presents the findings from this aspect of the 3rd Global Survey and demonstrates that national associations of universities tend to be well-versed in their members' positions though in terms of internationalization they consider that their members assign less importance to this process than they themselves do. There is also a shared view of the main obstacles to increased internationalization which were identical when the institutional results at the aggregate level were compared with the results of the NUAs. Interestingly enough, though, the priority actions of the NUAs do not appear to be related to overcoming the major difficulties identified by the institutions. Perhaps the findings of the Survey may lead to some discussion and perhaps even new services offered to institutions by their national associations to address these issues. Unfortunately, the NUA sample remains very small and is overwhelmingly dominated by European associations. It makes in-depth analysis of the responses difficult and regional comparisons somewhat ineffectual. Future surveys of this kind will require a special effort to engage national associations and secure their collaboration.

In Part I, the General Analysis of Institutional Findings presents a discussion of results at both aggregate and regional levels. To supplement the examination for these results and rather than drawing all the conclusions strictly on the data collected, the IAU 3rd Global Survey has invited several regional experts to draw upon their own expertise to discuss findings from their respective regions. In their brief sections, which forms Part IV of the report, these authors underline some of the causes for and potential implications of the results found in the various parts of the world. Their regional insights enrich our collective understanding of the positive and potentially negative trends that are developing under the very broad banner of internationalization. These contributing authors help explain, for instance, why intra-regional cooperation is important for HEIs in their region or to assess what the real impact on internationalization may be of poor language capacity and expertise of staff members. These contributions to the overall report may also provide useful keys to the design of more productive, mutually beneficial and equitable cross-regional partnerships. The overall report makes it clear that challenges to internationalization are many but the need for the process to be implemented is well recognized, as are the expected benefits.

The concluding section thus adopts a slightly different prism through which to look at the results in order to identify some recurrent as well as new challenges to keep in mind as the institutions, their national associations as well as the IAU look towards the future.